



Arctrieval <> Smokeball Integration Setup Guide

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1. Introduction

Arctrieval is a unique software-based approach to obtaining, managing, and accessing medical records, billing information, and imaging studies for legal professionals. Smokeball is a leading case management system law firms use to manage their business.

Arctrieval's integration with Smokeball is a testament to our commitment to our mutual customers. This integration offers enhanced functionality and features that improve your workflow and enhance the user experience, ultimately making your work more efficient and effective.

2. Functionality Overview

Arctrieval's integration provides the following functionality between the two systems.

1. Client Information
 - a. Import Smokeball Contact information for a Client into an Arctrieval Client record through the Arctrieval Add Client process. One Client is added from Smokeball to Arctrieval at a time.
 - b. Pull updated Smokeball Contact information for a Client into the Arctrieval Client record through the Arctrieval Client Activity Update From Smokeball process. Client information is updated in Arctrieval one Client at a time.
 - c. Push updated Arctrieval Client information from Arctrieval Client records to Smokeball Contact information for a Client through the Arctrieval Edit Client process. When Client information is updated in Arctrieval, the Arctrieval User is prompted to update the Smokeball Contact information for the Client.
 - d. Link an existing Arctrieval Client record with an existing Smokeball Contact information for a Client.
 - e. Remove the link between a Smokeball Contact for a Client and the Arctrieval Client record. Only an Administrator-User or User with the appropriate permissions may break the connection.
2. Business/Organization Contact Information (Arctrieval Contact)
 - a. Import Smokeball Business/Organization information (Medical Provider) into an Arctrieval Contact record through the Arctrieval Add Contact process. Each Business/Organization is added from Smokeball to an Arctrieval Contact one at a time.
 - b. Pull updated Business/Organization information (Medical Provider) information into the Arctrieval Contact record through the Arctrieval Contact Activity Update From Smokeball process. Contact is updated in Arctrieval one at a time.
 - c. Push updated Arctrieval Contact information from the Arctrieval Contact record to Business/Organization in Smokeball through the Arctrieval Edit Contact process. When Contact information is updated in Arctrieval, the Arctrieval User is prompted to update the Business/Organization information in Smokeball.
 - d. Link existing Arctrieval Contact record with an existing Business/Organization in Smokeball.
 - e. Remove the link between Smokeball Business/Organization and the Arctrieval Contact record. Only an Administrator-User or User with the appropriate permissions may break the connection.
3. Link Arctrieval Request to an existing Smokeball Matter
 - a. When the request is sent through Arctrieval, the User selects a Smokeball Matter, and Arctrieval automatically links it to the Smokeball Matter.
 - b. If a request was started, created, and sent through Arctrieval, the request can be linked after the fact to an existing Smokeball Matter.
4. Unlink Arctrieval Request from an existing Smokeball Matter

- a. Remove the link between the Smokeball Matter and the Arctrieval Request. Only an Administrator-User or User with the appropriate permissions may break the connection.
- 5. Data synchronization between Arctrieval and Smokeball
 - a. Arctrieval creates an Arctrieval folder on the Documents tab when a request is issued or linked.
 - b. Within the Arctrieval folder:
 - i. Each Arctrieval request activity is stored in a subfolder with the request ID, the facility's name, and the type of request (medical, billing, or imaging).
 - ii. All documents related to the request are stored in the request folder.
 - c. Arctrieval creates and maintains a Memo for each request.
 - d. All documents created or uploaded in Arctrieval are uploaded to the designated request document folder in Smokeball.

3. Document Change History

Date	Document Revision	Description of Changes
5/15/2025	1.0	Initial Document.

4. Integration Setup

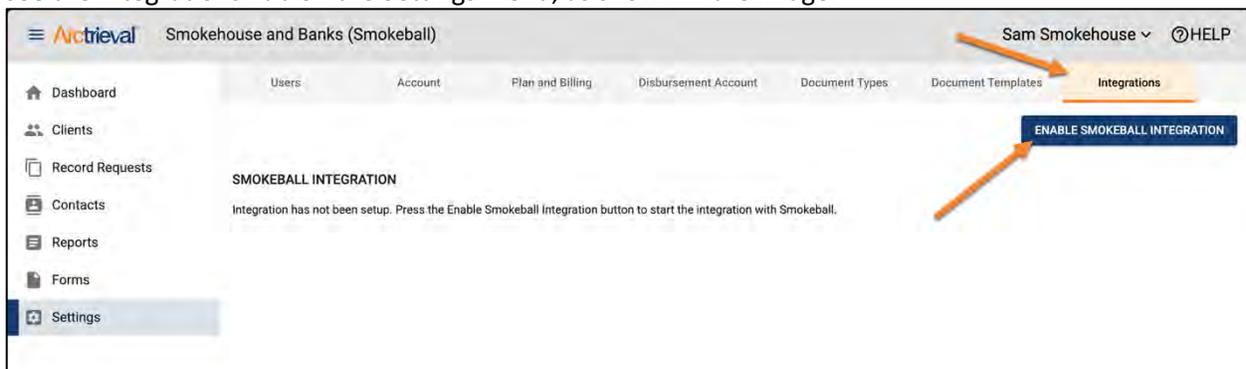
4.1. Overview

To enable Smokeball and Arctrieval to communicate and exchange data, the following must occur:

1. Arctrieval activates the Integrations tab in the Arctrieval Settings for firms with a multiple-user subscription. The Smokeball integration feature is only available to firms with a subscription for multiple users. Please contact Arctrieval to activate the feature.
2. On the Arctrieval Integration page, in the Settings menu, you must grant Arctrieval access to your Smokeball Account to establish the link with Arctrieval.

4.2. Establishing the Link Between Smokeball and Arctrieval

Once the Smokeball and Arctrieval integration is enabled, the Arctrieval Attorney Firm Administrator will see the Integrations Tab on the Settings menu, as shown in the image.



Clicking the Enable Smokeball Integration button will redirect you to the Smokeball application, where you must approve Arctrieval’s access to your Smokeball account, as shown in the image.

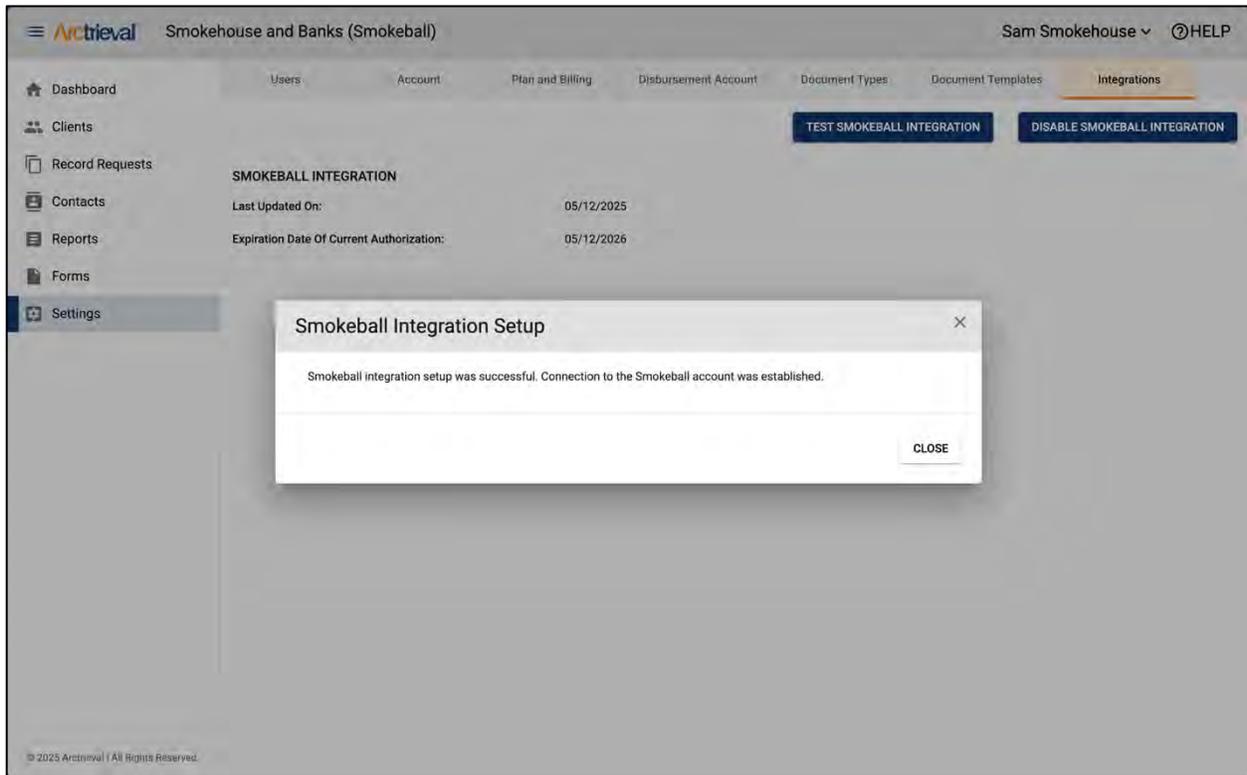


If the Smokeball Integration is active in your Arctrieval account, the Arctrieval Matter tab is removed from the left-hand menu to avoid user confusion.

If you have not been previously authorized in the current browser, you must enter your email and password to access Smokeball.

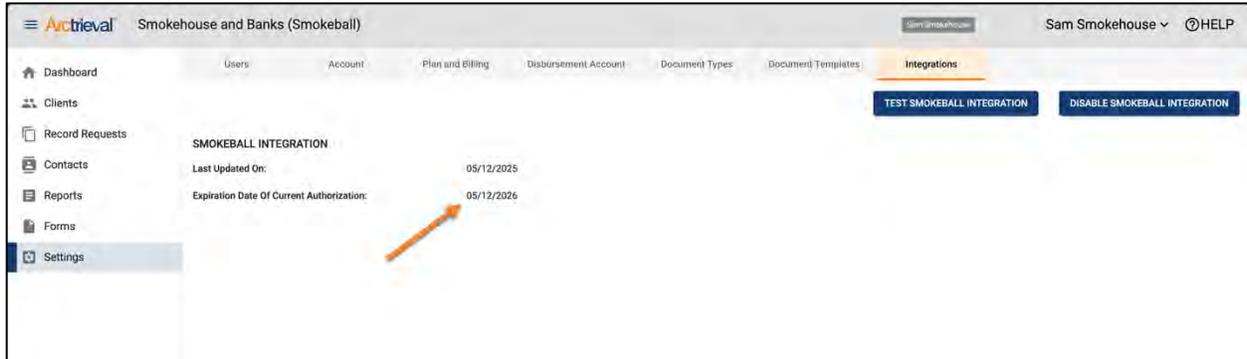


After allowing Arctriever access to your Smokeball account you are redirected back to Arctriever. If Arctriever successfully established the connection with Smokeball you will see the following message.



5. Authorization Renewal

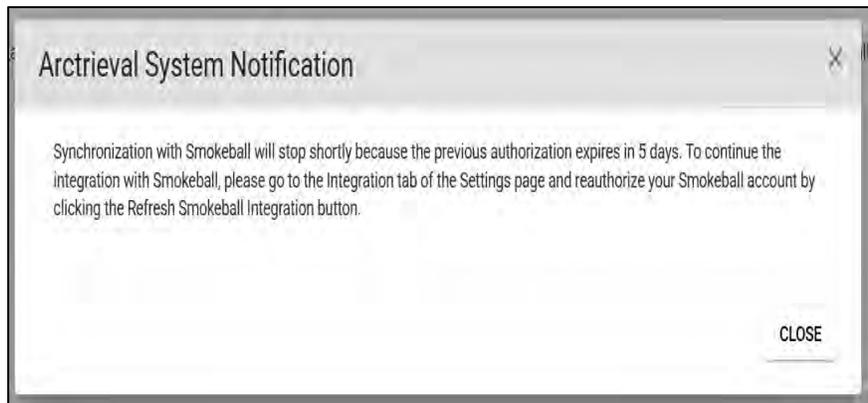
The connection with Smokeball is valid for one year. To continue the integration, it is necessary to update the authorization data in a timely manner by repeating all the steps described above. The date on which your current Smokeball authorization is shown in the details on the Integrations tab.



Arctrieval will notify you that your authorization is about to expire with the following reminders.

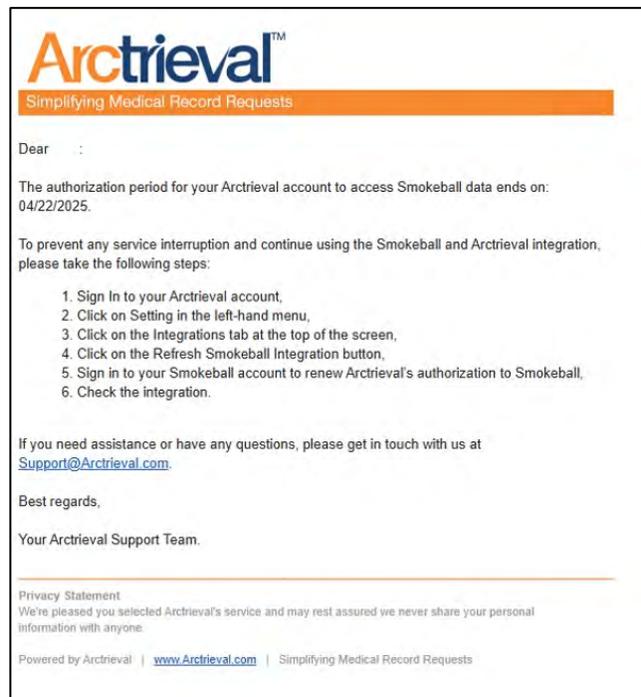
5.1. System Notification

Within 15 days before your current authorization expires, you will see the following message when you access Arctrieval.



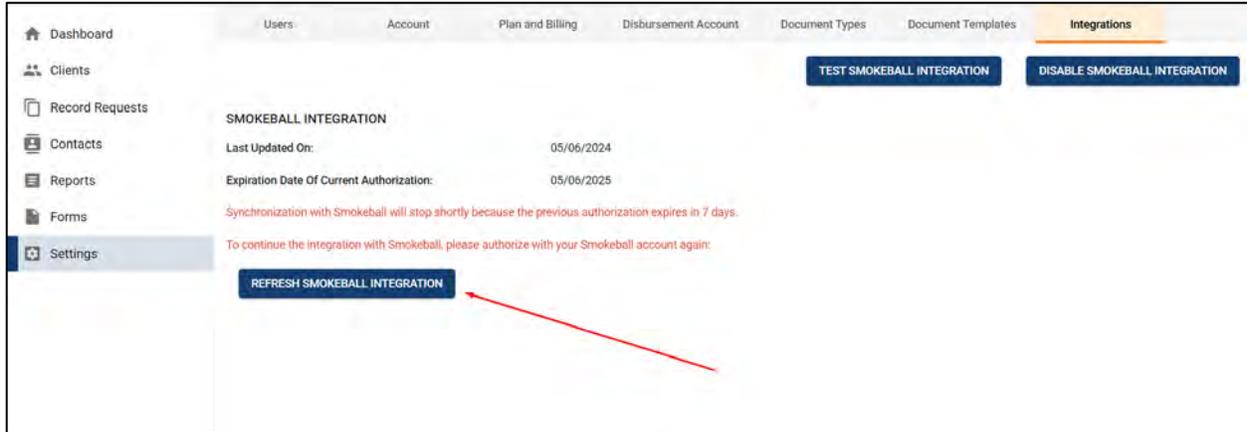
5.2. Email Notification

An email is sent to all of the Arctrieval firm administrators informing them that their current Smokeball authorization will soon expire. These emails are sent 30, 15, and 1 day before the expiration date. An example email is shown.



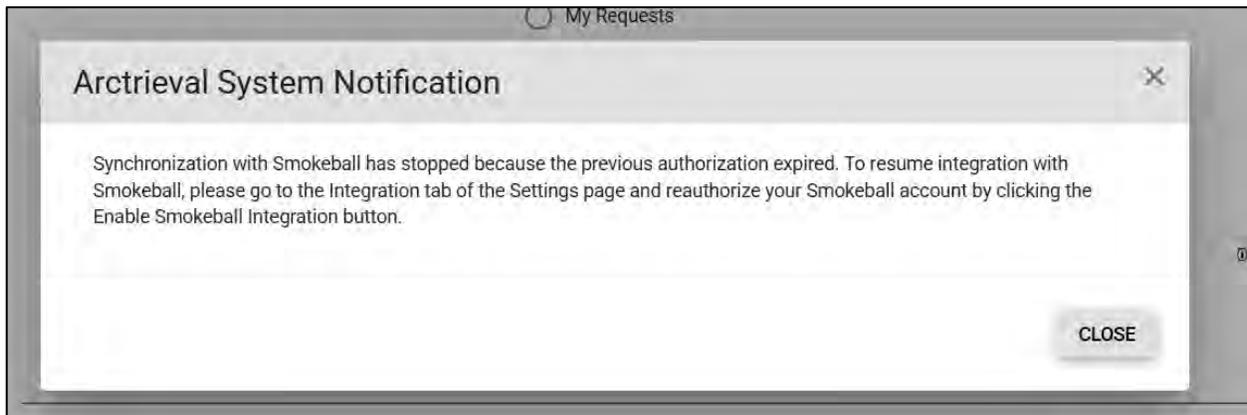
5.3. Updating Smokeball Authorization

To update Smokeball authorization data, your firm's administrator needs to go to the Integrations tab on the Settings page. There you will see an additional message that the authorization is about to expire and a button to refresh the authorization data.



By clicking the Refresh Smokeball Integration button, you will need to re-enter your Smokeball user data. Once the connection to Smokeball has been successfully established, the authorization expiration date will be updated to one year from the date the authorization data was updated.

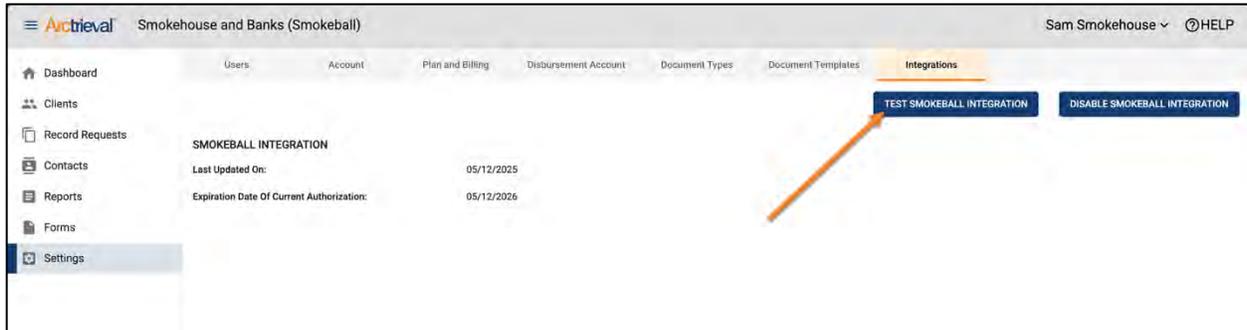
If the authorization is not updated, all synchronization between Smokeball and Arctrieval will stop when the current Smokeball authorization expires. Users will be notified that the approval has expired.



Firm administrators will receive an email stating that the Smokeball authorization has expired and requires user data to be updated for the integration to work again.

6. Integration Testing

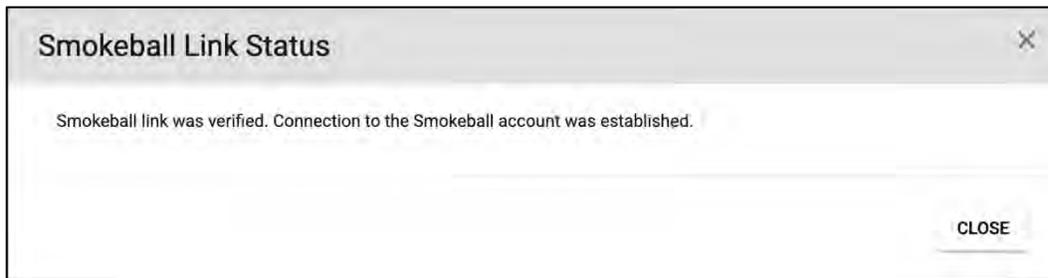
To verify the Smokeball integration settings, click the Test Smokeball Integration button as shown.



Arctriever will attempt to verify the connection.

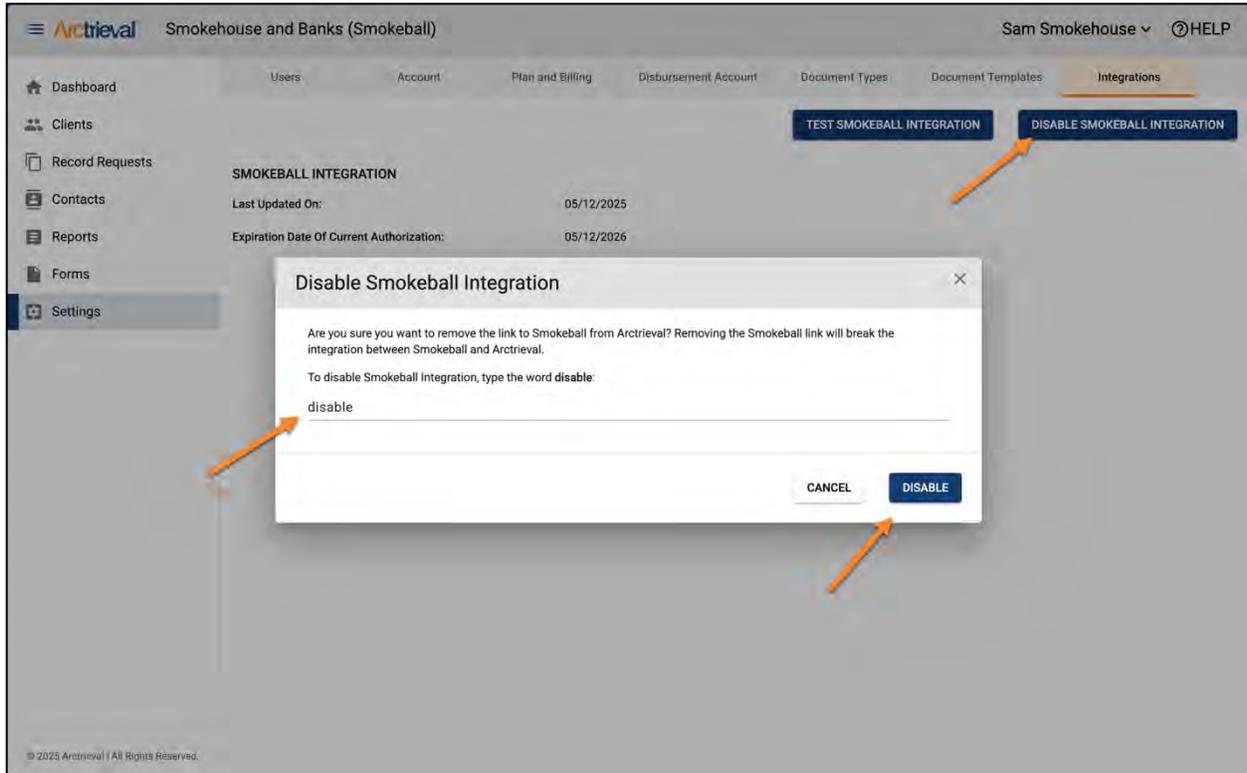
6.1. Connection Verified

If the connection is established, the following message is displayed.



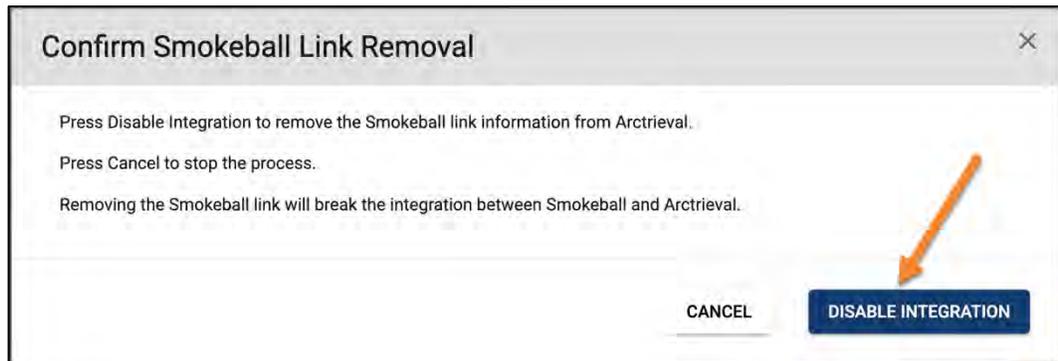
7. Disable Smokeball Integration

To disable the Arctrieval integration with Arctrieval, click on the Disable Smokeball integration button to display the Disable Smokeball Integration dialogue box as shown.



Enter “disable” to proceed and press the Disable button, as shown below.

Arctrieval then prompts you to confirm disabling the integration. To proceed, click the Disable Integration button as shown.



After the integration is disabled, the following message is displayed.

