

NEW FOR SKIPLOOK MEMBERS

Skiplook Case Files

Your own private case management system, built into your Skiplook membership. This guide covers what it does, how to use each part, and how your files are protected.

Open it: log in to Skiplook and go to **skiplook.com/case-files**, or use the Case Files link in the member hub.

Standard (\$25/month)

50 files

All Case Files features

Premium (\$50/month)

100 files

Plus employees who can work your files

What it is, and what it isn't

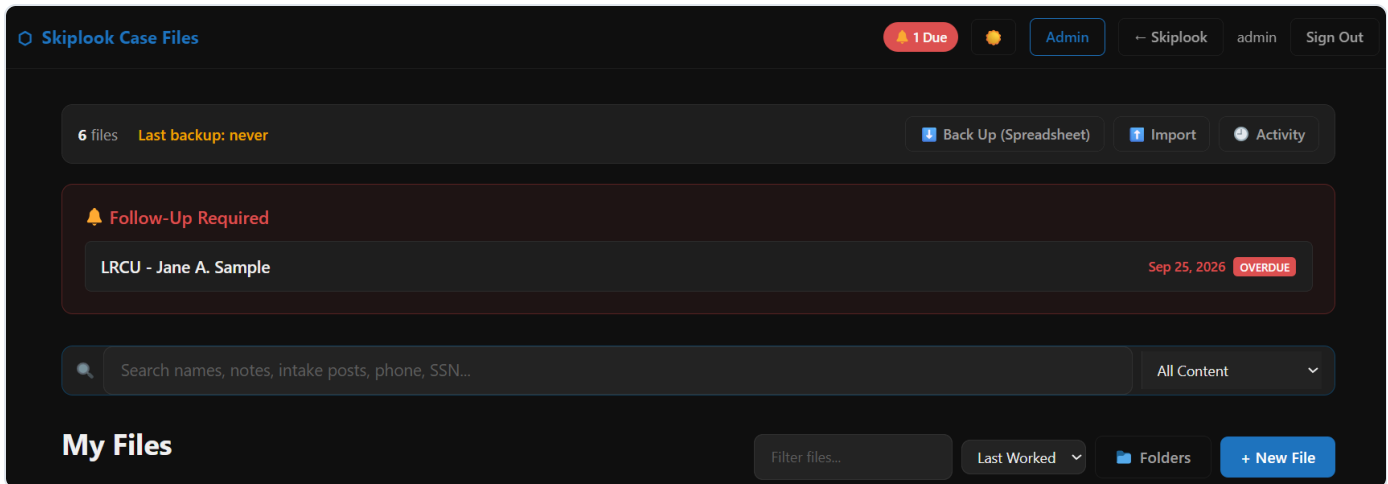
What you get

- Case files with an intake post, notes and details
- SSN, date of birth and account number hidden until you click Reveal
- Skip Trace button: phones and addresses become one-click searches
- Time, mileage and expense tracker on every file
- Follow-up reminders, folders, pinning and search
- Print or save a file as a PDF, choosing which notes go in
- Spreadsheet backup and import
- An activity log of everything done in your files

What it isn't

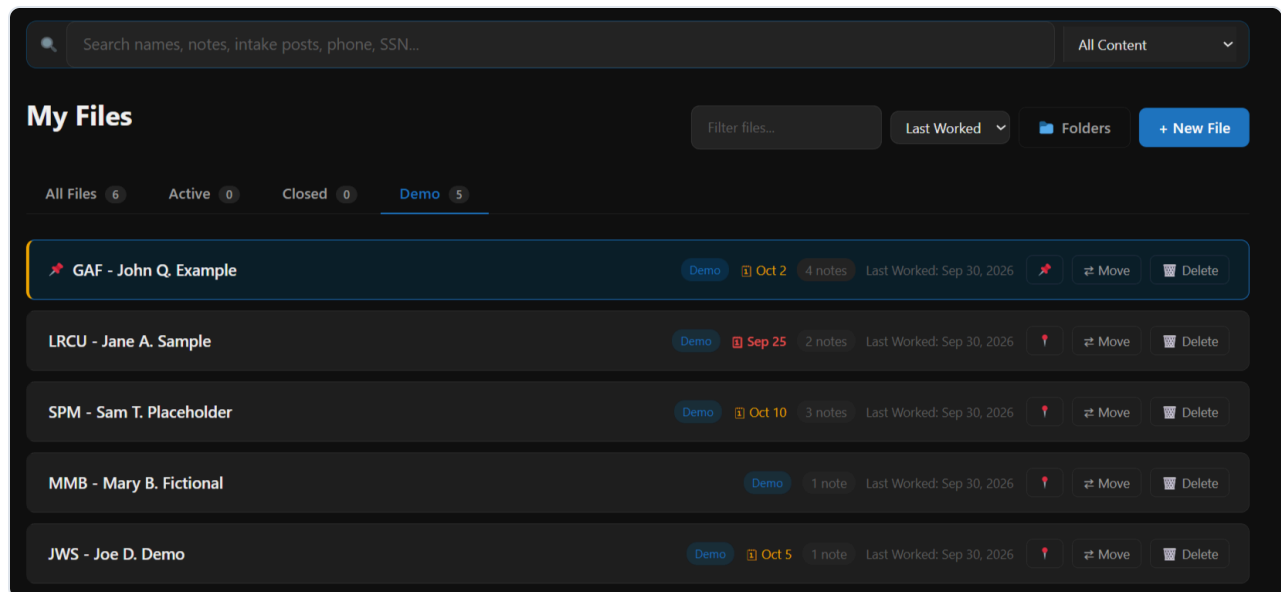
- **No file uploads.** Keep documents and photos in Google Drive and paste the link into a note. Share Drive files with specific people only, never "anyone with the link."
- **No client logins.** Your clients don't sign in. Send them a PDF of the file instead.
- It's a brand-new feature and it will keep growing. Your feedback decides what comes next.

Your files page



The top of your files page: file count, last backup, follow-ups due, and search.

- **File count and last backup:** how many files you've used, and how long since your last spreadsheet backup. It turns orange as a reminder.
- **Back Up (Spreadsheet)** downloads every file, note and expense to a spreadsheet. **Import** brings files in from a spreadsheet. **Activity** shows what you and your employees did in your files.
- **Follow-Up Required:** any file whose follow-up date is today or past shows here, with a count in the top bar.
- **Search** looks through names, notes, intake posts and details, including phone numbers and SSNs. Search results never show hidden numbers in full.



Each file shows as "Client - Subject", with its folder, follow-up date, note count and last worked date.

- **Folder tabs** (All Files, Active, Closed and your own) filter the list. Use **Folders** to add, rename or remove folders. Removing a folder keeps its files.
- **Filter** and **sort** (last worked, A to Z, newest, oldest) the list.
- On each file: **pin** it to the top, **Move** it to a folder, or **Delete** it.

- **Deleted files** go to the Recycle Bin (link at the bottom of the page). You can restore them for 30 days, then they're erased for good. You can also click Delete Forever right away.

Starting a new file

New Case File

Client * Subject Name *

ABC Jane Q. Sample

▼ Details (optional): SSN, DOB, phone, address...

SSN 🔒 Date of Birth 🔒

987-65-4329 06/06/1986

Phone Email

(603) 555-0199 name@example.com

Address

123 Sesame Street, Anytown, NH 00000

Employer Account / Ref # 🔒

Only Client and Subject Name are required.

1. Click [+ New File](#).
2. **Client:** your client's name, initials or code. **Subject Name:** the person the file is about. The file shows as "Client - Subject", for example "GAF - John Q. Example".
3. **Details (optional):** SSN, date of birth, phone, email, address, employer and account/reference number. SSN, date and phone format themselves as you type. The 🔒 fields stay hidden on screen until someone clicks Reveal.
4. Pick a **folder** and a **follow-up date** if you want one.
5. **Intake Post:** paste your data vendor report or intake information. Spacing and line breaks are kept exactly as pasted.
6. Click [Create File](#).

Working a file

Intake Post

Copy

Edit

SUBJECT: JOHN Q EXAMPLE DOB: 01/01/1980
SSN: 987-65-4320 (verified)

ADDRESSES (newest first)
123 Sesame Street
Anytown NH 00000
First seen 04/2026, last seen 09/2026
456 Pretend Avenue Apt 2B, Nowhere, NH 00000
2021 - 2026

PHONES
(603) 555-0142 Mobile last seen 09/2026
(603) 555-0187 Landline disconnected

EMPLOYMENT
Acme Trucking Co. (driver) 2024 - present

VEHICLES
2019 pickup truck, gray, plate DEMO-123

ACCOUNT
Auto loan charge-off, balance \$14,860.22, last payment 02/2026

Details

Reveal

Client GAF

Subject John Q. Example

SSN •••-••-4320

Date of Birth ••/••/1980

Phone (603) 555-0142

Email john.example@example.com

Address 123 Sesame Street, Anytown, NH 00000

Employer Acme Trucking Co.

Account / Ref # ••••1001

Folder Demo

Follow-Up Oct 2, 2026

Created Sep 30, 2026

Intake post on the left, Details on the right.

- **Intake Post:** **Copy** copies it, and **Edit** changes it.
- **Details:** **Reveal** shows the hidden SSN, date of birth and account number, and **Hide** covers them again. Every reveal is recorded in the activity log.
- **Top buttons:** **Edit** changes the client, subject, details, folder or follow-up date. **Pin** keeps the file at the top of your list. **Delete** sends it to the Recycle Bin.

Skip Trace

Skiplook Case Files

1 Due

Admin

Skiplook admin Sign

My Files > Demo > GAF - John Q. Example

GAF - John Q. Example

Skip Trace

Print / PDF

Unpin

Edit

Delete

Pinned

Updated Sep 30, 2026

Intake Post

Copy

Edit

SUBJECT: JOHN Q EXAMPLE DOB: 01/01/1980
SSN: 987-65-4320 (verified)

ADDRESSES (newest first)
[123 Sesame Street](#)
[Anytown NH 00000](#)
First seen 04/2026, last seen 09/2026
[456 Pretend Avenue Apt 2B, Nowhere, NH 00000](#)
2021 - 2026

PHONES
[\(603\) 555-0142](#) Mobile last seen 09/2026

Details

Reveal

Client GAF

Subject John Q. Example

SSN •••••-4320

Date of Birth ••/••/1980

Phone (603) 555-0142

Email john.example@example.com

Address [123 Sesame Street, Anytown, NH 00000](#)

With Skip Trace on, phone numbers and addresses become clickable Google searches.

Click **Skip Trace** to turn every phone number and address in the intake post, notes and details into a one-click Google search. Click it again to turn it off.

Notes and time & expenses

Notes

Demo Investigator Sep 22, 2026 9:14 am

Received file from client. Intake loaded. Starting skip.

Demo Investigator Sep 22, 2026 10:02 am

Called (603) 555-0187 - disconnected. Called (603) 555-0142 - voicemail, greeting says "John". Left message to call back.

Demo Investigator Sep 24, 2026 2:40 pm

Drive-by at 123 Sesame Street. Gray pickup in driveway, plate DEMO-123 matches. Did not make contact. Photos saved to Google Drive: <https://drive.google.com/drive/folders/DEMO-EXAMPLE-ONLY>

Demo Investigator Sep 26, 2026 11:30 am

Subject returned call. Confirmed address and employment. Wants payment arrangement - referred to client.

Type or paste your note here...

Time & Expenses

TIME

1.5 hr

MILEAGE

36 mi

EXPENSES

\$14.95

Sep 22, 2026 1.5 hr ×
Skip research + calls
Time (hours) - admin

Sep 23, 2026 \$14.95 ×
Data vendor report
Expense (\$) - admin

Sep 24, 2026 36 mi ×
Drive-by 123 Sesame Street
Mileage (miles) - admin

09/30/2026 Time (hours) ▾

Amount Note (optional)

+ Add

Notes on the left. Time, mileage and expenses on the right, with running totals.

Notes

- Type or paste into the box at the bottom and click **Submit Note**. Each note shows who wrote it and when.
- Web links in notes become clickable, which is how you link Google Drive files.
- **Copy**, **Edit** and **Delete** sit on each note. Employees can edit only their own notes.

Time & Expenses

- Pick a date and a type: **Time (hours)**, **Mileage (miles)** or **Expense (\$)**. Enter the amount and an optional note, then click **+ Add**.
- The totals at the top update as you go. Click × on an entry to remove it.
- Entries are included in your spreadsheet backup, and in a PDF if you tick them.

Print or save a PDF

Print / PDF

Choose what to include. Hidden numbers print the way they show on screen, so click Reveal first if you want them in full.

- ☒ Details
- ☒ Intake post
- ☒ Time & expenses

Notes All · None

- ☒ **Demo Investigator** · Sep 22, 2026 9:14 am
Received file from client. Intake loaded. Starting skip.
- ☐ **Demo Investigator** · Sep 22, 2026 10:02 am
Called (603) 555-0187 - disconnected. Called (603) 555-0142 - voicemail, greeting says "Jo..."
- ☒ **Demo Investigator** · Sep 24, 2026 2:40 pm
Drive-by at 123 Sesame Street. Gray pickup in driveway, plate DEMO-123 matches. Did not ma...
- ☒ **Demo Investigator** · Sep 26, 2026 11:30 am
Subject returned call. Confirmed address and employment. Wants payment arrangement - refer...

Print / Save PDF **Cancel**

Choose exactly what goes into the PDF.

Click **Print / PDF**, then tick what to include: details, intake post, time & expenses, and each note one by one. Untick internal notes you don't want a client to see. In the print window, choose **Save as PDF** to get a file. Hidden numbers print the way they show on screen, so click Reveal first if you want them in full.

Backup and import

- **Backups are your responsibility.** Click **Back Up (Spreadsheet)** as often as you like. You get one Excel file with three tabs: Files, Notes, and Time & Expenses. The "Last backup" reminder tells you when it's been a while.
- **Import:** click **Import**, then **Download Blank Template** for the right layout, or use a backup you made earlier. Each row on the Files tab becomes a file, and notes and expenses attach to the file with the same File #. You see a count before anything is added. Rows missing a client or subject are skipped, and so are duplicates if you leave that box ticked.
- The backup spreadsheet holds sensitive information. Keep it somewhere private.

Employees (Premium)

- Premium members can have employees work their files. Each employee needs their own Skiplook membership (\$25 or \$50) and their own login.
- To add one, send Skiplook your employee's username and we'll link them to your files.
- Your employee sees two tabs: **My Files** and **your files**. On your files they can read everything, add notes, edit their own notes, reveal hidden numbers and log time and expenses. They can't create or delete files, delete notes, or export.
- Use **Activity** to see exactly what your employees did, and when.

- If your Premium plan ends, your employees lose access to your files automatically.

Your privacy and security

- **Encrypted:** SSNs, dates of birth, account numbers, details, intake posts, notes and expense notes are stored encrypted. A stolen copy of the database is unreadable without the key, which is kept separately.
- **Only you see your files.** Other members can never see them. Employees see them only if you've added them.
- **Automatic log-out** after 30 minutes of inactivity on Case Files pages.
- **Activity log:** your logins to Case Files and every action by you and your employees (files created or edited, notes, reveals, exports) are recorded with the date and time.

When Skiplook opens your files

Skiplook staff do not browse members' files. An admin opens your files only when:

- an automated review flags possible illegal content,
- you ask us to, for example for help or to export your files, or
- we receive a verified court order.

Every admin visit is logged automatically, with the date, time, what was opened, and a written reason. The log is tamper-evident, which means any change to it shows up. Admin visit records are kept for 12 months, and you can request the log for your files at any time.

Automated review: Skiplook may use automated tools, including AI, to check files for illegal content, such as serious threats or anything involving the exploitation of children. These checks only flag possible problems for a person to review. SSNs and other hidden numbers are left out of them. Serious violations lead to immediate account suspension, and records are kept for law enforcement.

If your membership ends

When	What happens
Payment stops	Case Files closes right away, like every other member tool. Your files are kept, untouched.
Days 1–30	Ask Skiplook and we'll export your files for you.
Days 31–90	Renew your membership to get back in and export them yourself.
Any time before day 91	Renewing brings everything back exactly as you left it.
Day 91	Your files are permanently deleted.

Quick answers

- **At my file limit?** Delete a file you no longer need, or upgrade to Premium for 100. Files in the Recycle Bin don't count.
- **"Your session expired"?** Refresh the page.
- **Upgraded to Premium?** Your new limit applies automatically on the next page you open.
- **Feedback or ideas?** Case Files is brand new. Tell Skiplook what you like and what you need.

Skiplook Case Files — Member Guide · All names, addresses and numbers in the screenshots are fictional.