

FIRM CENTRAL

CLIENT PORTAL USER GUIDE

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Client Portal User Guide

In Firm Central, the Client Portal is a communication tool between your matter team and your client. It is more secure than email, and allows for a direct link between the matter page, relevant documents, and your client. In the Client Portal, you can add and share documents and communicate through matter comments with your client. The Client Portal subtab is available for each of your matters on Firm Central.

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Reference Attorneys
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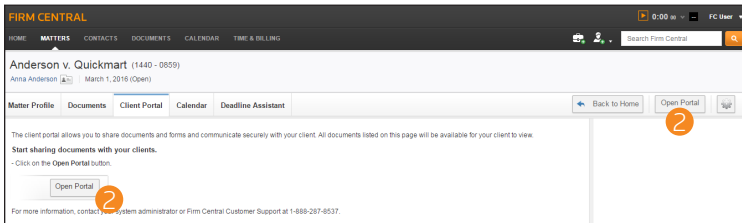
<http://legalsolutions.thomsonreuters.com/law-products/solutions/firm-central/support>

Getting Started

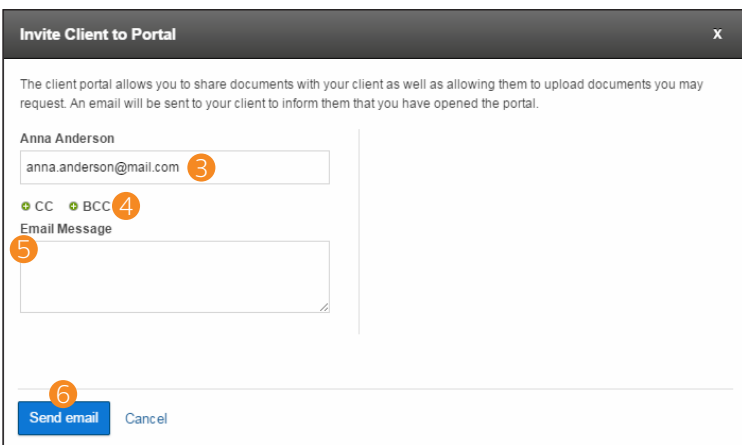
Before you can begin sharing and communicating between your matter team and your client, you must first open the Client Portal.



1 Log in to Firm Central and access the matter for which you want to set up a Client Portal. Click the **Client Portal** subtab.



2 Click **Open Portal**.

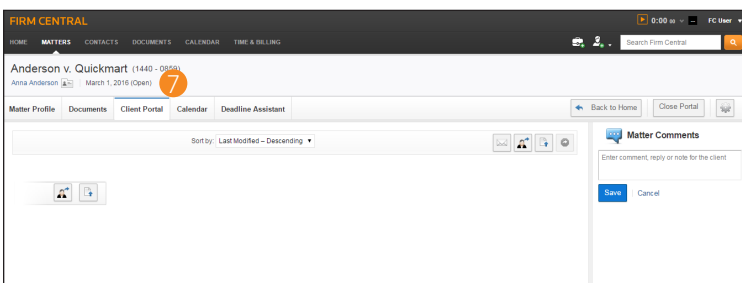


3 The Invite Client to Portal window will appear. Enter the client's email address in the field underneath his or her name.

4 Optionally, click the **+CC** or **+BCC** links to cc or bcc additional people in the email that will be sent to your client.

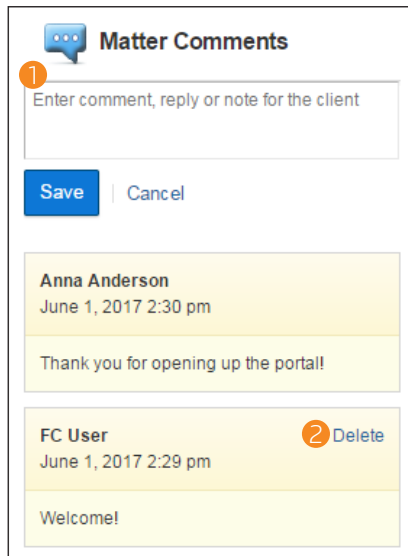
5 Optionally, enter a supplemental **Email Message**.

6 Click **Send email**. Your client will receive an email with an invitation to register for a OnePass account, which is how your client will access the Client Portal.



7 After your client registers and agrees to the terms of the subscriber agreement, you and your client are ready to share documents and send secure messages through the Client Portal. Your client can access the Client Portal at portal.westlaw.com

Client Portal Tools



MATTER COMMENTS

Matter Comments is a general means of communication between your matter team and your client.

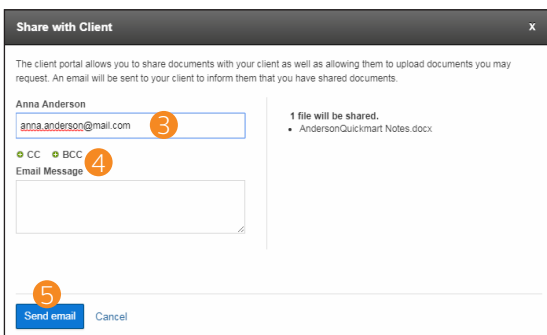
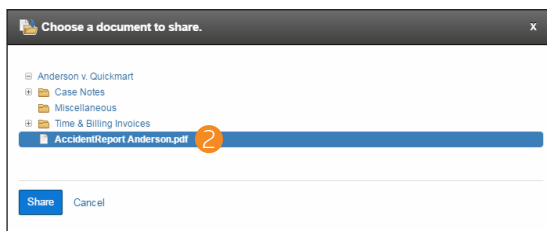
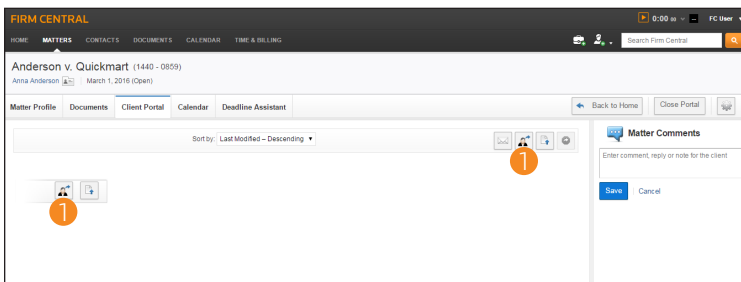
- 1 To leave a comment, type your message in the **Matter Comments** field. When you are finished, click **Save**. Your message will appear directly underneath the field, with the most recent messages displayed on top.
- 2 To delete a comment you created, click the **Delete** button in the comment header. Clients are unable to delete comments they created, and you cannot delete client comments.

Note: Matter Comments is not an instant messaging system. The page must be reloaded to view comments that have been added by another party while you are on the Client Portal.

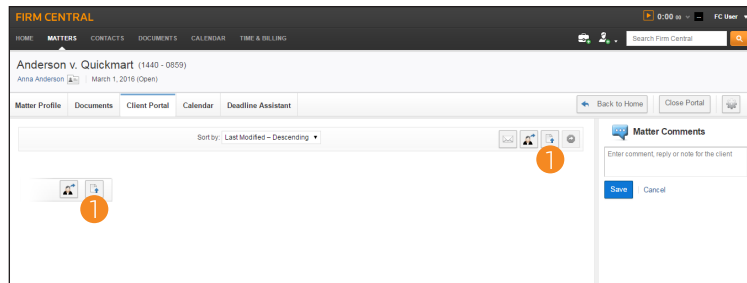
SHARING DOCUMENTS WITH YOUR CLIENT

Share an Existing Document or Form

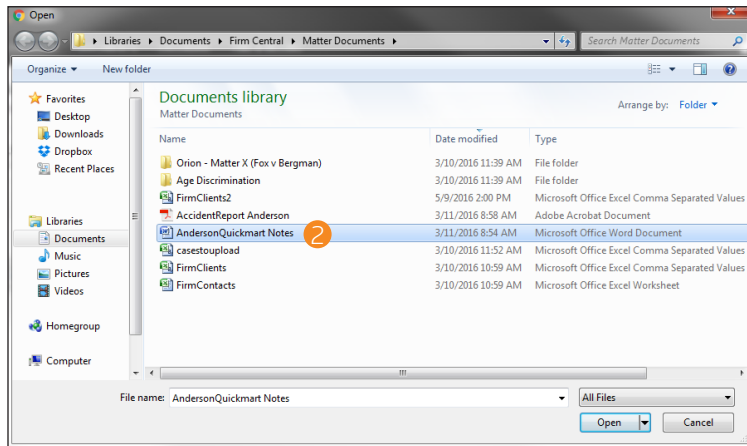
- 1 To share a document or form you have already created for or uploaded to the matter, click the **Share an Existing Document** button.
- 2 An upload window will appear. Find and select the document you want to share with your client and click **Share**.
- 3 The **Share with Client** window will appear. Enter the client's email address in the field underneath his or her name.
- 4 Optionally, click the **+CC** or **+BCC** links to cc or bcc additional people in the email that will be sent to your client. You can also enter a supplemental **Email Message**.
- 5 Click **Send email**. Your client will receive an email notifying them of the upload.



Upload and Share a New Document or Form

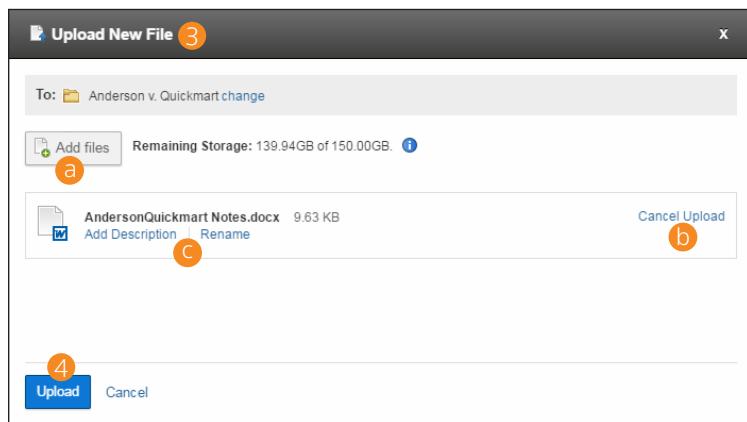


1 To share a document or form to the Client Portal that is not already present on the matter page, click the **Upload a Document** button.



2 Select the documents you want to upload to your matter and then click **Open**.

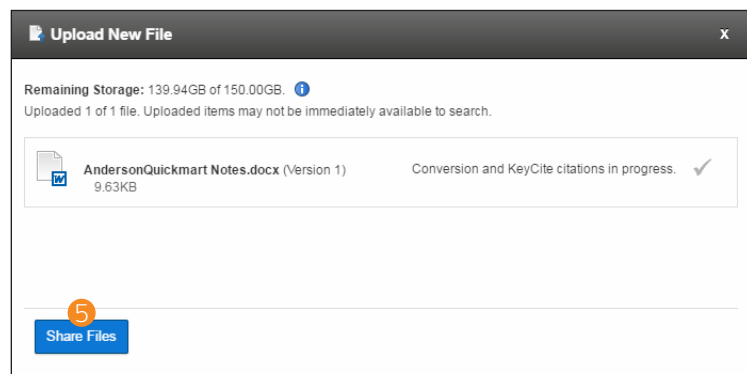
Note: To select documents that are in a row, click the first document, hold down the Shift key, and then click the last document. If the documents are not in a row, click the first document, hold down the Ctrl key, and then click each additional document.



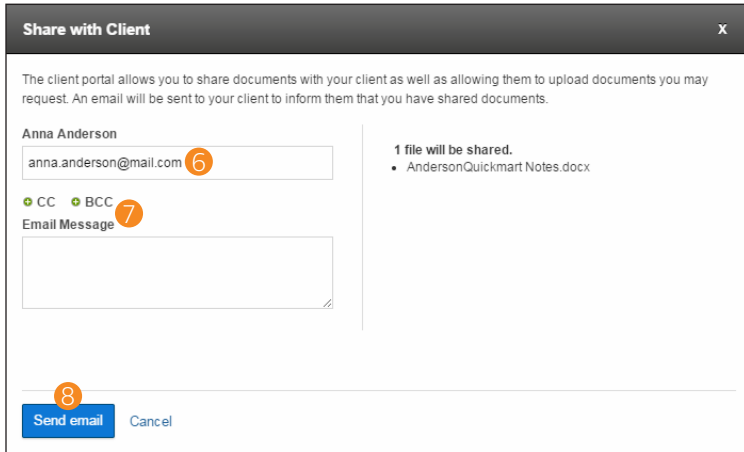
3 The documents are displayed on the Upload New File window.

- a. Upload additional files by clicking **Add Files** and accessing the files. This is useful if you want to upload files from a different folder.
- b. If the list contains a file you do not want to upload, click **Cancel Upload** to delete it from the File Upload page.
- c. On this page, you can also rename and add a description for each file.

4 Click **Upload**.

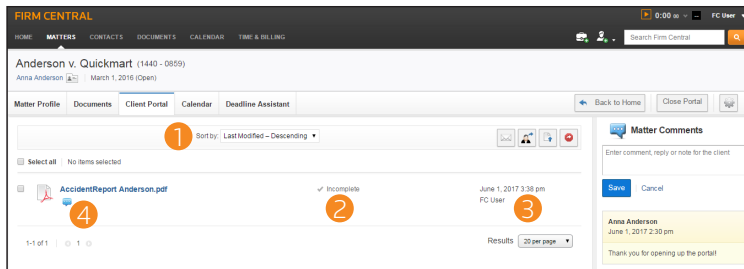


5 Firm Central shows the progress of your files uploading to the Client Portal. As Firm Central uploads your documents, it applies indexing technology from Westlaw to add KeyCite® status flags to your cited authority and links to the full-text documents on Westlaw. You need a subscription to Westlaw to access KeyCite® and the full text of your cited references. Click **Share Files** to continue.



- 6 The Share with Client window will appear. Enter or confirm the client’s email address in the field underneath his or her name.
- 7 Optionally, click the +CC or +BCC buttons to cc or bcc additional people in the email that will be sent to your client. You can also enter a supplemental *Email Message*.
- 8 Click **Send email**. Your client will receive an email informing them the file has been shared.

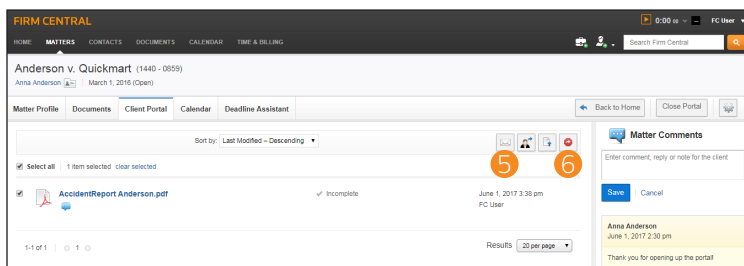
Viewing Documents in Client Portal



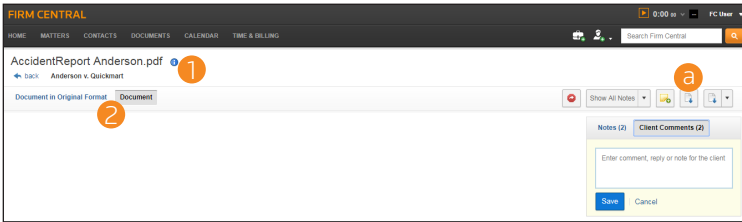
THE DOCUMENT LIST

Once you have uploaded documents to the Client Portal, they will appear in the subtab.

- 1 Click on the **Sort by** drop-down menu to sort documents by title, status, last modified, or date added in either ascending or descending order.
 - 2 Documents are marked as either Complete or Incomplete, depending on whether your client has read the document.
- Note:** Documents are not marked Complete if the client simply opens the document. They must signify they have read them by clicking **Mark as Read** in the Firm Portal.
- 3 The time stamp of a document in the Client Portal signifies the last upload of the document as well as the name of the uploader.
 - 4 If any comments were made on the document, the Comment icon appears below the document title. Click the document link to view it in the **Client Comments** section of the document page.



- 5 Click the **Resend Invite Email** button to resend the invitation email to the Client Portal.
- 6 To remove a document from the Client Portal, first select the document by clicking the check box preceding the document titles and click the **Stop Sharing Selected Items** button.
 - a. All Client Comments will be retained in the document and can be viewed in the Documents subtab of the matter page.

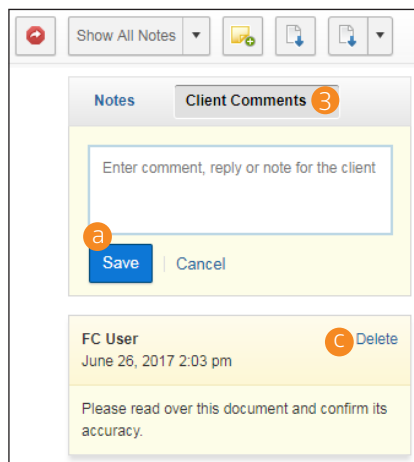


VIEWING A DOCUMENT

When you click on a document in the Client Portal, it is available to view within Firm Central.

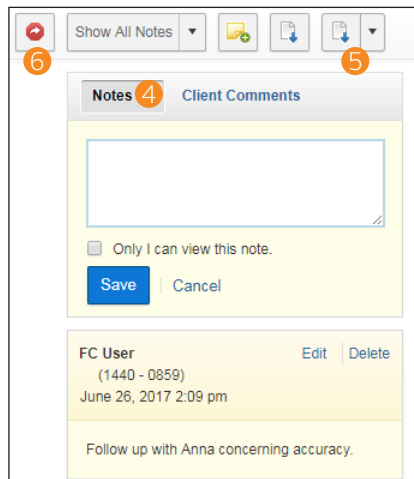
- 1 Click the **i** icon (i) next to the document title to view the document history.
- 2 If the document is a PDF, you can view it as a PDF or as a transcription in Firm Central by toggling between the **Document in Original Format** and **Document** buttons.
 - a. To see the full document in its original format, click on the **Open in Native Format** icon in the toolbar.

Note: If you toggle to the original format or view the native format of the document, Notes and Client Comments will not be visible.



- 3 To add Client Comments to the document, toggle from the **Notes** section to the **Client Comments** section. Your client will be able to view these comments on the document in their Firm Portal.
 - a. Type the comment in the field. Click **Save** when you are finished. It will appear directly below the Client Comment form.
 - b. Your client can also add comments, and they will appear in this area, as well. The most recent comments are at the top.
 - c. To delete a comment, click **Delete**. You can only delete comments you have created.

Note: Client Comments is not an instant messaging system. The page must be reloaded to view comments that have been added by the other party while you are on the Client Portal.



- 4 There is also an option to add and view document notes. These will not be visible to your client through the Client Portal.
- 5 Click the **Delivery** button to print or email the document to others with or without annotations. You can also send to Case Notebook using this button.
- 6 Click the **Stop Share** button to remove the document from the Client Portal.

Notifications

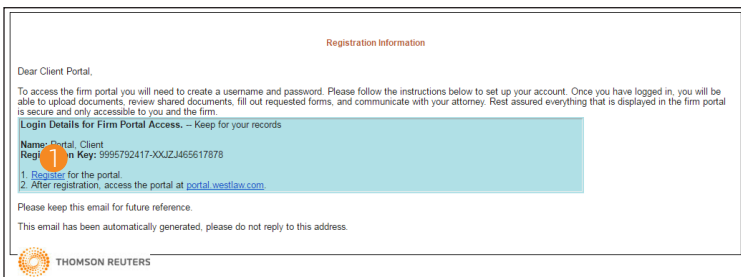
On the Firm Central home page, you will be notified of the following Client Portal actions in the Notifications widget:

- The opening or closing of the Client Portal by another matter team member.
- A document has been shared by your client or another matter team member.
- A Client Comment or Matter Message has been added to a document or matter by your client or another matter team member.
- A document has been marked **Complete** or **Incomplete** by your client.
- Another matter team member stopped the sharing of a document.

Notifications will also appear in the Client Portal widget on the Matter Profile subtab if a client uploads a document, adds a comment to a document or matter, or marks a document as Complete.

Client View of the Firm Portal

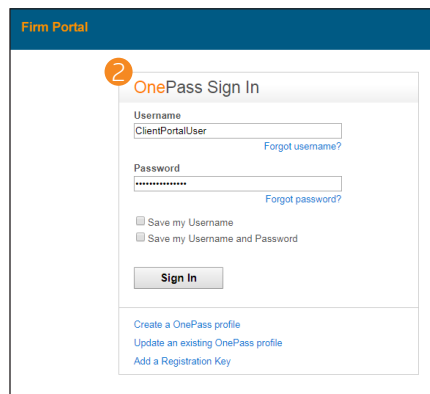
One of the main benefits of the Client Portal is the ease of use and access that is available to your clients. On the Firm Portal, the client-facing side of the Client Portal, your clients can read documents and add comments, complete forms, send secure messages, and upload their own documents. The Firm Portal is available at portal.westlaw.com.



GETTING STARTED

Once you open the portal for your client, he or she will receive an email message informing them of its opening, with an invitation to register for a OnePass account in order to access it.

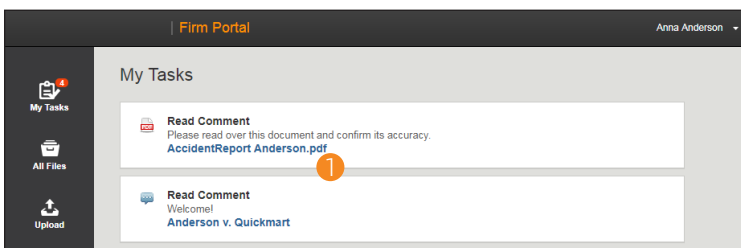
- 1 Your client will click **Register**, loading a page where he or she will enter the information necessary for a OnePass account.
- 2 Once your client has created a OnePass account, the Firm Portal can be accessed at portal.westlaw.com.

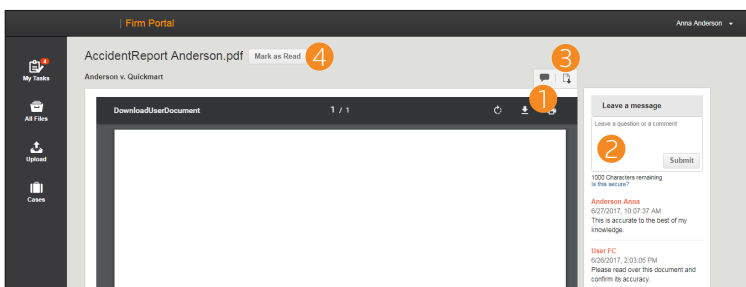


MY TASKS

The default Home page of the Firm Portal is the My Tasks tab. This tab displays any updates for matters your client is involved in.

- 1 Click a file name to review it and complete the task, whether that is reading a comment, reviewing a document, or completing a form.





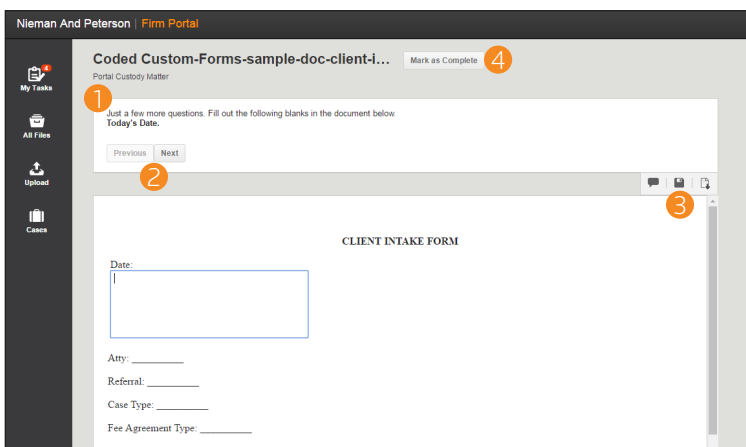
Documents

- 1 Click the **Expand/Collapse Comments** button to view the comments for this document.
- 2 Use the *Leave a message* field to add a comment to this document. Click **Submit** to send it.
Note: Client Comments is not an instant messaging system. The page must be reloaded to view comments that have been added by the other party while you are on the Client Portal.
- 3 Click the **Download Form** button to download this form to your device.
- 4 Once your client has finished reviewing the document, they will click the **Mark as Read** button to signify this. It will also be removed from the My Tasks queue.

Forms

Your client can also fill out forms through the Firm Portal.

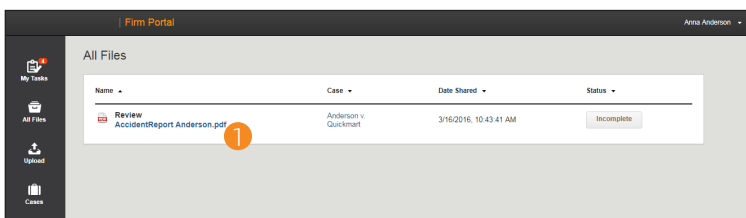
- 1 Follow the instructions to fill out the form correctly.
- 2 Use the **Next** and **Previous** buttons to navigate.
- 3 Click the **Save** button to save a copy to the Firm Portal.
- 4 Once your client has finished completing the form, he or she will click the **Mark as Read** button to signify this. It will also be removed from the My Tasks queue.

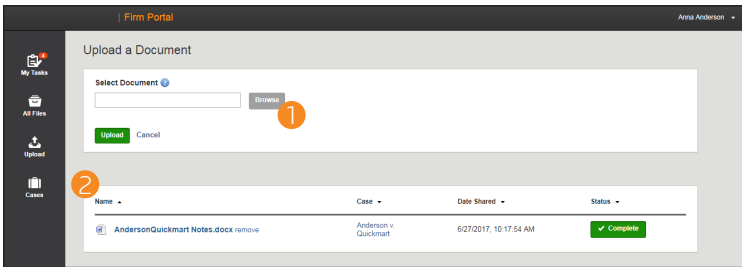


ALL FILES

The All Files tab displays a list of all documents in the Firm Portal as well as their status.

- 1 Click a document link to view that document.





UPLOAD A DOCUMENT

Your client can upload documents of his or her own using the Upload tab.

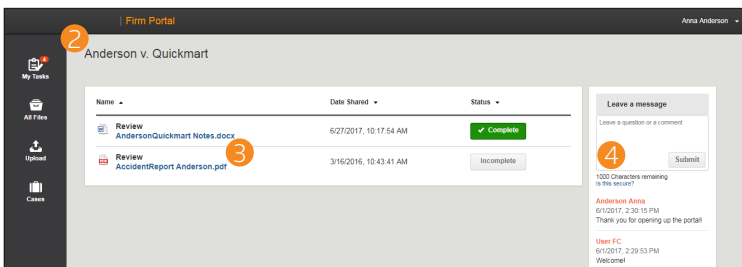
- 1 Click the **Browse** button to find the appropriate file and then click the **Upload** button.
- 2 The table displays each file your client has uploaded as well as its upload status.

CASES

Your client can view all matters he or she is involved with on the Cases tab.



- 1 Hover over the Cases tab button to view a list of matters. Click a matter name to view it.

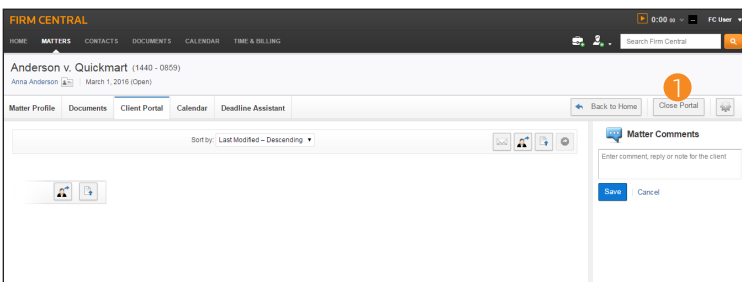


- 2 The matter page displays a list of all documents associated with the matter as well as their status.
- 3 Click a document link to view it.
- 4 The right column displays all messages for the matter. Use the *Leave a message* field to add a message to this matter. Click **Submit** to send it.

Note: Matter Messages is not an instant messaging system. The page must be reloaded to view comments that have been added by the other party while you are on the Client Portal.

Close the Client Portal

Once you have opened the Client Portal, you can close it again to discontinue sharing documents and comments with your client. You may reopen the Client Portal at any time.



- 1 To discontinue sharing documents and comments with your client, click **Close Portal**. A confirmation message will appear. Click **OK**, and the Portal will close. Your client will receive an email notifying them of the closure.

LOOKING FOR MORE INFORMATION?

For assistance using Firm Central, call 1-888-287-8537

For free reference materials, visit <http://legalsolutions.thomsonreuters.com/law-products/solutions/firm-central/support>

