

# Firm Central

## Exporting and downloading data

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### User guide

**As a law firm leaving Firm Central**, it is imperative that the data be exported and downloaded BEFORE the subscription lapses. Once the subscription is lapsed, some data will no longer be available. For more information on exporting data from a lapsed Firm Central, please refer to Page 29 in this document under the section titled "Exporting Data from a Lapsed Firm Central."

We recommend you first export or download a list of all clients and cases.

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## Exporting Clients and Contacts

To export the client and contact list:

1. Select "Contacts" from the main menu.
2. Then select "All Contacts". Note: you do not need to click the "Select All" box – leaving this unclicked will allow you to download all Clients and Contacts, including any that are inactive.
3. Click on the "Export" icon in the upper right corner. This will begin the export of your Client list to a .CSV file.

The screenshot displays the Firm Central web application interface. The top navigation bar includes links for HOME, MATTERS, CONTACTS, DOCUMENTS, CALENDAR, TIME & BILLING, ACCOUNTING, and REPORTING. The 'CONTACTS' tab is active. Below the navigation bar, there are tabs for 'All Contacts', 'Clients', and 'Client Groups'. The 'All Contacts' tab is selected. On the left sidebar, under 'CONTACT TYPE', there are checkboxes for 'Person (83)' and 'Business (69)'. The 'All Contacts' tab is highlighted with a red box and an arrow labeled '2'. The main content area shows a list of contacts with columns A through Z. The first contact is 'AAA', Role: Vendor. The 'Export' icon (a downward arrow) is located in the top right corner of the contact list, highlighted with a red box and an arrow labeled '3'. The 'CONTACTS' link in the main menu is highlighted with a red box and an arrow labeled '1'.

## Exporting Matters

To export Matters:

1. Select "Matters" from the main menu.
2. Select "All Matters".
3. Make sure both Open and Closed Matters are selected.
4. Click on the Export icon in the upper right corner. This will begin the export of your Matter list to a .CSV file.

The screenshot shows the Firm Central interface with the 'Matters' menu item selected in the top navigation bar (callout 1). Below the navigation bar, the 'All Matters' tab is active (callout 2). On the left sidebar, the 'OPEN/CLOSED' filter has both 'Closed (5)' and 'Open (119)' checked (callout 3). In the top right corner of the main content area, the 'Export' icon (a document with a download arrow) is highlighted with a callout 4. The main content area displays a table of matters with columns for checkboxes, matter names, IDs, descriptions, and status/dates.

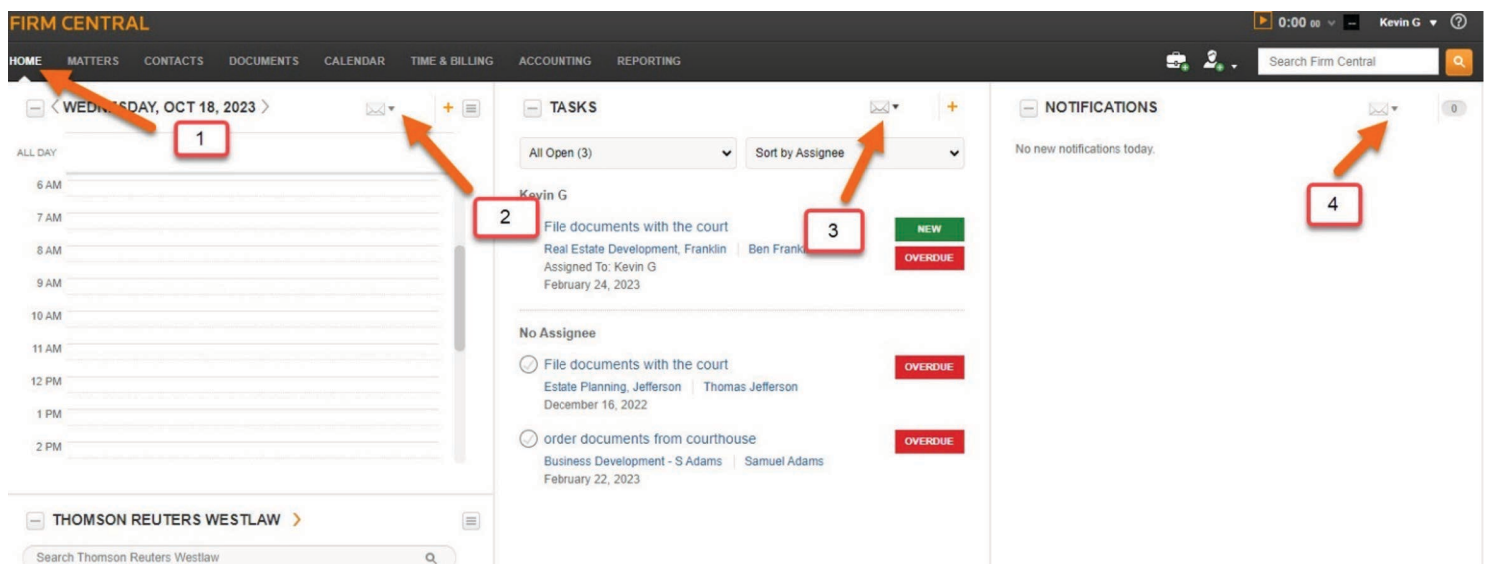
Check	Matter Name	ID	Description	Status/Date
<input type="checkbox"/>	123 First St. Sale	0126	Litigation, Larry	CLOSED May 22, 2019 - October 18, 2023
<input type="checkbox"/>	Somo Ave	100	Ropella, Andrea	OPEN January 17, 2019
<input type="checkbox"/>	15335 9901 Example Street	0096	Groundbreaker Properties	CLOSED February 1, 2019 - September 13, 2021
<input type="checkbox"/>	Abilene v. IHS Inc.	0054	Abilene, Joseph	OPEN January 23, 2019
<input type="checkbox"/>	Abilene v. IOC Inc.	0110	Abilene, Joseph	OPEN April 16, 2019
<input type="checkbox"/>	Accounting Matter	0080	Calendar, Roman	OPEN



## Export data from the Home Page

From the Firm Central Home Page, you can export data from the Calendar, Tasks, and Notifications widgets.

1. Select "Home" from the main menu.
2. **To export Calendar data:** click on the icon to email or print data. This process is the same as outlined in the section on exporting Calendar (see page 11)
3. **To export Task data:** click on the icon to email or print data. You can select "Export Completed Tasks" from the drop-down menus as well.
4. **To export Notifications data:** click on the icon to email or print data. When printing data, most printers support the choice to "Print to PDF." We recommend using this method to create and save a digital copy.

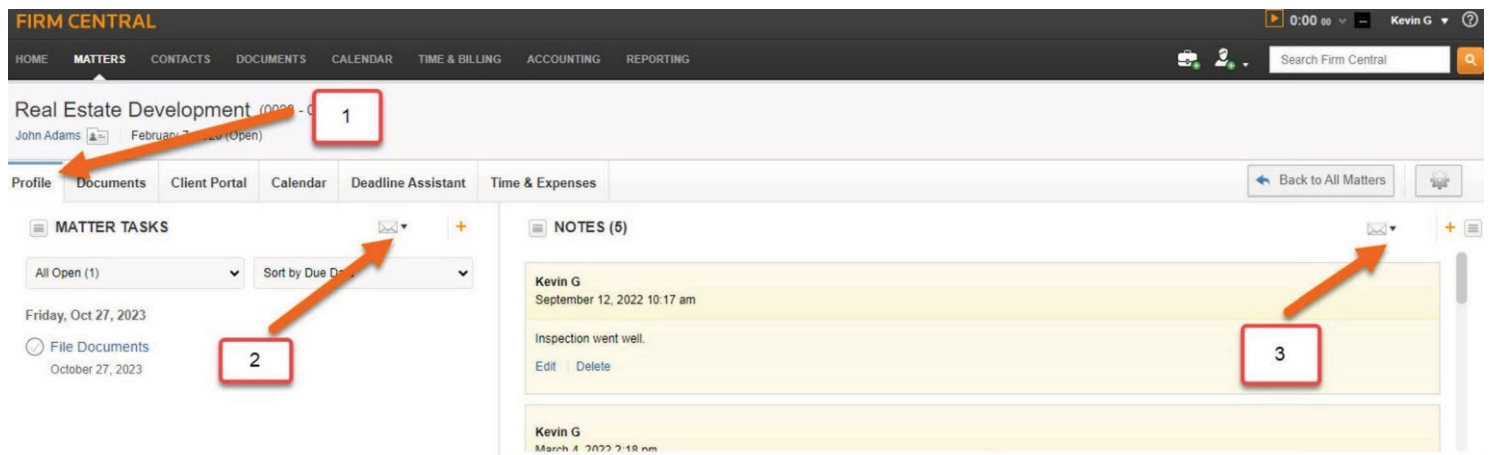


## Export data from within a specific Matter

Data can also be exported or downloaded from within a specific Matter. To export this data, you will need to go into each Matter separately.

### From the Profile Tab:

1. Click on the "Profile" Tab within the Matter.
2. **To export Matter Tasks:** click on the icon to email or print data.
3. **To export Notes:** click on the icon to email or print data. Most printers allow the choice to print to PDF to download the information.



## Export data from within a specific Matter

Data can also be exported or downloaded from within a specific Matter. To export this data, you will need to go into each Matter separately.

### From the Documents Tab:

Please refer to the Exporting Documents section (see Page 9).

### From Client Portal Tab:

If you have uploaded documents to the Client Portal, please refer to the Exporting Documents section (Page 9), as the process is the same. Otherwise, you are not able to download documents directly from the Client Portal page. Also, you are not able to export messages from the Client Portal.

### From the Calendar Tab:

Please refer to the Exporting Calendar Events section (see Page 11).

### From the Deadline Assistant Tab:

For customers with the Deadline Assistant program, you can download the Events from the Calendar within the Matter. As an alternative, you can download the Directory of Events from the Deadline Assistant Tab by following these steps:

1. Select the "Deadline Assistant" tab within the Matter.
2. Click on the Export icon or down arrow and select the date range and file type to download.

**FIRM CENTRAL** 0:00 Kevin G

HOME MATTERS CONTACTS DOCUMENTS CALENDAR TIME & BILLING ACCOUNTING REPORTING

Real Estate Development (0028 - 0182)  
John Adams February 7, 2020 (Open)

Profile Documents Client Portal Calendar **Deadline Assistant** Time & Expenses

Directory of Events

Rules Updates + New Event [Export Icon]

Event Name	Rules Authority	Event Date	Last Updated
Trial of matter.	MN ST RCP Rule 39	December 6, 2023	October 18, 2023 Kevin G
L/D to make expert disclosures.	MN ST RCP Rule 26.01(b)(4)(A)	September 7, 2023	October 18, 2023 Kevin G
L/D to disclose witness and exhibit information.	MN ST RCP Rule 26.01(c)(2)	November 6, 2023	October 18, 2023 Kevin G
L/D to serve an offer of judgment (by mail).	MN ST RCP Rule 68.01(e) MN ST RCP Rule 68.01(a)	November 16, 2023	October 18, 2023 Kevin G
Deadline to serve an offer of judgment (by hand, fax or electronically before 5:00 p.m.).	MN ST RCP Rule 68.01(a)	November 21, 2023	October 18, 2023 Kevin G

**From the Time and Expense Tab:**

For customers with the Time & Billing module, you can download all Time and Expenses for the specific matter by following these steps:

1. Select the "Time & Expense" tab within the Matter.
2. Select the specific User or all Users.
3. Select all time and expenses, just time, or just expenses.
4. Select a date range (optional).
5. If you wish to include billed time, check the box to include billed time.
6. Click the Export icon or down arrow to export the data to a .CSV file.

**FIRM CENTRAL**

HOME MATTERS CONTACTS DOCUMENTS CALENDAR TIME & BILLING ACCO/NTING REPORTING

Real Estate Development (0028 - 0182)  
John Adams | February 7, 2020 (Open)

Profile Documents Client Portal Calendar Deadline Assistant **Time & Expenses** Back to Home

Matter Time & Expenses Total \$3,777.08

All Users

View: Time & Expense Entries

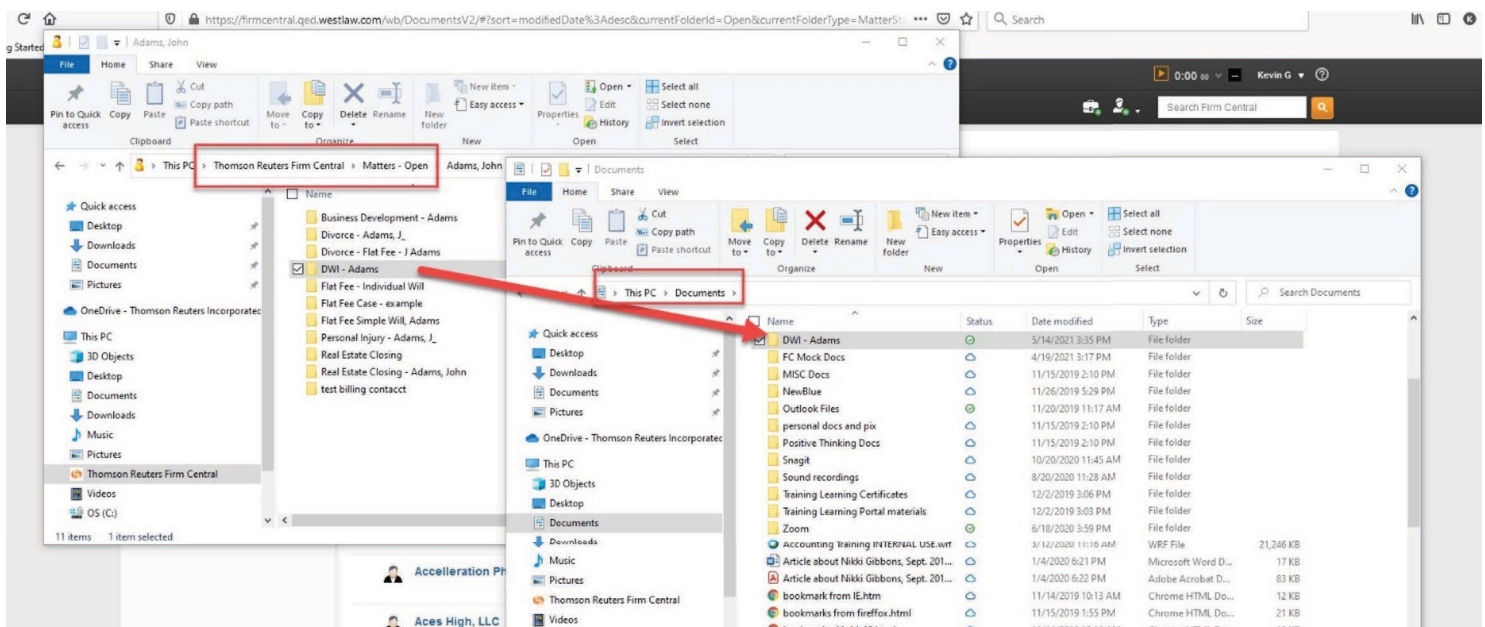
Date Range: 10/18/2022 to 07/31/2023 ☒ Include Billed

Reset + Time Entry

Date	User	Entry Type	Description	Notes	Taxable	Cost x Quantity	Rate x Time	Total	Status
03/10/2023	Kevin G	Time	Research on land documents and legal description.				\$350.00/hr 1.40hr	\$490.00	Billed 1431
03/01/2023	Kevin G	Time	Research and review				\$350.00/hr 1.50hr	\$525.00	Billed 1431
03/01/2023	Kevin G	Time	Carry Over Balance				\$1,152.08 Flat 1.00hr	\$1,152.08	Billed 1431
02/13/2023	Kevin G	Time	Call with commission of lands				\$350.00/hr 1.50hr	\$525.00	Billed 1423

## Exporting Documents

Windows File Explorer is the best method to download your documents. To use this feature, you need to have the Desktop App installed. With this, you can open two file explorers and copy or drag-and-drop from one (Firm Central) to another (your own computer). In this case, you will need to manually drill down to the Matter and copy that folder. However, you can copy entire folders, which will include sub folders and files. If you have many files that need to be exported from Firm Central to your machine, we recommend that you export them in chunks (e.g., 100-to-200 at a time), rather than all of them at once. Please note that the Desktop App is only available for PC computers.



If you do not have the Desktop Software installed, you can click on this link to download and install. Please note, this software is only compatible with a Windows computer.

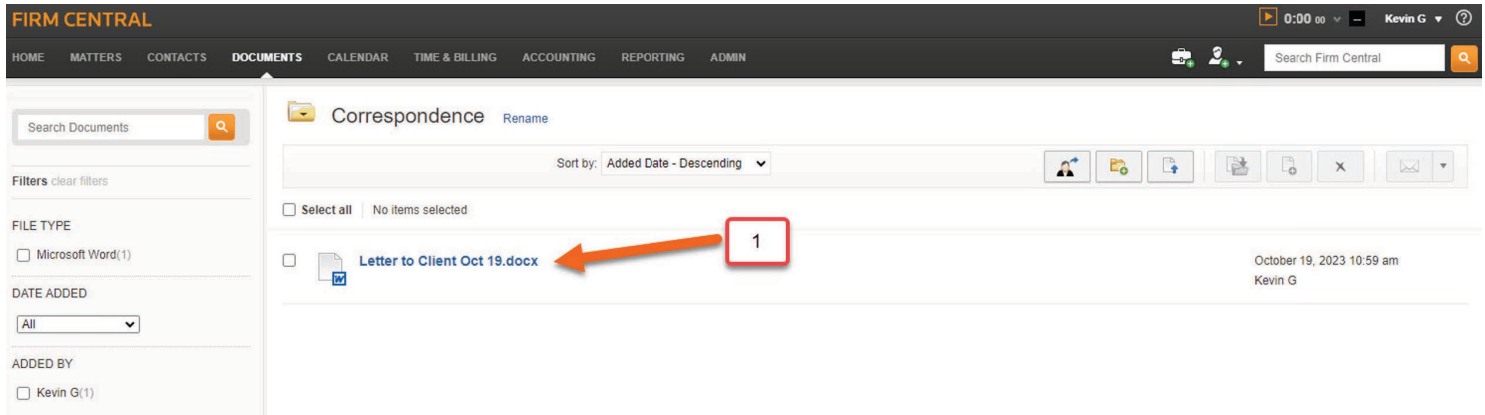
<http://info.legalsolutions.thomsonreuters.com/software/firm-central/>

Also, here is a help video with step-by-step instructions to download and install the Desktop Software:

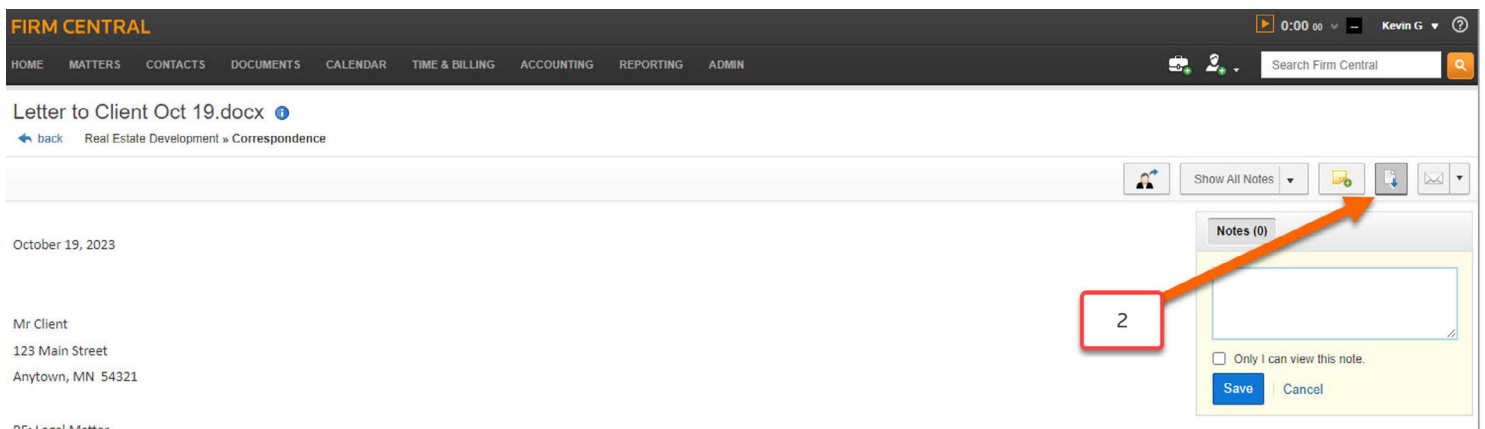
<https://answers.legalprof.thomsonreuters.com/firm-central/tx4han2wuet7fah5sri5>

### The alternate way to download a document is within Firm Central:

1. Select the individual document by clicking on the document name highlighted in blue.



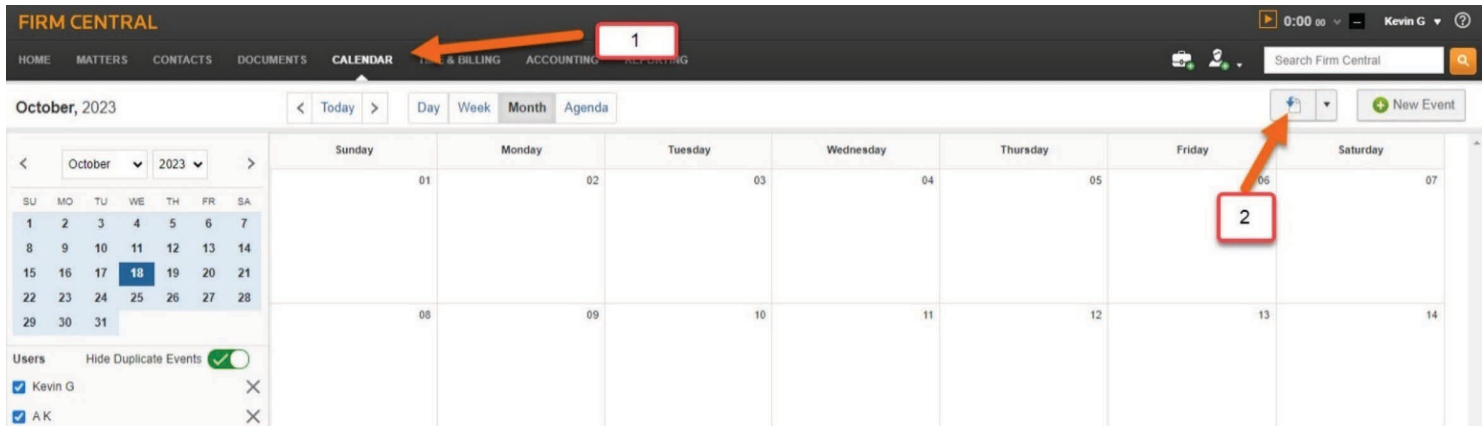
2. In the upper right corner click on the Export icon. Your document will be downloaded in its original format.



## Exporting Calendar Events

To export Calendar Events:

1. Select "Calendar" from the main menu.
2. In the upper right corner, click on the Export button.



3. A pop-up window will appear with options.
4. You can select a date range to export along with which types of Events and files.

Download
X

Choose options below for delivering events.

Calendar filters will be applied to delivered results.

Which dates do you want to include?

☒ Events within the next year  
☐ Dates between (limited to 365 days)  
 and

Which events do you want to include?

What format do you want to receive?

Deliver As

Download Cancel

You can only export 365 days at a time. Depending on how long you have used the Firm Central calendar, you may need to run multiple exports. You can run the export in different file types; however, you should export at least one as a .CSV file, since most practice management software import/exports require .CSV files. This will allow you to import your Calendar data into another practice management system, provided it's supported.

## Time & Billing

For customers with Time & Billing, it is strongly recommended to generate invoices for all unbilled time and expenses. All Pre-Bills should be generated into Invoices. We will go through each tab starting with the Time Entry Tab.

### Time Entry Tab:

1. Select "Time & Billing" from the main menu.
2. Select the "Time Entry" Tab.
3. Select the User. Please note, you can only select one User at a time.
4. Select either "Day" or "Week". You can click into the calendar to go to a previous week.
5. Click the Export icon or down arrow to export the data to a .CSV file.

**FIRM CENTRAL** 0:00 00 Kevin G

HOME MATTERS CONTACTS DOCUMENTS CALENDAR **TIME & BILLING** ACCOUNTING REPORT

Time Entry Expense Entry Pre-Bills Payment & Invoices Trusts & Retainers All Accounts

Time Entry 5.30 \$1,015.00 Weekly Total

G, Kevin

Oct 15 - Oct 21, 2023 Go < Today > Day Week

Export icon (down arrow) + Time Entry Save

Client / Matter *	External Narrative	Sun Oct 15	Mon Oct 16	Tue Oct 17	Wed Oct 18	Thu Oct 19	Fri Oct 20	Sat Oct 21	Hours	Details	Total
ABC Corporation	Meeting with client.			2.40					2.40	Activity / Task	
Contingency law suit										Cont. / Task	
Franklin, Ben	Reviewed contract documents.		1.50						1.50	Activity / Task	\$525.00
Contract Review										\$350.00 / Task	
Adams, John	Telephone Call with Client		1.40						1.40	Activity / Task	\$490.00
Insurance										\$350.00 / Task	



**Expense Entry Tab:**

Follow these steps to export expense data:

1. Select "Time & Billing" from the main menu.
2. Select "Expense Entry" Tab.
3. Select the User.
4. Select the date range. Please note, the expense date range is one week. You can click into the calendar to back date to previous weeks.
5. Click the Export icon or down arrow to export the data to a .CSV file.

The screenshot shows the Firm Central interface with the following elements and callouts:

- Callout 1:** Points to the "TIME & BILLING" tab in the top navigation bar.
- Callout 2:** Points to the "Expense Entry" sub-tab in the left sidebar.
- Callout 3:** Points to the user selection dropdown menu showing "G, Kevin".
- Callout 4:** Points to the date range selector showing "Oct 15 - Oct 21, 2023".
- Callout 5:** Points to the export icon (a document with a download arrow) located next to the "+ Expense" and "Save" buttons.

The main content area displays a table of expense entries:

Date	Client / Matter *	External Narrative	Code	Total (\$)	Non-Billable	Taxable	Request Check	Details
TUE, OCT 17	ABC Corporation	Ordered documents.	<a href="#">Expense Code</a> <a href="#">1 x \$55.00</a>	55.00	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Request Check</a>	

The total amount for the selected period is \$55.00.

**Pre-Bill Tab:**

A list of your Pre-Bills can be downloaded by following these steps:

1. Select the "Time & Billing" Tab from the main menu.
2. Select the "Pre-Bills" Tab.
3. Click on the "All Matters" box.
4. Enter your desired date range and click the "Generate Pre-Bills" button.
5. Once the Pre-Bills are generated, select the Pre-Bills you want to print or click the box to select all.
6. Click on the Export icon or down arrow.
7. Select "Download".

The screenshot shows the Firm Central interface with the following elements and callouts:

- 1**: Points to the **TIME & BILLING** tab in the top navigation bar.
- 2**: Points to the **Pre-Bills** sub-tab in the left sidebar.
- 3**: Points to the **Generate Pre-Bills** button.
- 4**: Points to the **Search Pre-Bills** input field.
- 5**: Points to the checkbox in the first column of the Pre-Bills table.
- 6**: Points to the export icon (downward arrow) in the top right of the table.
- 7**: Points to the **Download** option in the export dropdown menu.

**Pre-Bills Table Data:**

Generated Date	Start	End	Lead	Client	Matter	Matter ID	Total	Status
10/18/2023	10/09/2023	10/18/2023	KG	Franklin, Ben	Contract Review	0036	\$555.00	Pre-Bill
10/18/2023	10/09/2023	10/18/2023		ABC Corporation	Contingency law suit		\$0.00	Pre-Bill
10/18/2023	10/09/2023	10/18/2023		Adams, John	Insurance	0130	\$490.00	Pre-Bill
09/12/2023	09/05/2023	09/12/2023	KG	Jones, Tom	Estate Planning	0158	\$431.00	Pre-Bill

After selecting "Download" a pop-up window will appear with options to download (all) Pre-Bills or just a list of the Pre-Bills. By selecting "Download Pre-Bills" you will then be prompted to select a delivery method as a Single File or Multiple Files (Zip file download). If you select the list, it will be in one PDF document with a summary of the Pre-Bills.

**Download** X

**Pre-Bills Selected (4)**

Select Content to Download

☒ Download Pre-Bills

☐ Download List of Pre-Bills

File Name\*

Firm Central 4 Pre-Bill List

Format

PDF

Deliver As

☒ Single File

☐ Multiple Files (Zip)

Download

Cancel

**Payment and Invoices Tab:**

To download invoices, follow these steps:

1. Select the "Time & Billing" Tab from the main menu.
2. Select the "Payment & Invoices" Tab.
3. Search for a specific client or matter (optional).
4. Apply a date range (optional).
5. The "Filter" drop down menu supplies the choice to download all invoices, including Paid in Full and Voided invoices.
6. Click on the Export or down arrow button. You will see three options: Print, Download, or Export. When selecting "Download" it will download the invoices as PDFs. You'll have the option to download a summary list or each invoice either as one PDF file or a ZIP file containing each invoice summary of the invoice data will export to a .CSV file.

Please note: under "Reporting" you can download reports that will detail invoice time and expense entries.

**FIRM CENTRAL**

HOME MATTERS CONTACTS DOCUMENTS CALENDAR **TIME & BILLING** ACCOUNTING REPORTING

Time Entry Expense Entry Pre-Bills **Payment & Invoices** Trusts & Retainers All Accounts

Apply Payment

Invoice Number \* Payment Date \*  
 Enter number 10/18/2023

Payment Amount \* Payment Type \*  
 \$

Payor/Payee  
 Enter a contact

Description  
 Notes to yourself and team

Apply Payment Cancel

**Invoices**

Search Invoices Date range to Filter 2 selections

- ☐ All Invoices
- ☒ Overdue
- ☐ Paid in Full
- ☒ Unpaid/Partial
- ☐ Voided

	Date	Invoice #	Lead	Client	Matter ID	Send By	Amount	Paid	Due	Status
<input type="checkbox"/>	09/06/2023	<a href="#">1440</a>	KG	Franklin, Ben	0036		\$500.00	\$0.00	\$500.00	OVERDUE
<input type="checkbox"/>	09/06/2023	<a href="#">1439</a>	KG	Franklin, Ben	0028	✓	\$161.00	\$0.00	\$161.00	OVERDUE
Total							\$661.00	\$0.00	\$661.00	

Showing 1 to 2 of 2 entries 1

Show 20 entries

**Trusts & Retainers Tab:**

To export data from the Trusts & Retainers Tab:

1. Select the "Time & Billing" Tab from the main menu.
2. Select the "Trusts & Retainers" Tab.
3. Select an individual Client or Matter by entering the name in the search box.
4. Select a specific account type or select all accounts.
5. Include closed accounts (optional).
6. Select individual accounts or all accounts (you do not have to make any selections if you want all accounts).
7. Once your selections have been made, click on the Export icon or down arrow. When selecting "Download" it will download the account activity as PDFs. You'll have the option to download each single account either as one PDF or a ZIP file containing each account as a PDF. If you select the choice to "Export", a summary of the invoice data will export to a .CSV file.

**FIRM CENTRAL**

HOME MATTERS CONTACTS DOCUMENTS CALENDAR **TIME & BILLING** ACCOUNTING REPORTING

Time Entry Expense Entry Pre-Bills Payment & Invoices **Trusts & Retainers** Accounts

Trusts & Retainers

Search Accounts Filter by: All Account types (81) ☐ Include Closed Accounts

Balance **\$2,735,065.20**

<input type="checkbox"/>	Account Name	Client	Matter	Matter ID	Lead	Account Type	Balance
<input type="checkbox"/>	<a href="#">Jerry Judgment - Trust Account</a>	Abilene Apartments	Jerry Judgment	0164		Matter Trust Account	\$8,545.00
<input type="checkbox"/>	<a href="#">Abilene v. IHS Inc. - Trust Account</a>	Abilene, Joseph	Abilene v. IHS Inc.	0054		Matter Trust Account	\$877,215.06
<input type="checkbox"/>	<a href="#">Joseph Abilene v. IHS Inc. - Trust Account</a>	Abilene, Joseph				Client Pre-payment	\$550.00
<input type="checkbox"/>	<a href="#">Real Estate Development - IOLTA</a>	Acme Corp	Real Estate	0072		Matter Retainer	\$149,100.00
<input type="checkbox"/>	<a href="#">Real Estate Development - IOLTA</a>	Adams, John	Real Estate Development	0182		Matter IOLTA	\$371.12
<input type="checkbox"/>	<a href="#">Sept Real Estate Closing - Adams - Trust Account</a>	Adams, John	Sept Real Estate Closing - Adams	0240		Matter Trust Account	\$0.00
<input type="checkbox"/>	<a href="#">Business Development - Flat Fee - Trust Account</a>	Adams, John	Business Development - Flat Fee	0194		Matter Trust Account	\$3,000.00
<input type="checkbox"/>	<a href="#">Real Estate Development - IOLTA</a>	Adams, John	Real Estate Development	0182		Matter Trust Account	\$0.00
<input type="checkbox"/>	<a href="#">Power of Attorney - Trust Account</a>	Adams, John	Power of Attorney	123456789		Matter Trust Account	\$1,844.00
<input type="checkbox"/>	<a href="#">Sept Real Estate Closing - Adams - Real Estate</a>	Adams, John	Sept Real Estate Closing - Adams	0240		Matter Real Estate Transa...	\$147,250.00
<input type="checkbox"/>	<a href="#">Trust Example - Trust Account</a>	Adams, John	Trust Example	0212		Matter Trust Account	\$330.00
<input type="checkbox"/>	<a href="#">Business Development - S Adams - IOLTA</a>	Adams, Samuel	Business Development - S Adams	0248		Matter IOLTA	\$10,328.00

**All Accounts Tab:**

"All Accounts" supplies an account summary for each Matter. The data can be downloaded in similar way to the trust account data.

1. Select the "Time & Billing" Tab from the main menu.
2. Select the "All Accounts" Tab.
3. Select an individual Client or Matter by entering the name in the search box.
4. Include Matters with a zero balance (optional).
5. Select individual accounts or all accounts. Note: you do not have to make any selections if you want all accounts.
6. Once your selections have been made, click on the Export icon or down arrow. When selecting "Download" it will download the account activity as PDFs. You'll have the option to download each single account either as one PDF or a ZIP file containing each account as a PDF. If you select the choice to "Export", a summary of the invoice data will export to a .CSV file.

The screenshot shows the Firm Central interface with the 'All Accounts' tab selected. The interface includes a top navigation bar with tabs like HOME, MATTERS, CONTACTS, DOCUMENTS, CALENDAR, TIME & BILLING, ACCOUNTING, and REPORTING. Below this is a sub-menu with options like Time Entry, Expense Entry, Pre-Bills, Payment & Invoices, Trusts & Retainers, and All Accounts. The 'All Accounts' tab is active, showing a search bar, a checkbox for 'Include open matters with zero balances', and a table of account summaries. The table has columns for Client, Matter, Matter ID, Lead, Matter Balance, and Account Summary. The total outstanding balance is \$661.00. Numbered callouts indicate the following steps:

1. Select the "Time & Billing" Tab from the main menu.
2. Select the "All Accounts" Tab.
3. Select an individual Client or Matter by entering the name in the search box.
4. Include Matters with a zero balance (optional).
5. Select individual accounts or all accounts.
6. Click on the Export icon or down arrow.

Client	Matter	Matter ID	Lead	Matter Balance	Account Summary
Abu, Apartments	Jerry Judgment	0164		\$0.00	\$8,545.00
Abilene, Joseph	Abilene v Jones (banana corp)	0232		\$0.00	\$550.00
Abilene, Joseph	Abilene v. IHS Inc.	0054		\$0.00	\$877,215.06
Acme Corp	Real Estate	0072		\$0.00	\$149,100.00
Adams, John	Sept Real Estate Closing - Adams	0240		\$0.00	\$147,250.00
Adams, John	Power of Attorney	123456789		\$0.00	\$1,844.00
Adams, John	Real Estate Development	0182		\$0.00	\$371.12
Adams, John	Trust Example	0212		\$0.00	\$330.00
Adams, John	Business Development - Flat Fee	0194		\$0.00	\$3,000.00
Adams, Samuel	Business Development - S Adams	0248		\$0.00	\$10,328.00



## Reporting

From the “Reporting” Tab you can run a series of reports to export data. We recommend you run several, if not all, the reports to capture your data.

1. Select “Reporting” from the main menu.
2. Select the “Reports” Tab.
3. On the left side of the page, you will see the report titles.
4. In the center of the page, you will see the description of each report.
5. The Category column shows the category of the report. Customers with Firm Central Accounting will have six additional report categories to choose from.
6. On the far right of the page you can select “Run” to run the desired report.

The screenshot shows the Firm Central web application interface. At the top is a navigation bar with tabs: HOME, MATTERS, CONTACTS, DOCUMENTS, CALENDAR, TIME & BILLING, ACCOUNTING, and REPORTING. An orange arrow labeled '1' points to the REPORTING tab. Below the navigation bar is a sub-header with 'Dashboard' and 'Reports' tabs. An orange arrow labeled '2' points to the Reports tab. The main content area is titled 'Reports' and contains a table of reports. An orange arrow labeled '3' points to the 'Report' column header. An orange arrow labeled '4' points to the 'Description' column header. An orange arrow labeled '5' points to the 'Category' column header. An orange arrow labeled '6' points to the 'Run' button in the rightmost column. The table lists various reports such as Sales Tax Liability, Account Transactions, Profit & Loss, Trial Balance, Balance Sheet, Vendor Summary, Time by User, Time by Client, Time by Matter, Collection Realization by User, and Write Offs.

Report	Description	Category	Run
<a href="#">Sales Tax Liability</a>	View a list of taxable transactions over a selected date range. Provides a total of the taxable transaction amount as well as a total of the tax liability amount for the selected date range.	Accounting	Run
<a href="#">Account Transactions</a>	View all associated transactions including firm deposits, firm expenses, journal entries, trust transactions, invoice payments or payable payments. View for all accounts or an individual account over a selected date range. Inactive accounts are included by default. Optional ability to also view all distributions for the associated accounts.	Accounting	Run
<a href="#">Profit &amp; Loss</a>	View the firm's profit or loss for the date range selected. View if a profit or loss has been made and identify the account/s which contributed to that profit or loss. Provides a net operating income total as well as a total of the net profit or loss. Net operating income is calculated as the total income subtracted by the total expenses. Inactive accounts are included by default. Optional ability to include zero balances.	Accounting	Run
<a href="#">Trial Balance</a>	View a list of accounts and their balances for a specified date. Provides a total of debits and credits. Inactive accounts are included by default. Optional ability to include accounts with zero balances.	Accounting	Run
<a href="#">Balance Sheet</a>	View a point-in-time statement of the assets, liabilities, and capital of the firm. The total of the Assets and the total of the Liabilities + Equity should always match. Inactive accounts are included by default.	Accounting	Run
<a href="#">Vendor Summary</a>	View a summary of vendor information including status, year-to-date spend, and current balance. The current balance column will always show the current balance due for the vendors regardless of when the report is run. Inactive vendors are included by default.	Accounting	Run
<a href="#">Time by User</a>	View details of all time entries for a single user or all users during a selected period of time. Optional ability to view time entries for inactive/deleted users.	Time and Billing	Run
<a href="#">Time by Client</a>	View details of all time entries for a single client during a selected period of time. Clients which have been marked as inactive are not included as a selection option.	Time and Billing	Run
<a href="#">Time by Matter</a>	View details of all time entries for a single matter during a selected period of time. By default closed matters are included in the selection drop down list.	Time and Billing	Run
<a href="#">Collection Realization by User</a>	View the details of billed, written off, and collected fees with realization rates broken down by invoices for a selected time frame. Will only include invoices on which a payment/collection has been made in the selected date range. The reports can be run for a single user or for all. The amount due column will always show the current amount due for the invoice regardless of the selected date range. For a partial payment the order in which payment is applied to the invoice is taxes, expenses, fees, and finance charges respectively. For a partial write off or credit the order in which the invoice is written off is finance charges, fees, expenses, and taxes. This report does not show payments or adjustments made to finance charges, expenses or taxes. Optional ability to view collection realization for inactive/deleted users.	Time and Billing	Run
<a href="#">Write Offs</a>	View details for any discounts, credits or write offs applied to an invoice over a selected time period, or where a prebill has been entirely written-off. View totals for all clients or select to view for a single client. Clients which have been marked as inactive are not included as a selection option. By default closed matters are included in this report.	Time and Billing	Run
	View the details of billed and collected fees and expenses with realization rates broken down by invoices for a selected timeframe. Only includes invoices where a payment/collection has been made in the selected date range. The report can be run for a single matter, single client or for all. The amount due column will always show the current amount due for the invoice regardless of the selected date range. This report does not show payments or adjustments made to finance charges or		Run

After selecting your report, the report page will load. If the report allows for a date range, date range will default to the previous month. However, depending on the report, you can easily change that with options such as Client, Matter, User, and Date Range. In this example, we have selected the report "Time by User":

1. Select all Users or a specific User.
2. Select a Date Range. Please note that for the report to display on the screen the date range must not exceed 365 days. If the date range exceeds 365 days, you will be prompted to "Download the Report." When you select "Run" you will see a pop-up window informing you the report must be downloaded. Choose the file format and select "Download" to continue. Follow the prompts. If your report is less than 365 days continue to Step 3.
3. From the drop-down menu, select the file type in which you want to export the data. Reports can be exported in several file formats, including .CSV. We recommend at least one format be .CSV file because other report formats do not include information from all the fields (due to limitations in the data field). A .CSV file includes all field information.
4. Once your options have been selected, click on the "Export" button to export, and download your report.

The screenshot shows the 'Time by User' report page in Firm Central. The interface includes a navigation bar at the top with tabs for HOME, MATTERS, CONTACTS, DOCUMENTS, CALENDAR, TIME & BILLING, ACCOUNTING, REPORTING, and ADMIN. The 'REPORTING' tab is active. Below the navigation bar, the 'Time by User' report is displayed. The report has a filter section with a 'User' dropdown set to 'All Users' (callout 1), a 'Date Range' selector showing '09/01/2023' to '09/30/2023' (callout 2), and a 'Run' button (callout 2). Below the filter section, there is a warning message: 'External narratives may be too long to display on some report types. Full narratives are included on csv and excel exports.' To the right of the warning, there is a search bar and a dropdown menu for file formats (callout 3) with options: pdf, xlsx, xls, csv (selected), xml, docx, and pptx. An 'Export' button is also present (callout 4). The main content area displays a table titled 'Time by User' with columns: User, Client, Matter, Matter ID, Matter Status, Lead Attorney, Date, Activity, ABA Task, External Narrative, Billing Type, Billable Hours, Non-Billable Hours, Rate, Billable Fee, and Billed. The table contains three rows of data for user 'G. Kevin'.

User	Client	Matter	Matter ID	Matter Status	Lead Attorney	Date	Activity	ABA Task	External Narrative	Billing Type	Billable Hours	Non-Billable Hours	Rate	Billable Fee	Billed
G. Kevin	Ben Franklin	Contract Review	0036	Open	Kevn G	09/04/2023			Telephone Call	Hourly	1.10	0.00	\$150.00 flat	\$150.00	Yes
G. Kevin	John Adams	Insurance	0130	Open		09/06/2023			Telephone Call	Hourly	0.30	0.00	\$350.00/hr	\$105.00	Yes
G. Kevin	John Adams	Real Estate Development	0182	Open		09/06/2023			Telephone Call	Hourly	0.10	0.00	\$350.00/hr	\$35.00	Yes



## Accounting

For customers with Accounting Module, we will show how data can be exported and downloaded.

### Accounts Receivable Tab:

The “Accounts Receivable” Tab is identical to the “Payment & Invoices” Tab within “Time & Billing” (see Page 16 for steps to download invoices).

**FIRM CENTRAL** 0:00 00 Kevin G

HOME MATTERS CONTACTS DOCUMENTS CALENDAR TIME & BILLING **ACCOUNTING** REPORTING ADMIN

Accounts Receivable Accounts Payable Chart of Accounts Checks

**Apply Payment**

Invoice Number \* Payment Date \* 2

Enter number 10/19/2023

Payment Amount \* Payment Type \*

\$

Payor/Payee

Enter a contact

Description

Notes to yourself and team

500 characters remaining

Apply Payment Cancel

Enter an Invoice Number to the left to view details

**Invoices**

Search Invoices Date range to Filter 2 selections

<input type="checkbox"/>	Date	Invoice #	Lead	Client	Matter	Matter ID	Send By	Amount	Paid	Due	Status
<input type="checkbox"/>	09/06/2023	<a href="#">1440</a>	KG	Franklin, Ben	Contract Review	0036		\$500.00	\$0.00	\$500.00	OVERDUE
<input type="checkbox"/>	09/06/2023	<a href="#">1439</a>	KG	Franklin, Ben	Real Estate Development, Franklin	0028	✓	\$161.00	\$0.00	\$161.00	OVERDUE
<b>Total</b>								\$661.00	\$0.00	\$661.00	

### Accounts Payable Tab:

Within the Accounts Payable page, there are three (3) sub-tabs. We'll start with "Payables".

1. Select "Accounting" from the main menu.
2. Select the "Accounts Payable" Tab.
3. Select the sub-tab "Payables".
4. We recommend you click on "Total Outstanding" or "All Payables" to capture all outstanding Payables.
5. Click the "Select All" box to the far left on the page.
6. Click the Export button or down arrow to choose your option to print or download.

The screenshot shows the Firm Central interface. The top navigation bar includes HOME, MATTERS, CONTACTS, DOCUMENTS, CALENDAR, TIME & BILLING, ACCOUNTING, REPORTING, and ADMIN. The ACCOUNTING tab is selected. Below it, the Accounts Payable sub-tab is active. The page displays a summary of outstanding payables and a list of individual entries.

**Accounts Payable Summary:**

Total Outstanding (2)	0-30 Days (0)	31-60 Days (0)	61-90 Days (0)	Over 90 Days (0)	All Payables (2)
OUTSTANDING <b>\$1,150.00</b> Next Due: 02/03/2023	OUTSTANDING <b>\$0.00</b> Next Due: -	OUTSTANDING <b>\$0.00</b> Next Due: -	OUTSTANDING <b>\$0.00</b> Next Due: -	OUTSTANDING <b>\$0.00</b> Next Due: -	OUTSTANDING <b>\$1,150.00</b> Next Due: 02/03/2023

**Search Payables:** [Search Bar]

**Payables List:**

<input checked="" type="checkbox"/>	Date	Due Date	Vendor	Reference	Due In	Status	Amount	Paid	Balance	
<input checked="" type="checkbox"/>	01/04/2023	02/03/2023	AAA Properties	Jan Rent	Past Due	Open	1,100.00	0.00	1,100.00	Pay
<input checked="" type="checkbox"/>	03/28/2023	04/27/2023	Cell Phones R Us	April Phone bill	Past Due	Open	50.00	0.00	50.00	Pay
							<b>1,150.00</b>		<b>1,150.00</b>	

Showing 1 to 2 of 2 entries | 1 | Show 20 entries

When selecting "Download" a pop-up window will appear, giving you the choice to rename the file and to choose the format (.CSV or PDF). Continue by selecting the "Download" button to download the information.

Download

X

Firm Central 2 Account Payables List

2 Account Payable(s)

File Name \*

Firm Central 2 Account Payables List

Format

CSV

Deliver As

Single File

Download

Cancel

The next tab within "Accounts Payable" is the "Payments" Tab.

1. Select "Accounting" from the main menu and then the "Accounts Payable" Tab.
2. Select the "Payments" Sub-tab.
3. Click on the box to the right of the page to "Select All".
4. Click the Export icon or down arrow to download the report. Like the "Payables" download, when selecting "Download" a pop-up window will appear, giving you the choice to rename the file and to choose the format (.CSV or PDF). Continue by selecting the "Download" button to download the information.

The screenshot shows the Firm Central interface. The top navigation bar includes 'HOME', 'MATTERS', 'CONTACTS', 'DOCUMENTS', 'CALENDAR', 'TIME & BILLING', 'ACCOUNTING', 'REPORTING', and 'ADMIN'. The 'ACCOUNTING' tab is selected. Below it, the 'Accounts Payable' section is active, with sub-tabs for 'Payables', 'Payments', and 'Credit Notes'. The 'Payments' sub-tab is selected. A search bar for 'Search Payments' is present. A table of payments is displayed with columns: Payment Date, User, Payment Type, Vendor, Reference, Notes, and Amount. The first row is selected, and a 'View' button is next to it. A red box labeled '3' highlights the 'Select All' checkbox. A red box labeled '4' highlights the export icon (a document with a download arrow). A red box labeled '2' highlights the 'Payments' sub-tab. A red box labeled '1' highlights the 'ACCOUNTING' menu item.

<input checked="" type="checkbox"/>	Payment Date	User	Payment Type	Vendor	Reference	Notes	Amount	
<input checked="" type="checkbox"/>	07/31/2023	KG	Check	AAA Properties	Aug Rent		1,100.00	View
<input checked="" type="checkbox"/>	04/28/2023	KG	Check	AAA Properties	Jan Rent		(1,100.00)	View
<input checked="" type="checkbox"/>	03/28/2023	KG	Check	Office Supply Company	office supplies		115.00	View
<input checked="" type="checkbox"/>	03/28/2023	KG	Credit Card	Burger Joint	lunch meeting		36.12	View
<input checked="" type="checkbox"/>	03/28/2023	KG	Check	Office Supply Company	office supplies		(115.00)	View
<input checked="" type="checkbox"/>	03/28/2023	KG	Check	Office Supply Company	office supplies		115.00	View
<input checked="" type="checkbox"/>	03/10/2023	KG	Payment	Hennepin County Clerk	filing		25.00	View
<input checked="" type="checkbox"/>	03/10/2023	KG	Check	Discount Office Supplies	Copy paper		21.00	View
<input checked="" type="checkbox"/>	02/16/2023	KG	Check	Pizza Hut	Lunch Meeting		36.12	View
<input checked="" type="checkbox"/>	02/16/2023	KG	Payment	Dakota County Clerk	filing fee		33.08	View

The third and last tab under “Accounts Payable” is the “Credit Notes” Tab.

1. Select “Accounting” from the main menu and then select “Accounts Payable”.
2. Click on the “Credit Notes” Sub-tab.
3. There is no option to select all notes or individual notes, so continue by clicking the Export icon or down arrow to begin the download. Like the “Payables” and “Payments” downloads, when selecting “Download” a pop-up window will appear giving you the choice to rename the file and to choose the format (.CSV or PDF). Continue by selecting the “Download” button to download the information.

The screenshot shows the Firm Central interface. The top navigation bar includes HOME, MATTERS, CONTACTS, DOCUMENTS, CALENDAR, TIME & BILLING, ACCOUNTING, REPORTING, and ADMIN. The ACCOUNTING tab is selected. Below it, the Accounts Payable sub-tab is active, showing sub-tabs for Payables, Payments, and Credit Notes. The Credit Notes sub-tab is selected. A search bar for Credit Notes is present. Below the search bar is a table with columns: Date, User, Vendor, Reference, Status, Amount, Used, Balance, and a View button. The table contains four entries. Callout 1 points to the ACCOUNTING tab in the top navigation bar. Callout 2 points to the Credit Notes sub-tab. Callout 3 points to the Export icon (a document with a download arrow) in the top right corner of the table area.

Date	User	Vendor	Reference	Status	Amount	Used	Balance	
10/28/2021	KG	American Express	client exp	Closed	119.00	119.00	0.00	<a href="#">View</a>
10/28/2021	KG	Bank of America VISA	ccrd bill	Closed	429.00	429.00	0.00	<a href="#">View</a>
03/02/2020	RH	Banana Republic	More uniforms	Closed	300.00	300.00	0.00	<a href="#">View</a>
11/21/2018	KG	In And Out Burger	Company Lunch	Closed	75.00	75.00	0.00	<a href="#">View</a>

Showing 1 to 4 of 4 entries | 1 | Show 20 entries

### Chart of Accounts Tab:

Data from the Chart of Accounts can be exported following these steps:

1. Select "Accounting" from the main menu and then select "Chart of Accounts".
2. To capture all the Chart of Accounts data, select the "All" box. You can also select individual account categories, if so desired.
3. Click the "Select All" box on the far left on the page.
4. Click on the Export icon or down arrow to begin the export. Like the "Payables" and "Payments" download, when selecting "Download" a pop-up window will appear, giving you the choice to rename the file and to choose the format (.CSV or PDF). Continue by selecting the "Download" button to download the information.

The screenshot shows the Firm Central interface with the 'ACCOUNTING' tab selected. The 'Chart of Accounts' sub-tab is active. The interface displays a summary of account categories and a detailed list of accounts.

**Account Categories Summary:**

Category	Count	Balance
Asset	17	\$5,388,401.18
Liability	5	\$2,884,671.83
Equity	3	(\$752,841.28)
Income	8	\$3,338,209.46
Expense	24	\$81,638.83
All	57	\$10,940,080.02

**Account List Table:**

Account Number	Account Name	Type	Status	Balance	Action
10000	Operating Account - Checking	Asset	Active	3,422,467.28	Edit
10011	Mastercard	Asset	Active	(5,935.17)	Edit
10012	Credit Card - Opening Balance	Asset	Active	5,400.00	Edit
10100	Trust Account	Asset	Active	515,436.78	Edit
10101	Investment Account	Asset	Active	15,000.00	Edit
10200	Credit Card	Asset	Active	1,919.88	Edit
10300	Escrow IOLTA	Asset	Active	1,043,316.86	Edit
10400	IOLTA 2B	Asset	Active	2,021.00	Edit
10501	Bank of America VISA	Asset	Active	(1,200.00)	Edit

**Callouts:**

- 1:** Points to the 'ACCOUNTING' menu item.
- 2:** Points to the 'All' account category box in the summary.
- 3:** Points to the 'Select All' checkbox in the account list table.
- 4:** Points to the export icon (down arrow) in the account list table.

To download or export data from an individual account, click on the account balance (highlighted in blue in the “Balance” column). This will bring you into the individual account.

1. Begin by selecting your date range.
2. Click the “Select All” box on the far left on the page.
3. Click on the Export icon or down arrow to begin the download. Like the “Payables” and “Payments” download, when selecting “Download” a pop-up window will appear, giving you the choice to rename the file and to choose the format (.CSV or PDF). Continue by selecting the “Download” button to download the information.

**FIRM CENTRAL**

HOME MATTERS CONTACTS DOCUMENTS CALENDAR TIME & BILLING ACCOUNTING REPORTING ADMIN

Operating Account - Checking (10000)

Opening Balance: \$3,882,172.87 | Last Reconciled Date: -

Ending Balance: **\$3,422,467.28**

Search Transactions: Date Range 09/01/2021 to 10/19/2023

<input checked="" type="checkbox"/>	Date	Type	Ref Number	Description	Debits	Credits	Balance	
<input checked="" type="checkbox"/>	10/12/2022	AP Payment	filing fee	Dakota County Clerk - filing fee		\$25.00	\$3,346,035.84	<a href="#">View</a>
<input checked="" type="checkbox"/>	10/12/2022	Deposit	interest for Sept	interest for Sept	\$6.02		\$3,346,060.84	<a href="#">View</a>
<input checked="" type="checkbox"/>	10/12/2022	Invoice Pay...	1402	Ben Franklin - 0036 - CK#11123	\$1,220.00		\$3,346,054.82	<a href="#">View</a>
<input checked="" type="checkbox"/>	09/26/2022	Invoice Pay...	1402	John Adams - 0182 - CK#11123	\$1,490.00		\$3,344,834.82	<a href="#">View</a>
<input checked="" type="checkbox"/>	09/20/2022	AP Payment	Photocopy Paper	Discount Office Supplies - Office Supplies		\$25.00	\$3,343,344.82	<a href="#">View</a>
<input checked="" type="checkbox"/>	09/19/2022	Deposit	interest for August	August Interest	\$6.02		\$3,343,369.82	<a href="#">View</a>
<input checked="" type="checkbox"/>	09/19/2022	AP Payment	Sept Rent	AAA - Sept Rent		\$1,100.00	\$3,343,363.80	<a href="#">View</a>
<input checked="" type="checkbox"/>	09/19/2022	Invoice Pay...	1393	Ben Franklin - 0036 - CK#11111	\$100.00		\$3,344,463.80	<a href="#">View</a>
<input checked="" type="checkbox"/>	09/19/2022	Invoice Pay...	1400	Acme Corp - 0072 - Reversal: 09/19/2022, KG, Check, CK#11	(\$100.00)		\$3,344,363.80	<a href="#">View</a>
<input checked="" type="checkbox"/>	09/19/2022	Invoice Pay...	1400	Acme Corp - 0072 - CK#11	\$100.00		\$3,344,463.80	<a href="#">View</a>

**Checks Tab:**

To download generated checks, follow these steps:

1. Select "Accounting" from the main menu and then select "Checks".
2. From the "Filter by" drop down menu, select "All Bank Accounts" or individual bank accounts.
3. To download checks that have been printed or voided, check the "Include Printed/Voided" box.
4. Click on the "Select All" box to include all the checks (optional).
5. Click the "Print" button. Please note, this information is only sent to your printer. However, most printers have an option to create a PDF. We recommend doing this to keep a digital copy of your checks.

The screenshot shows the Firm Central web application interface. The top navigation bar includes links for HOME, MATTERS, CONTACTS, DOCUMENTS, CALENDAR, TIME & BILLING, ACCOUNTING, REPORTING, and ADMIN. The 'ACCOUNTING' tab is selected, and the 'Checks' sub-tab is active. Below the navigation bar, there are tabs for Accounts Receivable, Accounts Payable, Chart of Accounts, and Checks. The 'Checks' tab is selected, and the page title is 'Checks'. Below the title, there is a search bar labeled 'Search Checks' and a filter dropdown menu set to 'All Bank Accounts'. To the right of the filter is a checkbox labeled 'Include Printed/Voided' which is checked. Further right are buttons for 'Order Checks' and 'Print'. Below these elements is a table of checks. The table has columns for Date, User, Account #, Type, Payee, Reference, Check #, Status, and Amount. The first row is highlighted in yellow. Red boxes with numbers 1 through 5 are overlaid on the interface to indicate the steps: 1 points to the 'ACCOUNTING' tab, 2 points to the 'Filter by' dropdown, 3 points to the 'Include Printed/Voided' checkbox, 4 points to the 'Select All' checkbox, and 5 points to the 'Print' button.

Date	User	Account #	Type	Payee	Reference	Check #	Status	Amount
09/14/2018	JG	10000	Payable	E-File Service	Fees	123	Printed	12.00
09/14/2018	JG	10000	Payable	E-File Service	124	124	Printed	50.00
09/21/2018	KG	10000	Payable	Copy Center	1245	1245	Printed	40.00
09/24/2018	JG	10000	Payable	Office Equipment Supply	1234	1234	Printed	575.00
09/25/2018	JG	10000	Payable	Office Equipment Supply	100	100	Printed	300.00
09/25/2018	JG	10000	Firm Expense	Copy Center	1254	1254	Printed	50.00
09/29/2018	AKR	10000	Payable	E-File Service	1234	1234	Printed	300.00
10/23/2018		10000	Payable	Hennepin County Clerk	124	124	Printed	175.00
10/29/2018		10000	Payable	Hennepin County Clerk	12345	1234	Printed	510.00
10/30/2018		10000	Payable	Copy Center	1234	1234	Printed	50.00



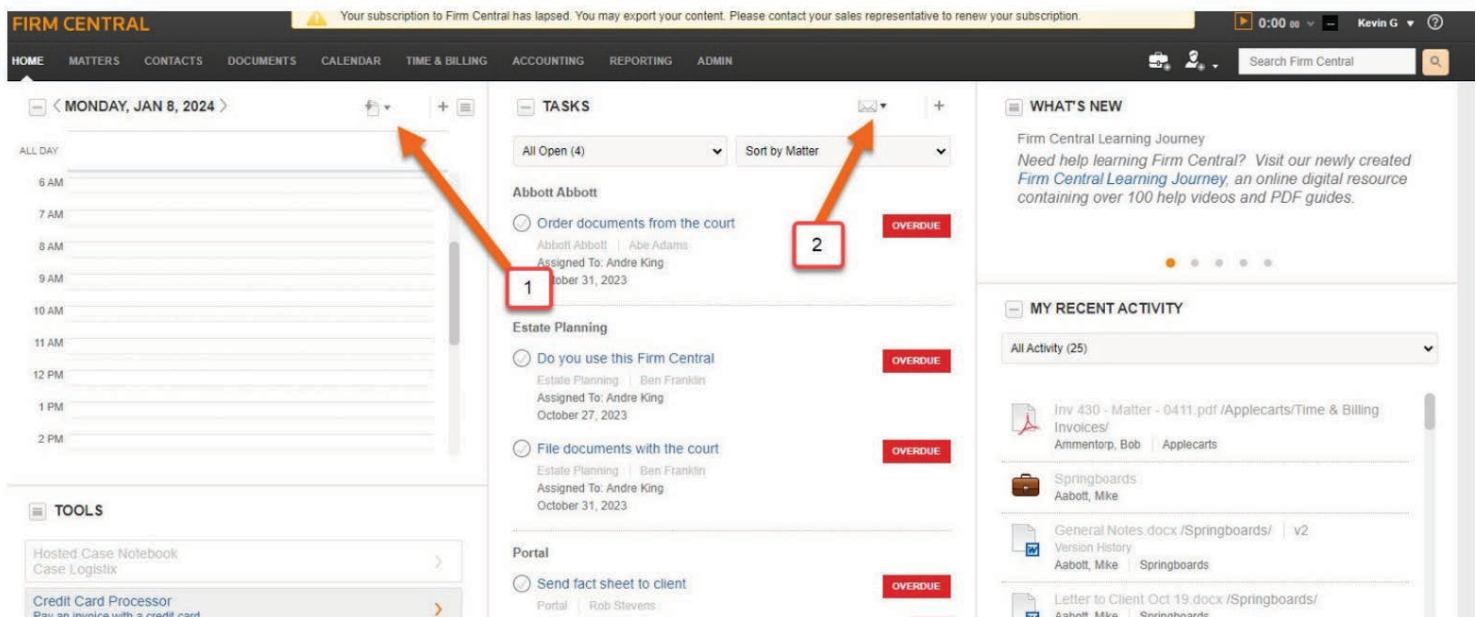
## Exporting data from a lapsed Firm Central

This section will provide information on how to export your data from a Firm Central subscription that has been lapsed.

The first thing to note is that you will have 180 days (about 6 months) after the lapse date, to access Firm Central. Your access will be limited, and we shall review that here in this document. We will go page by page in Firm Central describing what data can be exported.

### Home Page

Starting with the Home Page, you will first notice a warning message going along the top of every page in Firm Central. This is just to indicate that your subscription has lapsed.



You will be able to export data from:

1. The Calendar. Remember, this Calendar Widget is only a one-day snapshot. The export option will be grayed-out if there is no data on the calendar. It is recommended to export data from the main Calendar. This will be outlined further in this document.
2. Tasks
3. Notifications

## Matters

You will not be able to access individual Matters. That option will be grayed out.

The screenshot shows the 'Matters' page in Firm Central. The top navigation bar includes 'HOME', 'MATTERS', 'CONTACTS', 'DOCUMENTS', 'CALENDAR', 'TIME & BILLING', 'ACCOUNTING', 'REPORTING', and 'ADMIN'. A yellow banner at the top states: 'Your subscription to Firm Central has lapsed. You may export your content. Please contact your sales representative to renew your subscription.' The user is logged in as 'Kevin G'. The 'Matters' tab is active, showing 'All Matters' and 'My Matters' sub-tabs. A search bar is present. The main table lists matters with columns for checkboxes, matter names, IDs, client names, and status/dates. On the left, there are filters for 'OPEN/CLOSED', 'USERS', 'DATE OPENED', and 'PRACTICE AREA'. On the right, there are buttons for 'New Matter', 'Export', 'Print', and 'Email'. Red boxes and arrows highlight the 'Export' button (labeled 1) and the 'Email' button (labeled 2).

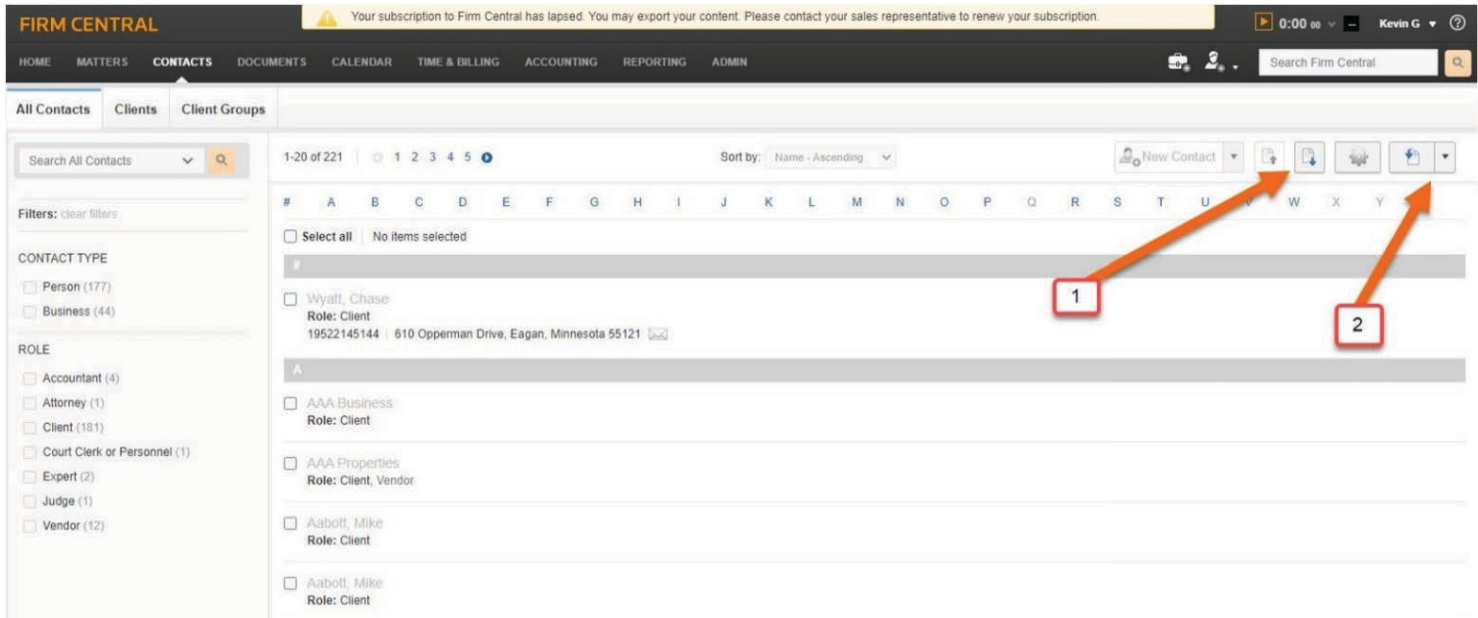
You will be able to export your Matter list in one of two ways:

1. Selecting this menu option will download your Matter list as a .CSV file. The file will contain most, but not all, of the information on the Matter intake.
2. This second option will allow you to export to a .CSV file, like the first option. In addition, you will be able to print or email your Matter list. If you choose to email the Matter list, a pop-up window will appear with a drop down offering the option to email the Matter list as a PDF, CSV or Word document.

The 'Email Request' pop-up window is shown. It has a dark header with the title 'Email Request' and a close button. The form includes a 'To \*' field, a 'Subject \*' field with the text 'Firm Central Matter List - 190 Matter(s)', and a 'Message' field with a character count of '500 characters remaining'. On the right side, there is a 'Format' dropdown menu with the following options: CSV, Microsoft Word, PDF, and Single File. The 'CSV' option is currently selected. At the bottom of the window, there are 'Send' and 'Cancel' buttons.

## Contacts and Clients

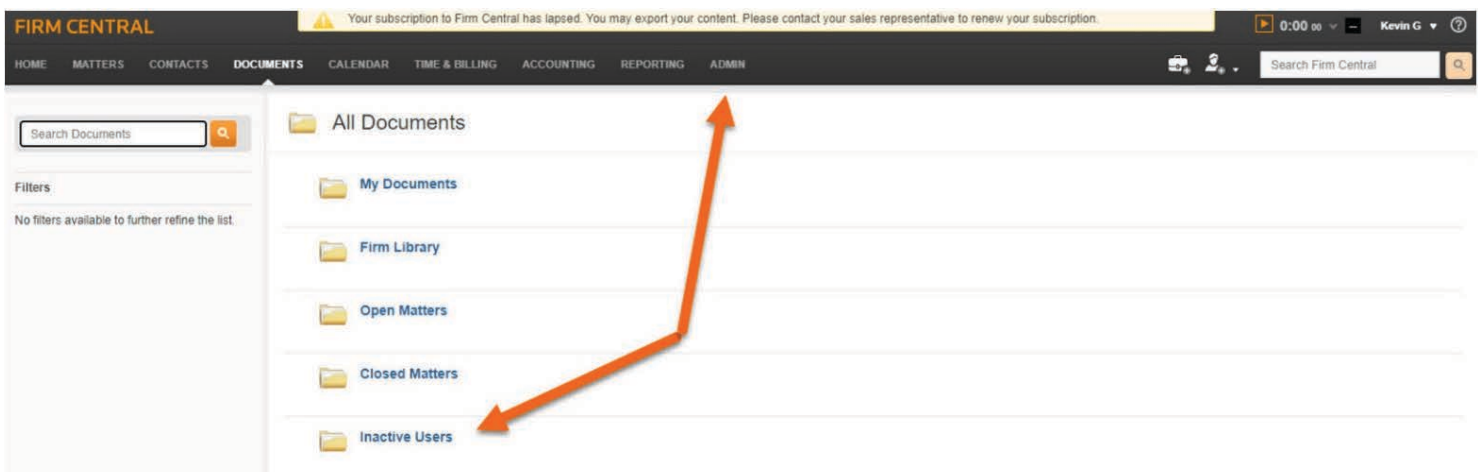
Like the Matter Profile, you will not be able to access the Contact and Client Profile. You will be able to export the Contact and Client list as shown below.



1. Selecting this menu option will download your Contact and Client list as a .CSV file. The file will contain most, but not all, of the information on the Contact and Client intake form.
2. This second option will allow you to export to a .CSV file, like the first option. In addition, you will be able to print or email your Contact and Client list. If you choose to email the list, a pop-up window will appear with a drop down offering the option to email the list as a PDF, CSV, or Word document.

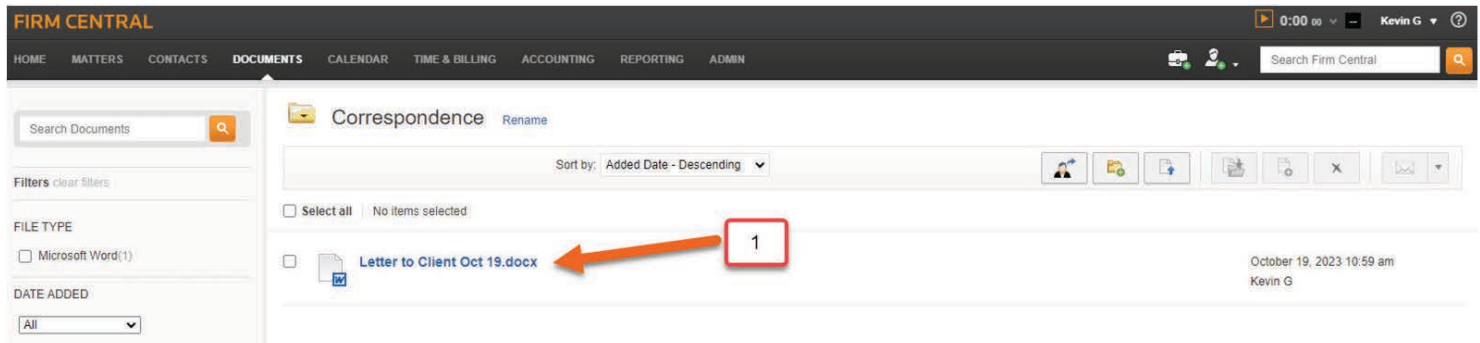
## Documents

The Documents Tab will have full access to all documents, including the ability to run the search option. Please note that you must be logged in as Admin to access the "My Documents" folder for any inactive user.

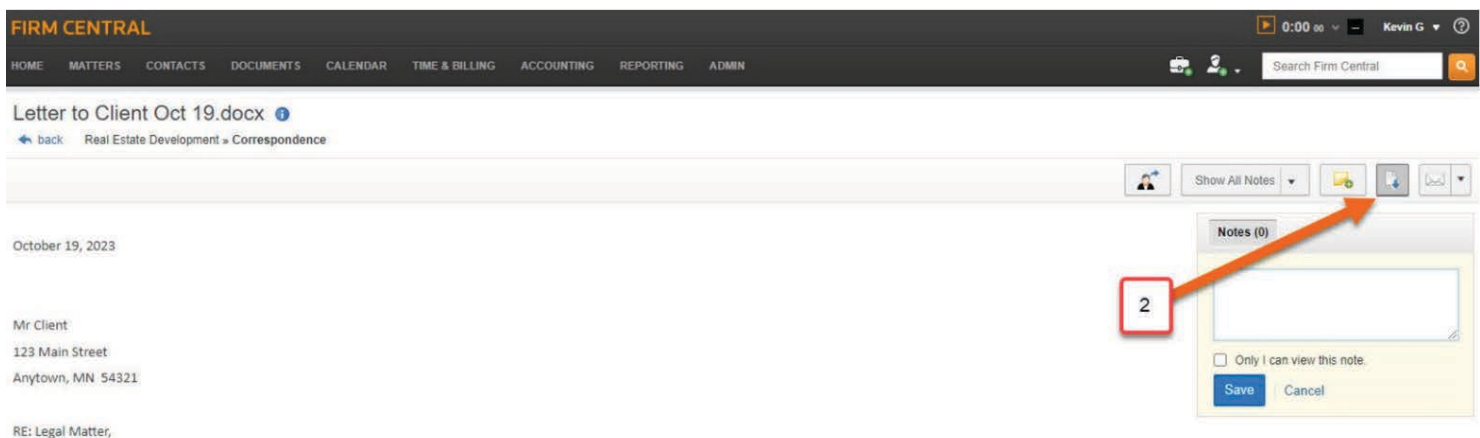
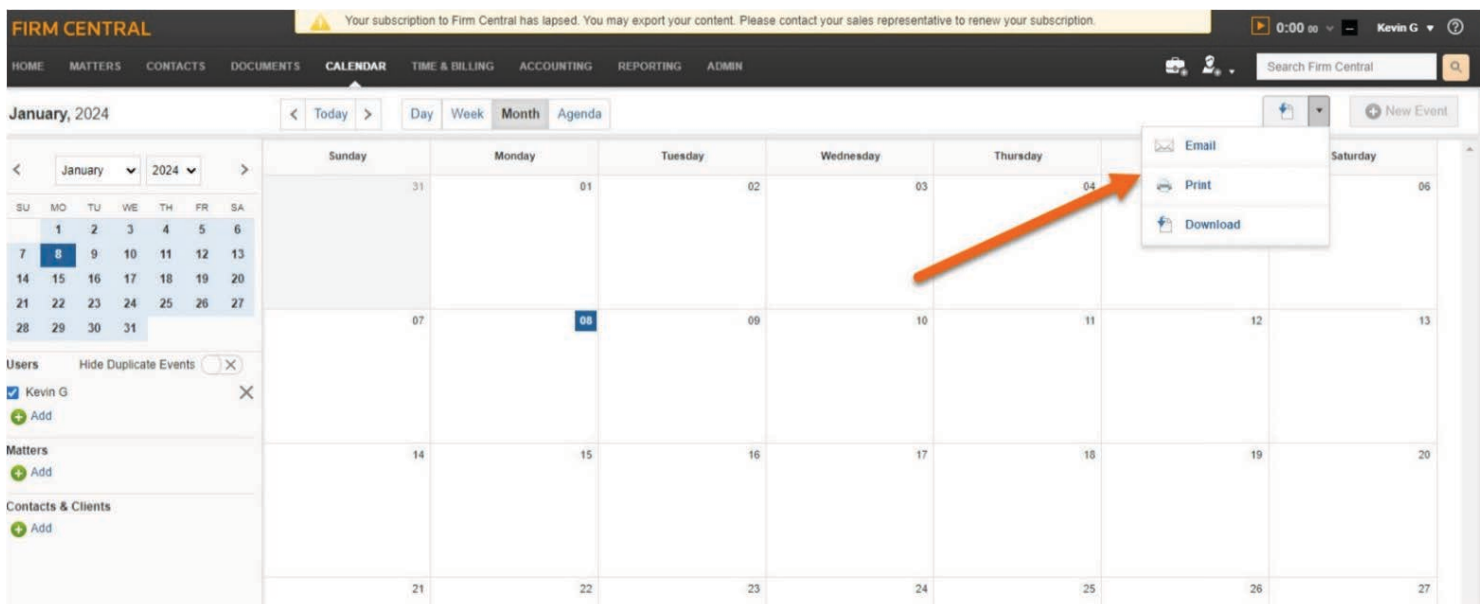


To download an individual document, drill down into the folder to the document you want to download.

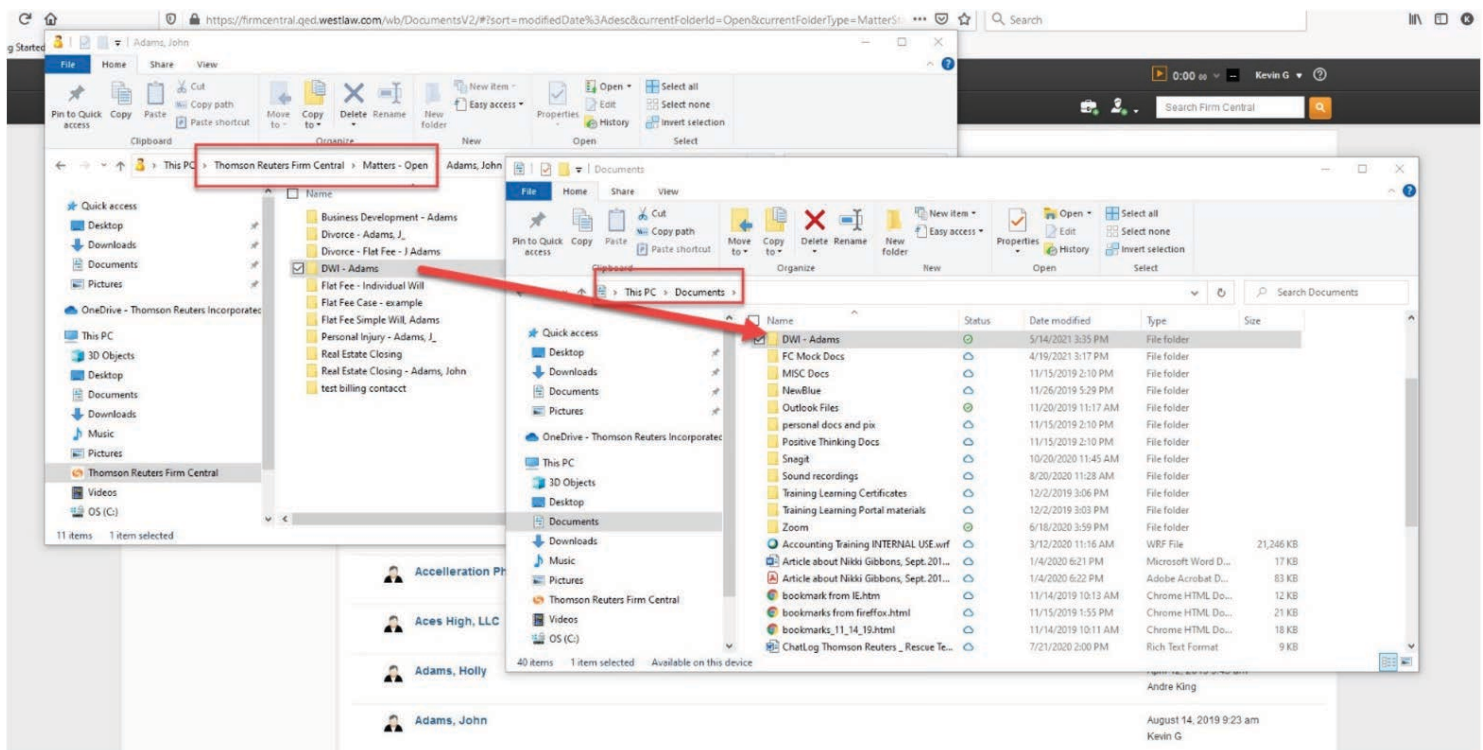
1. Select the individual document by clicking on the document name highlighted in blue.



2. Then, in the upper right corner click on the export icon. Your document will be downloaded in its original format



If you have the Desktop software installed, you will be able to drag and drop documents from Firm Central using the Windows File Explorer. The best method is to use Windows File Explorer. You do need to have the Desktop App installed to use this feature. With this, you can open two file explorers and copy or drag-and-drop from one (Firm Central) to another (your own computer). You will need to drill down to the Matter and copy that folder. You can copy entire folders, which will have sub folders and files. Please note that the Desktop App is only available for PC computers. If you have many files that need to be exported from Firm Central to your machine, we recommend that you export them in chunks (e.g., 100-to-200 at a time), rather than all of them at once.



If you do not have the Desktop Software installed, you can click on this link to download and install. Please note, this software is only compatible with a Windows computer.

<http://info.legalsolutions.thomsonreuters.com/software/firm-central/>

Also, here is a help video with step-by-step instructions to download and install the Desktop Software:

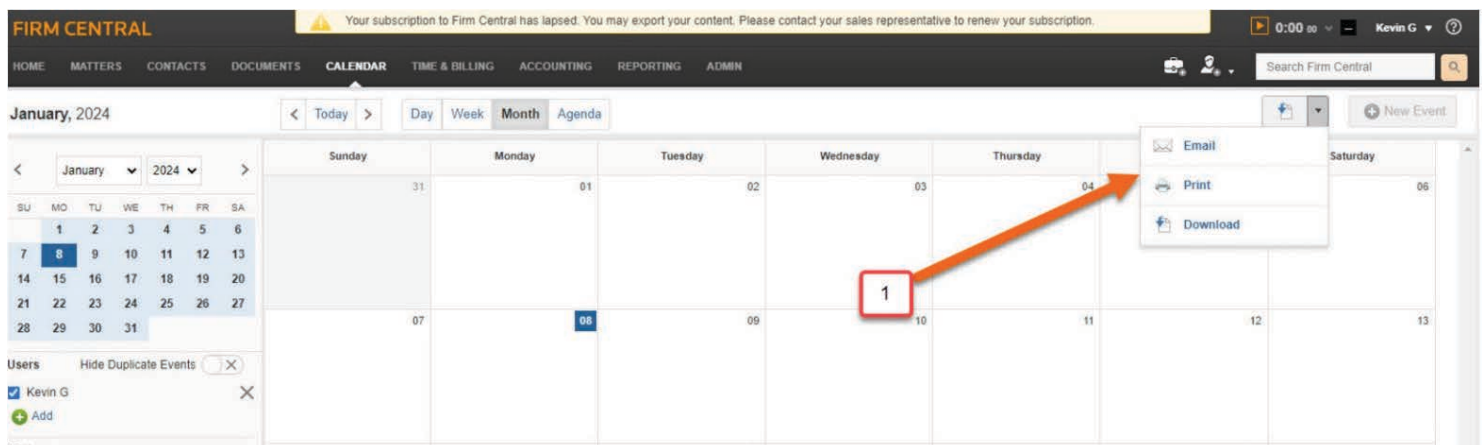
<https://answers.legalprof.thomsonreuters.com/firm-central/tx4han2wuet7fah5sri5>



## Calendar

You will be able to export your calendar events along with the Deadline Assistant events if you have this in your subscription.

1. In the upper right corner, click on the “Export” button and a pop-up window will appear the options to Email, Print, or Download.



2. You can select a date range to export along with which type of events and the file type. If you have Deadline Assistant, the option to print those events separately is available.

Download

X

Choose options below for delivering events.

Calendar filters will be applied to delivered results.

Which dates do you want to include?

☒ Events within the next year  
☐ Dates between (limited to 365 days)  
 10/01/2023 and 10/31/2023

Which events do you want to include?

All Events

What format do you want to receive?

Deliver As

PDF

Note: you can only export 365 days at a time, so depending on how long you have used the Firm Central calendar, you may need to run multiple exports. You can run the export in different file types; however, you should export at least one file type as a .CSV file. Most practice management software import/exports require .CSV files. This will allow you to import your Calendar data into another practice management system, provided it is supported.

## Time & Billing

You will have full functionality of the Pre-Bills page along with the “Payment & Invoices”, “Trust & Retainers” and “All Accounts” pages. This will allow you to complete all billing including the ability to close out Trust & Retainer Accounts and print all Account Summary Statements.

Even though certain buttons may work on the “Time Entry” and “Expense Entry” pages, neither will be functional. We will now go through each page. Please note for the sake of brevity, we will not explain “how” to do certain functions, such as “edit a Pre-Bill”.

## Time Entry and Expense Entry

The “Time Entry” and “Expense Entry” Tabs may appear to have active menu options, but these pages are not functional. You can, however, enter time and expense in the Pre-Bill Summary, which we will cover next.

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HOME MATTERS CONTACTS DOCUMENTS CALENDAR **TIME & BILLING** ACCOUNTING REPORTING

Time Entry Expense Entry Pre-Bills Payment & Invoices Trusts & Retainers All Accounts

Time Entry 0.00 Daily Total \$0.00

G, Kevin

Monday, Jan 15, 2024 Go < Today > Day Week

Date	Client / Matter	External Narrative	Hours	Details	Total
MON JAN 15	Client Name	Enter message to client		Activity / Task	\$0.00
	Matter Name			\$400.00	\$0.00

## Pre-Bills

You will have full functionality to generate Pre-Bills whether in a batch or individual selected Matters.

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HOME MATTERS CONTACTS DOCUMENTS CALENDAR **TIME & BILLING** ACCOUNTING REPORTING ADMIN

Time Entry Expense Entry **Pre-Bills** Payment & Invoices Trusts & Retainers All Accounts

Generate Pre-Bills

Select Pre-Bill Group ☐ Include matters with no new activity

All Matters (185) UNBILLED TIME \$65,426.05 Oldest Item: 11/14/2018

Attorney 1 (2) UNBILLED TIME \$0.00 Oldest Item:

Enter Date Range 11/14/2018 01/08/2024 Generate Pre-Bills

Pre-Bills

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HOME MATTERS CONTACTS DOCUMENTS CALENDAR **TIME & BILLING** ACCOUNTING REPORTING

Time Entry Expense Entry **Pre-Bills** Payment & Invoices Trusts & Retainers All Accounts

Generate Pre-Bills

Select Pre-Bill Group ☐ Include matters with no new activity Select Matters Manage Pre-Bill Groups

**All Matters (185)**

UNBILLED TIME  
**\$0.00**

Oldest Item:

**Attorney 1 (2)**

UNBILLED TIME  
**\$0.00**

Oldest Item:

Enter Date Range  Generate Pre-Bills

**Pre-Bills**

⌂
Finalize
Remove
Generate Invoice

<input type="checkbox"/>	Generated Date	Start	End	Lead	Client	Matter	Matter ID	Billing Type	Total	Status	
<input checked="" type="checkbox"/>	01/08/2024	11/14/2018	01/08/2024		AAA Properties	aaa business	0251	Hourly	\$175.00	Pre-Bill	Edit
<input checked="" type="checkbox"/>	01/08/2024	11/14/2018	01/08/2024		Billboards Inc.	Abacus	0375	Hourly	\$35.00	Pre-Bill	Edit
<input checked="" type="checkbox"/>	01/08/2024	11/14/2018	01/08/2024		Adams, Abe	Abbott Abbott	0255	Hourly	\$175.00	Pre-Bill	Edit
<input type="checkbox"/>	01/08/2024	11/14/2018	01/08/2024		Balaban, Bob	ABC	0379	Hourly	\$0.58	Pre-Bill	Edit
<input type="checkbox"/>	01/08/2024	11/14/2018	01/08/2024		Parker, Bonnie	Apples	0213	Hourly	\$1,275.00	Pre-Bill	Edit

All functions on the Pre-Bills page will remain active, including the ability to:

1. Select Matters.
2. Sort by Date Generated or other column headers.
3. Print or Download.
4. Finalize, Remove, or Generate into an Invoice.
5. Edit.



**State of Florida vs Dwayne Johnson (0085 - 0101)** Fee Arrangement: Hourly  
Aguirre, Grisell Billable Date Range: 11/14/2018 to 01/08/2024

**Time Entries** Expense Entries Invoice Summary

All Users

**Time Entries** ①

All time entries have been added to this pre-bill.

Date	User	External Narrative	Details	Time	Billable	
Thu Jun 16	Pettersen, Bill	Enter message to client	Consult / Task	0.02	\$1.67	Remove
Fri Jun 03	King, Andre	training with Shane glad it's summer time	Activity / Task	0.30	\$105.00	Remove
Wed Jun 01	King, Andre	training with Shane glad it's summer time	Activity / Task	5.20	\$1,820.00	Remove
<b>Total</b>				<b>5.52</b>	<b>\$1,926.67</b>	

**Invoice Adjustments** ①

Adjust	Time	Total
Add	0.02	\$1.67
Add	0.30	\$105.00
Add	5.20	\$1,820.00
<b>Total</b>		<b>\$1,926.67</b>

Invoice Total: **\$1,926.67**

Buttons: Finalize, Generate Invoice, Remove, + Time Entry, Save

### Edit a Pre-Bill

Special attention should be given to this page because it remains fully functional. Meaning, you can:

1. Access Time and Expense Entries along with any edits on the Invoice Summary Page.
2. Edit any Time or Expense Entries, including all functions relating to Adjustments, Removing, and Deleting entries.
3. Add or remove a time or Expense Entry, saving all edits.
4. Finalize, Generate an Invoice, and Write Off or Remove a Pre-Bill.

Please note that even though we are not showing the "Expense Entry" page or the "Pre-Bill" Summary page, these pages are fully functional.

The screenshot shows the 'Payment & Invoices' page in Firm Central. The page is divided into two main sections: 'Apply Payment' and 'Invoices'.

**Apply Payment Section:**

- 1:** Points to the 'Invoice Number' field, which has a placeholder 'Enter number'.
- 2:** Points to the 'Payment Date' field, which has a placeholder '01/08/2024'.
- 3:** Points to the 'Payment Amount' field, which has a placeholder '\$'.
- 4:** Points to the 'Payment Type' dropdown menu.
- 5:** Points to the 'Payor/Payee' dropdown menu.
- 6:** Points to the 'Description' field, which has a placeholder 'Notes to yourself and team' and a '500 characters remaining' indicator.
- 7:** Points to the 'Apply Payment' button.
- 8:** Points to the 'Cancel' button.

**Invoices Section:**

- 9:** Points to the 'Search Invoices' field.
- 10:** Points to the 'Date range' field.
- 11:** Points to the 'Filter' dropdown menu.
- 12:** Points to the 'Apply Payment' button.

**Invoices Table:**

	Date	Invoice #	Lead	Client	Matter	Matter ID	Send By	Amount	Paid	Due	Status
<input type="checkbox"/>	01/08/2024	<a href="#">431</a>		Arnold, Tom	Trust Administration	0205		\$25.00	\$0.00	\$25.00	Unpaid
<input type="checkbox"/>	01/08/2024	<a href="#">430</a>		Ammentorp, Bob	Applearts	0411		\$0.58	\$0.25	\$0.33	Partial
<input type="checkbox"/>	08/10/2023	<a href="#">422</a>		Ammentorp, Bob	Real Estate Millions	0359	✓	\$5,000.00	\$0.00	\$5,000.00	OVERDUE
<input type="checkbox"/>	05/30/2023	<a href="#">420</a>		Ammentorp, Bob	Applearts	0411		\$70.00	\$25.00	\$45.00	OVERDUE
<input type="checkbox"/>	05/01/2023	<a href="#">413</a>		Ammentorp, Bob	Applearts	0401		\$200.00	\$0.00	\$200.00	OVERDUE
<input type="checkbox"/>	03/13/2023	<a href="#">378</a>		White, Molly	Copyright, Molly W.	0073	Email	\$2,550.00	\$2,000.00	\$550.00	OVERDUE

## Payment & Invoices

The Payment & Invoices page is fully functional. You will have all the ability to:

1. Apply a payment directly on this page or by clicking on the invoice number to load the alternate payments page.
2. Sort and filter.
3. Select invoices.
4. Print, Email, Download, or Export Invoices.
5. Click on the Invoice to access the alternate Invoice page, which we will cover next.

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HOME MATTERS CONTACTS DOCUMENTS CALENDAR **TIME & BILLING** ACCOUNTING REPORTING

Applecarts (0373 - 0411) Fee Arrangement: Hourly  
Bob Ammentorp Billable Date Range: 11/14/2018 to 01/08/2024

**Invoice #430**  
Invoice Amount \$0.58

Amount Due **\$0.33**

Transactions

Date	User	Payment Type	Payor/Payee	Description	Amount
01/08/2024	KG	Check		CK# 11123	\$0.25

Showing 1 to 1 of 1 entries

**download** 1 / 3 100% +

**FIRM CENTRAL PREMIER ACCOUNT**  
Water 245  
New York, NY 11000  
Office: (612) 234-4567  
www.lawfirmarchi.com

All functions are available on the alternate Invoice page including:

1. Print, Email, or Download.
2. Add a Payment or Adjustment.
3. Edit or reverse the payment.
4. Void an Invoice.

#### LawPay and Quickbooks Integration:

For those customers who have the integration with LawPay and Quickbooks, the integration will still be functional (provided your account with these providers is still active).

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HOME MATTERS CONTACTS DOCUMENTS CALENDAR **TIME & BILLING** ACCOUNTING REPORTING ADMIN

Time Entry Expense Entry Pre-Bills Payment & Invoices **Trusts & Retainers** All Accounts

Trusts & Retainers

Search Accounts Filter by: All Account types (76) ☐ Include Closed Accounts

Balance \$953,992.83

<input type="checkbox"/>	Account Name	Client	Matter	Matter ID	Lead	Account Type	Balance
<input type="checkbox"/>	<a href="#">Springboards - Retainer</a>	Aabott, Mike	Springboards	0347		Matter Retainer	\$25,000.00
<input type="checkbox"/>	<a href="#">Abacus - Pre-payment</a>					Client Pre-payment	\$25.00
<input type="checkbox"/>	<a href="#">Vaudeville - Retainer</a>	Abbott Costello	Vaudeville	0261		Matter Retainer	\$2,500.00
<input type="checkbox"/>	<a href="#">Shelly - Trust Account</a>	Acme Phone	Shelly	0111		Matter Trust Account	\$5,000.00
<input type="checkbox"/>	<a href="#">Acme Waxworks - Trust Account</a>	Acme Waxworks				Client Trust Account	\$35.00
<input type="checkbox"/>	<a href="#">Aquariums - Retainer</a>	Acme Waxworks	Aquariums	0105		Matter Retainer	\$3,000.00
<input type="checkbox"/>	<a href="#">Abbott Abbott - Retainer</a>	Adams, Abe	Abbott Abbott	0255		Matter Retainer	\$2,590.00
<input type="checkbox"/>	<a href="#">Fabulous - Trust Account</a>	Adams, Rachel	Fabulous	0099		Matter Trust Account	\$5,500.00
<input type="checkbox"/>	<a href="#">State of Florida vs Dwayne Johnson - Retainer</a>	Aguirre, Grisell	State of Florida vs Dwayne Johnson	0101		Matter Retainer	\$3,073.33
<input type="checkbox"/>	<a href="#">Powerball Winner of 360 Million - Trust Account</a>	Amos, Dawn	Powerball Winner of 360 Million	30-2514		Matter Trust Account	\$2,680.00

### Trust & Retainers

All functions within the Trust & Retainers pages are fully functional, allowing you to make transactions, close accounts, and export data. You will have the ability to:

1. Add an Account.
2. Print, Download, or Export.
3. Use the filter and search options.
4. Click into individual accounts.

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HOME MATTERS CONTACTS DOCUMENTS CALENDAR **TIME & BILLING** ACCOUNTING REPORTING ADMIN

**SPRINGBOARDS - RETAINER | Matter Retainer** Date Opened: Nov. 30, 2022 Open Springboards (0347) Mike Aabott

Search Transactions

Balance \$25,000.00 Minimum \$500.00

<input type="checkbox"/>	Date	User	Type	Invoice #	Payment Type	Payor/Payee	Description	Debits	Credits	Balance	
<input type="checkbox"/>	11/30/2022	WJP	Deposit		Check		Opening Balance from client		\$25,000.00	\$25,000.00	<input type="button" value="Edit"/>
								\$0.00	\$25,000.00	\$25,000.00	

Showing 1 to 1 of 1 entries 1

All the functions within the individual accounts are active.

1. Print, Download, or Export.
2. Edit or close.
3. Add a transaction.
4. Edit a transaction.
5. Select transactions.
6. Filter options.

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HOME MATTERS CONTACTS DOCUMENTS CALENDAR **TIME & BILLING** ACCOUNTING REPORTING ADMIN

Time Entry Expense Entry Pre-Bills Payment & Invoices Trusts & Retainers **All Accounts**

All Accounts

Search All Accounts ☐ Include open matters with zero balances

Total Outstanding **\$440,601.89**

<input type="checkbox"/>	Client	Matter	Matter ID	Lead	Matter Balance	Account Summary
<input type="checkbox"/>	Springboards	0347			\$0.00	\$20,000.00
<input type="checkbox"/>	Anderson, Jeff	Plumbing	0401		\$200.00	
<input type="checkbox"/>	Abbott Costello	Vaudeville	0261		\$199.00	\$2,500.00
<input type="checkbox"/>	Abbott, Alvy	Real Estate Millions	0359		\$5,000.00	

### All Accounts

All functions are available in "All Accounts", including the ability to:

1. Filter.
2. Select.
3. Print, Download, or Export.
4. Select an Individual account.

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HOME MATTERS CONTACTS DOCUMENTS CALENDAR **TIME & BILLING** ACCOUNTING REPORTING ADMIN

Vaudeville (0233 - 0261)  
Abbott Costello Date Opened: Jul 21, 2022

Balance **\$199.00**

01/15/2024 Go View: Hide Voided and Reversed

Date	User	Type	Invoice	Description	Charges	Credits	Balance
10/20/2022		Invoice	281	Invoice			\$199.00
07/21/2022		Invoice	211	Invoice			\$199.00
07/21/2022		Invoice	210	Invoice			\$199.00
07/21/2022	WJP	Payment	209			\$37.00	\$199.00
07/21/2022	WJP	Payment	209			\$64.00	\$236.00
07/21/2022	WJP	Matter Ret	209	Auto Deducted from Vaudeville - Retainer		\$500.00	\$300.00
07/21/2022		Invoice	209	Invoice	\$800.00		\$800.00

Showing 1 to 7 of 7 entries

All functions are working within an individual account under "All Accounts", including:

1. Sort and filter.
2. Select an invoice to view.
3. Sort the Date column.
4. Print or Download.

## Accounting

All functions within the Firm Central Accounting Module are fully functional, allowing you to print, download, export, reconcile, add adjustments, and perform other activities. We will now provide a high-level overview of each page. As with the Time & Billing section, we will not go into detail on each page, but rest assured that the Accounting pages are all fully functional. The same access and functionality will be available for those customers who have granted their Accountant access to Firm Central Accounting.

All Accounting tabs and pages are fully functional, allowing you to complete your work and export your data.

FIRM CENTRAL

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0:00 33 Kevin G

HOME MATTERS CONTACTS DOCUMENTS CALENDAR TIME & BILLING ACCOUNTING REPORTING ADMIN

Search Firm Central

Accounts ReceivableAccounts PayableChart of AccountsChecks

Apply Payment

Invoice Number \*  
Enter number

Payment Date \*  
01/08/2024

Payment Amount \*  
\$

Payment Type \*

Payor/Payee  
Enter a contact

Description  
Notes to yourself and team  
500 characters remaining

Apply PaymentCancel

Enter an Invoice Number to the left to view details

Invoices

Search Invoices

Date range  
to

Filter 2 selections

Apply Payment

<input type="checkbox"/>	Date	Invoice #	Lead	Client	Matter	Matter ID	Send By	Amount	Paid	Due	Status
<input type="checkbox"/>	01/08/2024	<a href="#">430</a>		Ammementorp, Bob	Applecarts	0411		\$0.58	\$0.25	\$0.33	Partial
<input type="checkbox"/>	08/10/2023	<a href="#">422</a>		Abbott, Alvy	Real Estate Millions	0359	✓	\$5,000.00	\$0.00	\$5,000.00	OVERDUE
<input type="checkbox"/>	05/30/2023	<a href="#">420</a>		Ammementorp, Bob	Applecarts	0411		\$70.00	\$25.00	\$45.00	OVERDUE
<input type="checkbox"/>	05/01/2023	<a href="#">413</a>		Aanderson, Jeff	Plumbing	0401		\$200.00	\$0.00	\$200.00	OVERDUE



## Reporting

The Reporting page along with Dashboard and Reports are all fully functional, allowing you to export data.

FIRM CENTRAL

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0:00 88

Kevin G

HOME MATTERS CONTACTS DOCUMENTS CALENDAR TIME & BILLING ACCOUNTING REPORTING ADMIN

Search Firm Central

Dashboard Reports

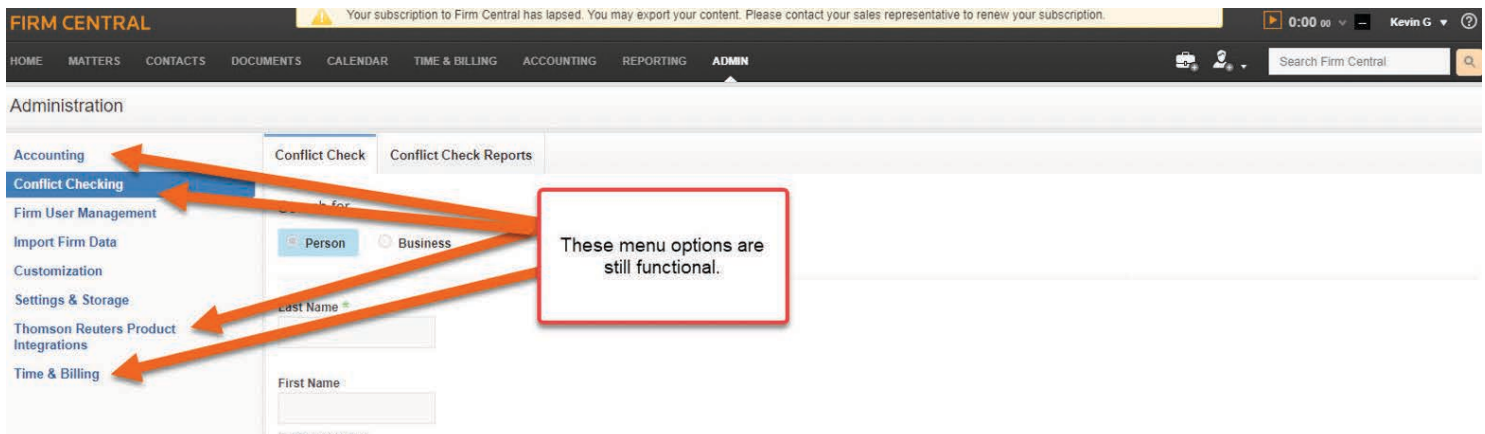
## Reports

[How do I customize my report?](#)

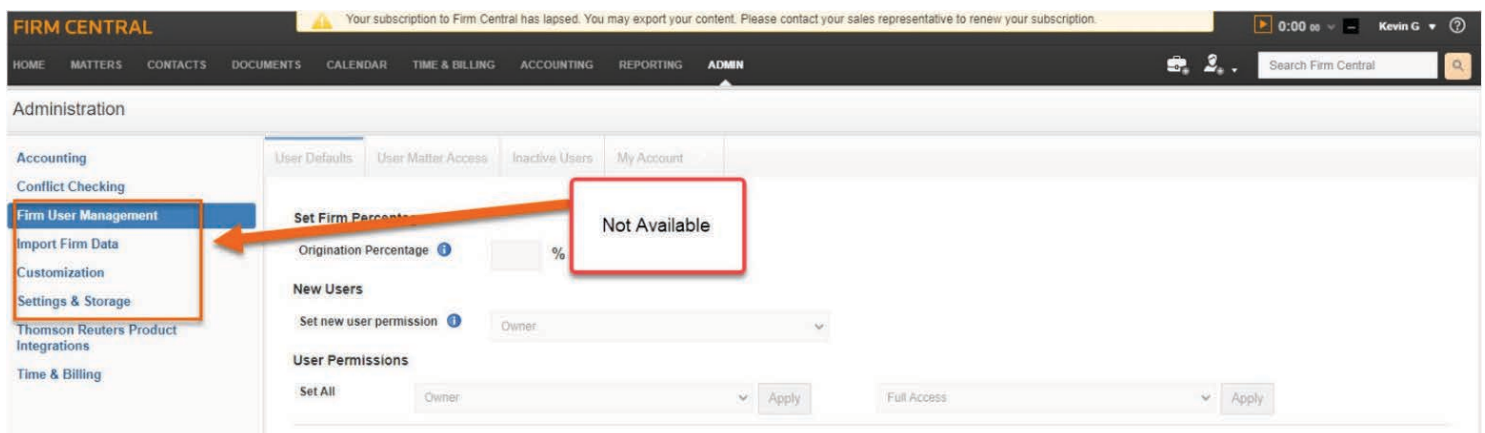
Report	Description	Category	
<a href="#">Time by User</a>	View details of all time entries for a single user or all users during a selected period of time. Optional ability to view time entries for inactive/deleted users.	Time and Billing	<button>Run</button>
<a href="#">Time by Client</a>	View details of all time entries for a single client during a selected period of time. Clients which have been marked as inactive are not included as a selection option.	Time and Billing	<button>Run</button>
<a href="#">Time by Matter</a>	View details of all time entries for a single matter during a selected period of time. By default closed matters are included in the selection drop down list.	Time and Billing	<button>Run</button>
<a href="#">Collection Realization by User</a>	View the details of billed, written off, and collected fees with realization rates broken down by invoices for a selected time frame. Will only include invoices on which a payment/collection has been made in the selected date range. The reports can be run for a single user or for all. The amount due column will always show the current amount due for the invoice regardless of the selected date range. For a partial payment the order in which payment is applied to the invoice is taxes, expenses, fees, and finance charges respectively. For a partial write off or credit the order in which the invoice is written off is finance charges, fees, expenses, and taxes. This report does not show payments or adjustments made to finance charges, expenses or taxes. Optional ability to view collection realization for inactive/deleted users.	Time and Billing	<button>Run</button>
<a href="#">Write Offs</a>	View details for any discounts, credits or write offs applied to an invoice over a selected time period, or where a prebill has been entirely written-off. View totals for all clients or select to view for a single client. Clients which have been marked as inactive are not included as a selection option. By default closed matters are included in this report.	Time and Billing	<button>Run</button>
<a href="#">Collection Realization by Matter or Client</a>	View the details of billed and collected fees and expenses with realization rates broken down by invoices for a selected timeframe. Only includes invoices where a payment/collection has been made in the selected date range. The report can be run for a single matter, single client or for all. The amount due column will always show the current amount due for the invoice regardless of the selected date range. This report does not show payments or adjustments made to finance charges or taxes. For a partial payment the order in which payment is applied to the invoice is taxes, expenses, fees, and finance charges respectively. For a partial write off or credit the order in which the invoice is written off is finance charges, fees, expenses, and taxes. Optional ability to also view closed matters. Clients which have been marked as inactive are not included as a selection option.	Time and Billing	<button>Run</button>

## Administrative Menu

There should not be a need to make global edits in the Administrative Menu. However, if you do, there is some limited ability to do so. The Administrative Menu options that are still functional are Accounting, Conflict Checking, Product Integration, and Time & Billing including all the sub tabs.



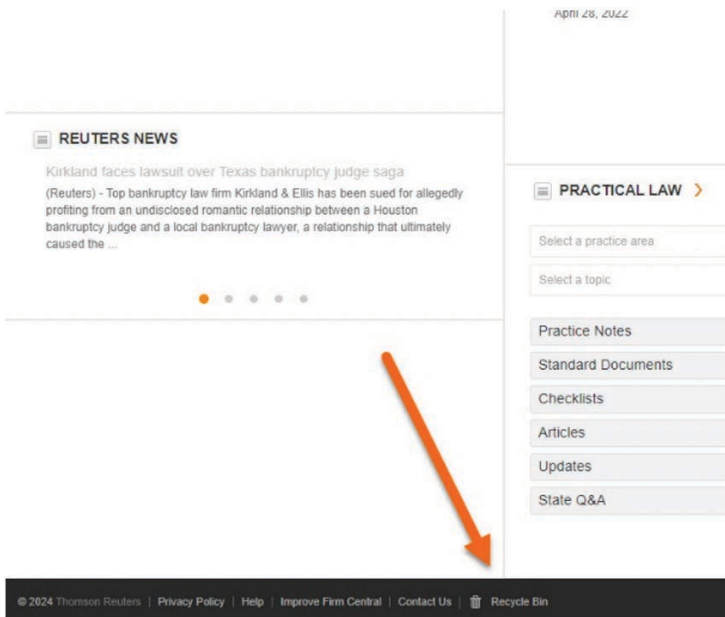
Firm User Management, Import Firm Data, Customization, and Settings & Storage are all nonfunctional.





## Recycle Bin

Lastly, the Recycle Bin is fully functional. This option is found on the bottom of every page.



Any user can "Restore" a document. However, you need to be logged in as Administrator to Empty the Recycle Bin or Delete items.

A screenshot of the Firm Central Recycle Bin interface. The header shows "FIRM CENTRAL" and a subscription status message. The main content area is titled "Recycle Bin (75)". On the left, there are filters for Categories (Contacts, Folders, Documents, Matters) and Users (Arochi, Karen; Pettersen, Bill; King, Andre). The main table lists deleted items with columns for Title, Type, Date Deleted, and a "Restore" button. An orange arrow labeled "1" points to the "Empty Recycle Bin" button. Another orange arrow labeled "2" points to the "Restore" button for the item "LOAN BUDGET.xlsx".

TITLE	TYPE	DATE DELETED	RESTORE
TEST CENTRAL	Client	3/08/2023 2:00:43 pm Karen Arochi	Restore
CENTRAL VS WEST CENTRAL	Matters	3/08/2023 1:53:38 pm Karen Arochi	Restore
LOAN BUDGET.xlsx Copyright, Molly W.	Documents	2/21/2023 12:49:27 pm Karen Arochi	Restore
LOAN BUDGET.xlsx Copyright, Molly W.	Documents	2/16/2023 1:23:54 pm Karen Arochi	Restore
LOAN BUDGET.xlsx	Documents	1/30/2023 12:50:37 pm	Restore