Extracting Firm Data from Firm Central

User Guide

As a law firm leaving Firm Central, it is imperative that your data be exported and downloaded BEFORE your 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 subscription, please refer to Page 36 in this document under the section titled "Exporting Data from a Lapsed Firm Central subscription." We recommend you first export or download a list of all clients and cases.

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Steps to assign an Admin to All Matters.

For one person to extract firm data from Firm Central, that person must be assigned as an Admin for all Matters. To add an Admin to All Matters you should have access as an Administrator.

- 1. Enter your OnePass username and password to gain access to Firm Central.
- 2. Once you have provided the credentials, you will land on the Firm Central Home page.
- 3. Select the profile menu in the upper right corner.
- 4. Select "Admin" from the drop-down menu.
- 5. Upon selection of Admin, you will be asked to enter your OnePass username and password again to gain access to the rights of an Admin user.

FIRM CENTRAL		▶ 0:00 ∞ ∨ 2 FC Admin01 ▼ ⑦
HOME MATTERS CONTACTS DOCUMENTS CALENDAR TIME		Preferences
	- TASKS . +	Admin Sign Out
ALL DAY	Completed (4) Sort by Due Date Clear All	Firm-rentral will be discontinued as of September 30th,
4 PM 5 PM 6 PM	Thursday, Nov 14, 2019	date. After careful consideration, we have decided to wind
7 PM 8 PM	hgkg I PrVendor345 Assigned To: FC Admin2 November 14, 2019	
9 PM 10 PM	Friday, May 15, 2020 Challocha O'hare O'hare Client o hare	Documents (22)
11 PM	Assigned To: FC Admin01 May 15, 2020	PeVendor345 close matter 4/ PeVendor345 close matter 4 Test jq.docx /test_AVA_JQ/test jq/ ahar, Ohare Ohare Claint test_AVA_JQ
THOMSON REUTERS WESTLAW	No Date	Test jq.docx /test_AVA_JQ/Test/
Jurisdiction: All States Change RECENT SEARCHES AND DOCUMENTS	Task1 IIICIIII BusinessName	Inv 27244 - Matter 1155175 - 10132021.pdf /Matter 101321011033/Time & Billing Invoices/ 1013010705gUG, Ckent Matter 101321011033
Leave Laws: California Practical Law State Q&A 1-506-5986 November 15, 2023 12:00 am November 24, 2023 7:20 pm		NOTIFICATIONS
o law		NO NEW HOURCADORS (ODay

Steps to Assign Admin

Once you have logged in as an Admin user, you will see the "ADMIN" tab in the main menu section.

- 1. Select "ADMIN" from the main menu.
- 2. Select "Firm User Management" to provide access to existing matters for an Admin user.
- 3. Navigate to the User Matter Access section.
- 4. Start by selecting the username from the "Firm User" drop down menu.
- 5. Select the default matter permission as "Owner" from the "Set As" drop down menu.
- 6. Set the "Matter Team" toggle button to "include".
- 7. Select "All Matters" from the drop down menu.
- 8. Click the check box to select All Matters.

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HOME MATTERS CONTACTS DOCU	MENTS CALENDAR TIME & BILLING		😂 🉎 🚬 Search Firm Central	<u> </u>
Administration			1	
Accounting	User Defaults User Matter Access	Inactive Users My Account 🕐		
Conflict Checking				
Firm User Management	Apply user permission and team member stat	tus to selected matter(s). This will overside and existing permissions or team me	embership.	
Import Firm Data	Firm User *			_
Customization	Enter a User name	~ 4		
Settings & Storage		4		
Thomson Reuters Product Integrations	Set As * select a role	~ 🗕 5		
Deadline Assistant				
Time & Billing	Matter Team	6		
Product Integrations	Include Exclude	0		
2	Select Matters			
	Enter a Matter name	Selected Matters		
	Open Matters	~		
	Filter by Practice Area	 Select at least one Matter from the left. 		
	Select all 14193	Reset Filters		
	document-files- demo-path			
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	i#CI_CG#I	1		
8	AutoDeductMatter!	\checkmark		
	IBusinessTest!	\checkmark		
	icii	$\checkmark =$		
	Save Save & Continue Cancel	1		



- 9. You can see all Matters moved to "Selected Matters" section
- 10. Then click on the Save button to assign all selected Matters to the user. This may take some time depending on how many Matters you have selected.
- 11. You will see a successful message once all the Matters have been assigned to the Admin user.

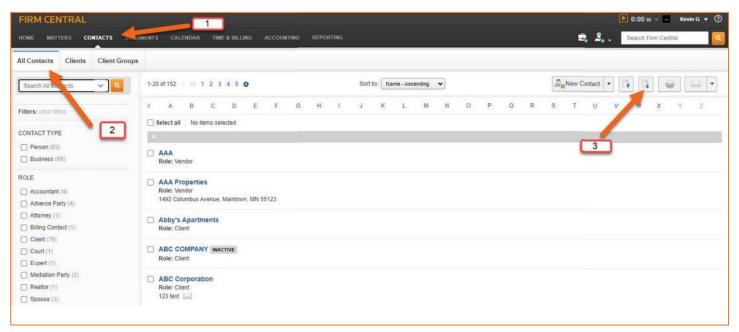
			😓 🤰 🚬 Search Firm Central
dministration	Surger	sfully updated selected Matters, Close	
ccounting	User Defaults User Matter Access Inactiv	skiry updated serected metaris. Crose	
onflict Checking			
irm User Management	Apply user permission and team member status to selected matter(s). T	his will override any existing permissions or team membership.	
nport Firm Data			
ustomization	Firm User *		
ettings & Storage	Harish B V		
homson Reuters Product negrations	Set As *		
	Owner 🗸		
eadline Assistant	Matter Team		
ime & Billing	Include Exclude		
roduct Integrations			
	Select Matters		
	Enter a Matter name 🗸 Set	ected Matters Remove All	
	Enter a watter name		
	All Matters 🗸	1118113549vlL	
	Filter by Practice Area 🗸 🖷	Zero Rate Matter X 1212040637gRE	
	Select all 14240 Reset Filters		
	IIIIIIIIMatter-Long-multifolder- ✓ ▲	Zero Rate Matter X 1212041424OAy	
	document-files- demo-path	Zero Rate Matter X	
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	-	Zero Rate Matter	
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	i #CI_CG#I ✓	1212131258zmn Zero Rate Matter	
	INCI_CG#I ✓ IAutoDeductMatterI ✓ IBusinessTestI	1212131258zmn Zero Rate Matter	

Exporting Clients and Contacts

To export the client and contact list:

- 1. Select "CONTACTS" from the main menu.
- Then select the "All Contacts" tab. 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 Contacts list to a .CSV file.





From client groups tab:

- 1. Select "CONTACTS" from the main menu.
- 2. Then select the Client Groups tab.
- 3. Click on Export Client Groups icon. This will begin to export all the Client Groups in a .CSV file.

HOME MATTERS CONTACTS DOCUM	ients calendar time & Billing accounting reporting
All Contacts Clients Client Groups	
Search Client Groups	1-46 of 46 0 1 0 1 0 Export Client Groups:
	010102312
	A Beautiful Mind's Group 27493
	A Beautiful Mind's Group, 14584
2	American Psycho's Group 28601
	Atmosphere's Group 2763
	Basil Exposition's Group 59383
	Bernie Sanders's Group 77114
	Brandine Spuckler's Group 67631
	Carl Carlson's Group 4561
	Carl Grissom's Group 31203

Exporting Matters

To export Matters list:

- 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.



FIRM CENTRAL			🕨 0:00 👓 👻 FC Admin1 👻 🕜
HOME MATTERS CONTACTS DOC	UMENTS CALENDAR TIME & BILLING ACCOUNTING		🚉 🤰 🚬 Search Firm Central 🔍
All Matters My Matters	1		
Search All Matters 🗸 🔍	1-100 of 13757 0 1 2 3 4 5 O	Sort by: Open Date (Most Recent)	💿 New Matter
clear filters	Select all No items selected		elect Export Option: 🔻
OPEN/CLOSED 2	Edutell	1049026 Client, Andrew J	201
Closed (1)			4 July 7, 2024
✓ Op ₁ , (2756)	Tech share	1049023 James, Lilly	OPEN June 28, 2024
USERS			
o Select Users	🗌 Wise skills	1049019 James, Lilly	OPEN June 28, 2024
DATE OPENED All			
PRACTICE AREA	Study rig	1049021 James, Lilly	OPEN June 28, 2024
Admiralty and Maritime Law (191)		1049017 James, Lilly	OPEN
ADR/Mediation (29)	Tuter geeks	1049017 James, Lilly	OPEN June 28, 2024
Agriculture Law (17)			
Antitrust/Unfair Competition (12)	Tech mentor	1049014 Smith, Jones	OPEN
Banking and Commercial Finance (13)			June 19, 2024
e obeu more	Techify learning	1049016 Smith Jones	OPEN

Export Matter Permissions, Billing Rates, Originating Attorney, Matter Notes and Matter Tasks

- 1. Select "MATTERS" from the main menu.
- 2. Then select All Matters or My Matters.
- 3. Make sure both Open matters and Closed matters are selected.
- 4. Click on Select Export Option.
- 5. Drop down menu contains Matter Permissions, Matter Notes, Matter Tasks, Billing Rates, Primary Attorneys.
- 6. You can filter the matters according to the Practice area.
- 7. You can also sort the matters alphabetically by matter, client names, client groups, or by the date opened (Most recent first, Oldest first).

FIRM CENTRAL			▶ 0:00 00 ∨ 2 FC Admin1 ▼ (
HOME MATTERS CONTACTS I	DOCUMENTS CALENDAR TIME & BILLING ACCOUNT	ING REPORTING	Search Firm Central
All Matters My Matters	1		
Search My Matters	1-100 of 13745 0 1 2 3 4 5 O	Sort by: Open Date (Most Recent)	😮 New Matter
clear filters	Select all 1 item selected clear selected	4	Select Export Option: •
Closed (1)	2 Edutell	1049026 Client, Andrew J	OPEN July 7, 2024
Closed (1)	Tech share	1049023 James, Lilly	OPEN June 28, 202 ² Matter Tasks
o Select Users	Uise skills	1049019 James, Lilly	OPEN June 28, 202/
ATE OPENED AII 3	Study rig	1049021 James, Lilly	OPEN June 28, 202
Admiralty and Maritime Law (189) ADR/Mediation (27) Agriculture Law (16)	Tuter geeks	1049017 James, Lilly	OPEN June 28, 2024
Antitrust/Unfair Competition (12) Banking and Commercial Finance	Tech mentor	1049014 Smith, Jones	OPEN June 19, 2024

From Export Matter Permissions:

"Matter Permissions" will download the list of Matter Permissions as .CSV file.

- 1. Click on any radio button to Export Open or Closed Matters as shown below.
- 2. Click on "Export Now".



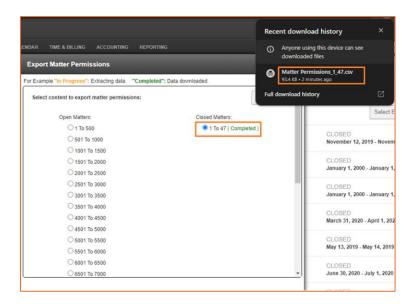
or Example "In Progress": Extracting data. "Complete	d": Data downloaded.
Select content to export matter permissions:	2 Export Now
Open Matters:	Closed Matters:
O 1 To 500	1 To 47
○ 501 To 1000	
O 1001 To 1500	
O 1501 To 2000	1
O 2001 To 2500	
O 2501 To 3000	
O 3001 To 3500	
O 3501 To 4000	
O 4001 To 4500	
O 4501 To 5000	
○ 5001 To 5500	
◯ 5501 To 6000	
○ 6001 To 6500	
O 6501 To 7000	

3. You can also see that the status of the matter will show "In Progress," indicating that the selected matters are being Extracted.

Data downloaded.
Extracting
Closed Matters:
1 To 47 (In Progress)

- 4. As soon as the download is completed, the status will change to "Completed" and will be highlighted in green, indicating that the selected matters have been downloaded to your local drive. You can also confirm the download from the browser's default download location.
- 5. The downloaded file is saved with the file name "Matter Permissions_Open_1_500" file for Open Matters and, "Matter Permissions_Closed_1_47" for Closed Matters, with the count of files downloaded as .CSV file.





- 6. The .CSV file contains,
 - a. Matter Number.
 - b. Matter Name.
 - c. Participants Name.
 - d. Status of Matter.
 - e. User Role of Matter Permissions.

A	D	C C	U	E
Matter Number	Matter Name	Participants Name	Status	Role
1016724	Tweed Reg	Alexs Rykov	Closed	OWNER
1016724	Tweed Reg	Jimmy Zoe	Closed	CONTRIBUTOR
1016724	Tweed Reg	John Sue	Closed	EDITOR
1088724	Federal Energy	Alexs Rykov	Closed	OWNER
1088724	Federal Energy	Jimmy Poole	Closed	CONTRIBUTOR
1088724	Federal Energy	John Powell	Closed	EDITOR
1088724	Federal Energy	Mark Russell	Closed	CONTRIBUTOR
1199653	CsvImport_Corp_1028	Alexs Rykov	Closed	OWNER
1199653	CsvImport_Corp_1028	Jimmy Terry	Closed	EDITOR
1199653	CsvImport_Corp_1028	John Walker	Closed	EDITOR
1199653	Csvimport Corp 1028	Mark Young	Closed	CONTRIBUTOR

From Export Matter Notes:

Export Matter Notes will download the list of existing Matter Notes that have been created. This will be saved as a .zip file.

- 1. Click on any radio button to Export Open or Closed Matters.
- 2. Click on Export Now.





Export Matter Notes	x
	ich have matter notes. If you would prefer to download this data in t the Export Documents button in the top right corner. The bottom left atter Notes.
For Example "In Progress": Extracting data.	'Completed": Data downloaded.
Select content to export matter notes:	2 Export Now
Open Matters:	Closed Matters:
O 1 To 366	O 1 To 12
	1

3. You can also see that the status of the export will show "In Progress," indicating that the selected notes are being Extracted.

or Example "In Progress": Extracting data. "Complet	ed": Data downloaded.
Select content to export matter notes:	Extracting
Open Matters:	Closed Matters:
○ 1 To 366	I To 12 (In Progress)

4. As soon as the download is completed, the status will change to "Completed" and will be highlighted in green, indicating that the selected Matter Notes have been downloaded to your local drive. You can also confirm the download from the browser's default download location.



	Downloads	Ľ Q … ♪
NDAR TIME & BILLING ACCOUNTING REPOR	AllMatterNotes_C	losed_1_12.zip
Export Matter Notes	See more	
Note: Showing only open and closed matters which have bulk, please go to the Documents tab, and select the Exp adio buttons will give you an option to Export Matter Note	art Documents button in the top right corner. The bottom left	O New Matter
For Example "In Progress": Extracting data. "Complet	ed": Data downloaded.	Select Expo
Select content to export matter notes:	Export Now	
Open Matters	Closed Matters	OPEN July 24, 2024
O 1 To 366	I To 12 (Completed)	OPEN July 24, 2024
		OPEN July 22, 2024
		OPEN July 22, 2024
		OPEN July 19, 2024
		OPEN July 14, 2024
		OPEN July 12, 2024
		OPEN July 7, 2024

5. The downloaded file is saved with the file name "AllMatter Notes_Open_1_366" for Open Matters and "AllMatter Notes_Closed_1_12" for Closed Matters, with the count of files downloaded.

$\leftarrow \rightarrow$	\uparrow	С		>	Downloads	>
🕀 New 🗸	*	C	Ĩ	A) ©	Ŵ
A Home		√ Too		tterN	otes_Closed_1	_12

- 6. You will need to use a decompression utility to unzip these files. (see page 19)
- 7. The .zip file contains the files of Matter Notes in .CSV file format.
- 8. The .CSV file contains
 - a. Count Number.
 - b. Client Id.
 - c. Matter Number.
 - d. Matter Name.
 - e. Matter Notes.
 - f. Created By.
 - g. Created Date and Time.

Note: You can also download Matter Notes in bulk, from "DOCUMENTS" menu. (see page 18)

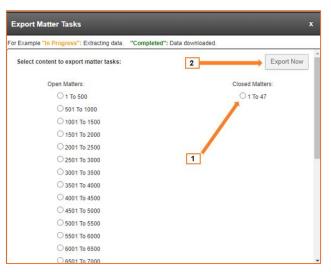
A		В	C	D	E	F	G
No		Client Id	Matter Number	Matter Name	Note	Created By	Created Date
	1	59071	93581	Study rig	A study rig is a specialized piece of equipment used in the oil and gas industry for conducting scientific research and data collection in offshore environments. The main platform that supports the other components of the study rig. Drilling Equipment:- Includes drills, drill bits, and drill pipe used to extract core samples and drill holes for scientific research.	Admin User	2/27/2024 23:53



From Export Matter Tasks:

"Matter Tasks" will download the list of existing Matter Tasks that have been created. This will be saved as a .zip file.

- 1. Click on any radio button to Export Open or Closed Matters.
- 2. Click on Export Now



3. You can also see that the status of the matter will show "In Progress," indicating that the selected matters are being Extracted.

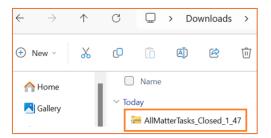
Example "In Progress": Extracting data. "Complete	d": Data downloaded.
Select content to export matter tasks:	Extracting
Open Matters:	Closed Matters:
O 1 To 500	1 To 47 (In Progress)
○ 501 To 1000	
O 1001 To 1500	
O 1501 To 2000	
O 2001 To 2500	
O 2501 To 3000	
O 3001 To 3500	
◯ 3501 To 4000	
O 4001 To 4500	
◯ 4501 To 5000	
○ 5001 To 5500	
○ 5501 To 6000	
O 6001 To 6500	

4. As soon as the download is completed, the status will change to "Completed" and will be highlighted in green, indicating that the selected matters have been downloaded to your local drive. You can also confirm the download from the browser's default download location.



	Recent download history	\otimes
NDAR TIME & BILLING ACCOUNTING REPORTING	Anyone using this device can downloaded files	see
Export Matter Tasks For Example "In Progress": Extracting data. "Completed": Data do		eep >
Select content to export matter tasks:		eep >
Open Matters:	Closed Matters: Insecure download blocked	
O 1 To 500	1 To 47 (Completed	
O 501 To 1000	Matter Permissions_1_47.csv 93.4 KB + 10 minutes ago	
O 1001 To 1500		
O 1501 To 2000	Full download history	
O 2001 To 2500	January 1, a	2000 - January
C 2501 To 3000	CLOSED	
O 3001 To 3500		2000 - January
O 3501 To 4000		
O 4001 To 4500	CLOSED March 31, 2	020 - April 1, 20
O 4501 To 5000		
○ 5001 To 5500	CLOSED	
O 5501 To 6000	May 13, 201	9 - May 14, 201
○ 6001 To 6500	CLOSED	
O 6501 To 7000		20 - July 1, 202

5. The downloaded file is saved with the file name "Matter Tasks_Open_1_500" file for Open Matters and, "Matter Tasks_Closed_1_47" for Close Matters, with the count of files downloaded.



- 6. You will need to use a decompression utility to unzip these files.
- 7. The .zip file contains the files of Matter Tasks in a .CSV file,
- 8. The .CSV file contains:
 - a. Count Number.
 - b. Matter Number.
 - c. Title.
 - d. Matter Name
 - e. Assigned Date.
 - f. Client Name.
 - g. Create By Name.
 - h. Description of Task.

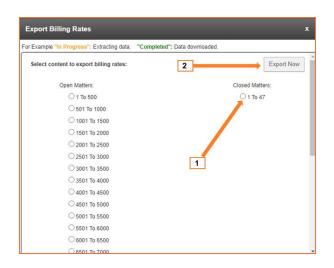
А	В	С	D	E	F	G	Н
No	Matter Number	Title	Matter Name	Assigned Date	Client Name	CreatedByName	Description
1	876543	Task 1	CsvImport_Corp_1028	2/27/2024 23:50	Nicola White	Alexs Rykov	Check mails outside mailbox
2	876543	Task 2	CsvImport_Corp_1028	1/24/2024 22:51	Nicola White	Alexs Rykov	Clean up parked tasks
3	846556	Task 1	Tweed Reg	2/27/2024 23:52	Mark Calaway	Jimmy Wilson	Complete customer calls

From Export Billing Rates:

"Billing rates" will download the list of Billing Rates as .CSV file.

- 1. Click on any radio button to Export Open or Closed Matters.
- 2. Click on Export Now.



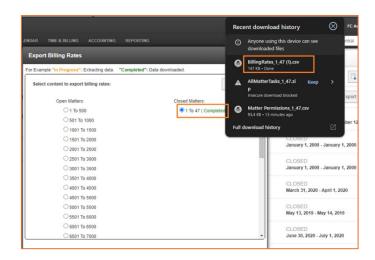


3. You can also see that the status of the matter will show "In Progress," indicating that the selected matters are Extracting.

Example "In Progress": Extracting data. "Complete	d": Data downloaded.
Select content to export billing rates:	Extracting
Open Matters:	Closed Matters:
O 1 To 500	1 To 47 (In Progress)
○ 501 To 1000	
O 1001 To 1500	
O 1501 To 2000	
O 2001 To 2500	
O 2501 To 3000	
O 3001 To 3500	
O 3501 To 4000	
O 4001 To 4500	
○ 4501 To 5000	
○ 5001 To 5500	
◯ 5501 To 6000	
O 6001 To 6500	
O 6501 To 7000	

- 4. As soon as the download is completed, the status will change to "Completed" and will be highlighted in green, indicating that the selected matters have been downloaded to your local drive. You can also confirm the download from the browser's default download location.
- 5. The downloaded file is saved with the file name "Billing Rates_Open_1_500" for Open Matters and "Billing Rates_Closed_1_47" for Close Matters, with the count of files downloaded as .CSV file.





- 6. The .CSV file contains:
 - a. Matter Number.
 - f. Matter Name.
 - g. Matter Status (Open or Closed).
 - h. User Id.
 - i. Colleague.
 - j. User Role of Matter Permissions.
 - k. Matter Rate Value.
 - I. User Rate Value.
 - m. Client Rate Value.

А	В	С	D	E	F	G	Н	l.
Matter Number	Matter Name	Matter Sta	User Id	Colleague	Role	Matter Rate Value	User Rate Value	Client Rate Value
971724	Tweed Reg	Closed	i0adc18130000013	Dominic Allan	OWNER	100	400	100
971724	Tweed Reg	Closed	i0adc18130000013	Cameron Anderson	CONTRIBUTOR	200	300	200
971724	Tweed Reg	Closed	i0adc18130000013	Dylan Bailey	EDITOR	400	200	400
1017776	CsvImport_Corp_1028	Closed	i0ad2e92e0000018	Harry Ball	OWNER	300	400	300
1017776	CsvImport_Corp_1028	Closed	i0ad2e92e0000018	Donna Bell	CONTRIBUTOR	100	300	100
1017776	CsvImport_Corp_1028	Closed	i0ad2e92e0000018	Mark steve	EDITOR	200	200	200

From Export Primary Attorneys:

"Primary Attorneys" will download the list of Primary Attorneys as .CSV file.

- 1. Click on any radio button to Export Open or Closed Matters.
- 2. Click on Export Now.



or Example "In Progress": Extracting data. "Con	pleted": Data downloaded.
Select content to export primary attorneys:	2 Export Now
Open Matters:	Closed Matters:
◯ 1 To 500	O 1 To 10
○ 501 To 1000	
○ 1001 To 1500	
○ 1501 To 2000	
○ 2001 To 2500	1
○ 2501 To 3000	
○ 3001 To 3500	
○ 3501 To 4000	
○ 4001 To 4500	
◯ 4501 To 5000	
○ 5001 To 5013	

3. You can also see that the status of the matter will show "In Progress," indicating that the selected matters are being Extracted.

Export Primary Attorneys	x
For Example "In Progress": Extracting data.	"Completed": Data downloaded.
Select content to export primary attorned	/s:
Open Matters:	Closed Matters:
◯ 1 To 500	1 To 10 (In Progress)
○ 501 To 1000	
◯ 1001 To 1500	
◯ 1501 To 2000	
○ 2001 To 2500	
○ 2501 To 3000	
◯ 3001 To 3500	
◯ 3501 To 4000	
◯ 4001 To 4500	
◯ 4501 To 5000	
○ 5001 To 5013	
l	*

- 4. As soon as the download is completed, the status will change to "Completed" and will be highlighted in green, indicating that the selected matters have been downloaded to your local drive. You can also confirm the download from the browser's default download location.
- The downloaded file is saved with the file name "Primary Attorneys_Open_1_500" file for Open Matters and "Primary Attorneys_Closed_1_47" for Close Matters, with the count of files downloaded as .CSV file.



ENDAR TIME & BILLING REPORTING	Anyone using this device can see downloaded files IrimaryAttorneys_Closed_1_10.csv I398 - Oone
Export Primary Attorneys For Example "In Progress": Extracting data. "Completed": Data downloaded.	
Select content to export primary attorneys:	Export Now
Open Matters: Closed Matters:	Select
0 1 To 500)
○ 501 To 1000	OPEN March 20, 2024
○ 1001 To 1500	
○ 1501 To 2000	OPEN
○ 2001 To 2500	June 1, 2017
O 2501 To 3000	
○ 3001 To 3500	
○ 3501 To 4000	OPEN June 1, 2017
○ 4001 To 4500	
○ 4501 To 5000	
O 5001 To 5013	OPEN June 1, 2017
	OPEN

- 6. The .CSV file contains,
 - a. Matter Number.
 - b. Matter Name.
 - c. Originating Attorney.d. Lead Attorney.

А	В	С	D
Matter Number	Matter Name	Originating Attorney	Lead Attorney
16439	Tech share	Connor Abraham	Dominic Allan
16457	Edutell	Boris Alsop	Cameron Anderson
16455	Skill wise	Dan Arnold	Dylan Bailey
16447	Study rig	Gordon Ball	Harry Ball
16451	Tuter geeks	Adam Bell	Donna Bell
10725	Tech mentor	Ella Bower	Emma Bower
16449	Tweed rig	Ava Burgess	Carolyn Burgess





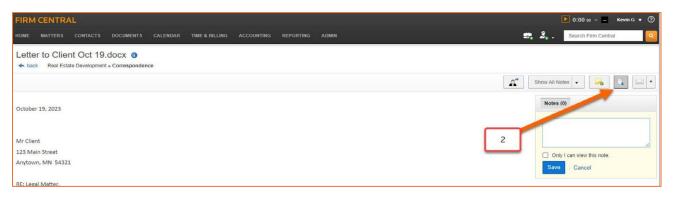
Exporting Documents

Download a single document from a matter in Firm Central:

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

HOME MATTERS CONTACTS DOCUMENTS CALENDAR TIME & BILLING ACCOUNTING REPORTING ADMIN	🕨 0:00 🗤 🚽 Kevin G 🔻 🕐	
HOME MATTERS CONTACTS DOCU	MENTS CALENDAR TIME & BILLING ACCOUNTING REPORTING ADMIN	Search Firm Central
Search Documents	Correspondence Rename	
Filters clear filters	Sort by: Added Date - Descending 🖌	🐔 📴 📴 🖏 🗙 🖂 •
FILE TYPE	Select all No items selected	
Microsoft Word(1)	NTS CALENDAR TIME & BILLING ACCOUNTING REPORTING ADMIN COrrespondence Rename Soft by: Added Date - Descending Added Date - Descending Correct all No items selected Correct 13, docx	
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2. In the upper right corner click on the Export icon. Your document will be downloaded in its original format.



Download Bulk Documents in Firm Central

Bulk extraction of Matter documents can only be performed by an Admin user. Make sure the Admin user is assigned to all Matters to perform bulk downloads.

- 1. Select "Profile" after login and select "Admin" from the drop-down menu. Upon selection of Admin, you will be asked to enter your OnePass username and password again to gain access to all the rights of an Admin user.
- 2. Select "DOCUMENTS" from the main menu.



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	Closed Matters	
© 2024 Thomson Reuters Privacy Policy Help Im	nprove Firm Central Contact Us Uplaad Queue 🏢 Recycle Bin	O THOMSON REUTERS

- 3. On the selection of Documents from the main menu, you will see the Extract Documents icon on the right-hand side.
- 4. Click the Extract Documents icon.

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HOME MATTERS CONTACTS DOCU	MENTS CALENDAR TIME & BILLING ACCOUNTING REPORTING ADMIN	🚓 🍰 🚬 Search Firm Central
Search Documents Q	All Documents	Extract Documents:
Filters	My Documents	
No filters available to further refine the list.	_	
	Firm Library	
	Copen Matters	
	Closed Matters	
	inactive Users	

- 5. After selecting the "Extract Documents" icon, a dialog box will open, allowing you to select the matters from the "Select Content to Extract" section to download documents.
 - a. My Documents: This will download the My Documents content from all users.
 - b. Firm Library: This will download all documents in the Firm Library.
 - c. Open Matters: This will download the documents of Open Matters.
 - d. Closed Matters: This will download the documents of Closed Matters.
 - e. Open Matter Notes: This will download Matter Notes Created for Open Matters.
 - f. Closed Matter Notes: This will download Matter Notes Created for Closed Matters.
 - g. Calendar Events: This will download Calendar Events created.

Note: The Matters are grouped in alphabetical order, in order to meet the download file size limitations of various internet browsers. Your downloads will be compressed into zip folders which you can unzip, once you place the downloaded files in their new location.

- 6. The Execution history contains.
 - a. Start and End time: When the extraction has started and ended.
 - b. Folder Name: The extracted Documents folder name and file count.
 - c. Status: Status of matters downloaded.
 - d. Total downloaded data: File size of downloaded matters, Number of Files and Folders present.



- 7. The dialog box will display the status of your downloaded files.
 - a. In Progress: Means the extraction has started.
 - b. Ready to Download: Means the files have been extracted successfully from Firm Central and are ready to be downloaded to your local drive.
 - c. Completed: Means the files have been successfully downloaded to your local drive.
- 8. You can also see the status and size of matters in "Select content to extract" section on left side, indicating whether the matter is In Progress, Ready to Download, or Completed.
- If the selected Matters data exceeds 2-3 GB, you will see multiple blue buttons for extracted matters and multiple green buttons for matters that have been downloaded to the local drive in the execution history for the selected matters.

Extract Documents	_		x
Note: The downloaded data file will be deleted from this page after	10 days. If you do not download the file within that time, yo	will have to repeat the data download process.	*
For Example "In Progress": Extracting data. "Ready To Download": Da	ta available for download. "Completed": Data downloaded.		
Select content to extract: Extract Now My Documents (In Progress)	Start Time: July 1, 2024 3:43 pm	Execution History End Time:	
Firm Library	My Documents: All	Status: in Progress 45 %	\exists
Open Matters 1 To 1000 (Completed) - 463.78 MB 0 1001 To 2000	Start Time: June 30, 2024 9:00 am Closed Matters: 1 - 47	End Time: June 30, 2024 10:50 am Status: Ready to download	
2001 To 3000 2001 To 3000 3001 To 4000	Total Downloaded Data (666.11 MB) : 🛃 Closed Matter		
○ 3001 10 4000 ○ 4001 To 5000 ○ 5001 To 6000	Closed Matters 1 to 47 - Part 2 - 613.36 MB [820 Files,	38 Folders)	
○ 6001 To 7000	Start Time: June 28, 2024 10:23 am Open Matters: 1 - 1000	End Time: June 28, 2024 12:50 pm Status: Completed	
Closed Matters	Total Downloaded Data (463.78 MB) : 👱 Open Matters		
Open Matters Notes Closed Matters Notes	坐 Open Matters 1 to 1000 - Part 2 - 136.52 MB [345 Files	18 Folders]	- 11
Calendar Events	1		

Download bulk Documents:

You can download all Matter Documents, Open Matter Notes, Closed Matter Notes and Calendar Events in a bulk, as shown in the picture below.

- 1. Select the radio button from the list of options you want to download.
- 2. Click "Extract Now" Button.
- 3. The selected matters will start extract, and you can see the status of the matter as "In Progress" in the execution history, which indicates that the selected matters are being extracted.
- 4. After the extraction is complete, you will see that the selected items are marked with a "Ready to download" status, indicated by a blue button with the folder name, file size, and number of files and folders extracted, in the Execution History section. Click on the blue button to download the items to your local drive.
- 5. Once the download is complete, the button will change to green, indicating that the items have been successfully saved to your local drive.
 - Note: Do not close your browser while the download is In Progress.
- 6. Once the download is complete, you can download it as many times as you want by using the same "Completed" button, which is displayed in green.
- 7. The downloaded file will be saved as a .zip file on the local drive with the specified folder name. Note: If you don't download the data into your local drive within 10 days after it was placed in "Ready to download" status, you'll need to restart the process from the beginning by Extracting data from Firm Central again.



8. The extracted data will be downloaded to the default download location set in your browser. For most users, this will be the "Downloads" folder. To change the folder location, see page 47.

For Example "In Progress": Extracting data. "Ready To Download": Data available for download. "Completed": Data downloaded. Select content to extract: Extract Now My Documents (In Progress) Start Time: July 1, 2024 3:43 pm Firm brary My Documents: All	Execution History End Time: Status: In Progress 45 %)
My Documents (in Progress) Start Time; July 1, 2024 3:43 pm Firm prary My Documents; All	End Time:	1
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Open Matte	End Time: June 30, 2024 10:50 am	
1 To 1000 Completed) - 463.78 MB Closed Matters: 1 - 47	Status: Ready to download	
1001 To 2000 2001 To 3000 1 3001 To 4000 4001 To 5000 5000		
6001 To 7000 Start Time: June 28, 2024 10:23 am	End Time: June 28, 2024 12:50 pm	
Open Matters: 1 - 1000	Status: Completed	
Closed Matters O 1 To 47 (Ready to download) Total Downloaded Data (463.78 MB) : Open Matters 1 to	o 1000 - Part 1 - 327.26 MB [2202 Files, 102 Folders]	
Open Matters 1 to 1000 - Part 2 - 136.52 MB [345 Files, 18 F	Folders)	
O Closed Matters Notes		1

9. The data will be in the form of zipped bundle files. You will need to use a decompression utility to unzip these files.

Note: The Firm Central application is very flexible in permitting layering of folders for firms to organize documents within various matters. It is possible that this flexibility created file path lengths that are longer than Windows systems and some decompression utility applications can handle. If that is the case for your firm, you will need to take 2 actions:

10. Go to your registry settings and enable long file path names. Microsoft has a post about how to do this - <u>https://answers.microsoft.com</u> or

Follow the below steps:

- Open the Start menu and type "regedit." Launch the application.
- Navigate to HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Control\FileSystem
- Right-click the value "LongPathsEnabled" and select Modify.
- Change "Value data" from 0 to 1.
- Click OK.



	Registry Editor		Computer\HKEY_LOCAL_MACHINE\SYSTEM\C	urrentControlSet\Control\FileSystem		
1	Арр		ComputerName	Name	Туре	Data
			ContentIndex	ab (Default)	REG SZ	(value not set)
Sett	ings		CrashControl	B DisableDeleteNotification	REG_DWORD	0x00000000 (0)
			Cryptography	BilterSupportedFeaturesMode	REG_DWORD	0x00000000 (0)
	Region	>	DeviceClasses	LongPathsEnabled	REG_DWORD	0x00000001 (1)
1999 - C	Region		DeviceContainerPropertyUpdateEvents DeviceContainers	NtfsAllowExtendedCharacter8	REG DWORD	0x00000000 (0)
œ	C		DeviceContainers	100 NtfsBugcheckOnCorrupt	REG DWORD	0x00000000 (0)
Å₹	Set reg ional format	>	DeviceOverrides	NtfsCachedRunsBinMaxLengt	REG_QWORD	0x00000000 (0)
-			DevicePanels	1 NtfsCachedRunsDelta	REG QWORD	0x00000000 (0)
Å₹	Change your country or reg ion	>	DevQuery	NtfsCachedRunsInsertLimit	REG QWORD	0x00000000 (0)
			Diagnostics	NtfsCachedRunsLimitMode	REG QWORD	0x00000000 (0)
宇	See the current date and time	>	DmaSecurity	100 NtfsDefaultTier	REG DWORD	0x00000000 (0)
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			Errata	10 NtfsDisableEncryption	REG DWORD	0x00000000 (0)
Q	Reg - See more search results	>	FeatureManagement	10 NtfsDisableLastAccessUpdate	REG DWORD	0x80000002 (21474836
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0	regedit	>	HAL	NtfsEncryptPagingFile	REG DWORD	0x00000000 (0)
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🚏 Registry Editor			
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	nisableDeleteNotification	RE Value name:	
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DeviceContainerPropertyUpdateEvents	88 LongPathsEnabled	Rt LongPathsEnabled	1
DeviceContainers	NtfsAllowExtendedCharacter8	Rf Value data:	Base
DeviceGuard	19 NtfsBugcheckOnCorrupt	RE 1	 Hexadecimal
DeviceOverrides	NtfsCachedRunsBinMaxLengt	Rí	ODecimal
DevicePanels	10 NtfsCachedRunsDelta	Rŧ	
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EAS	ntfsDisableCompression	REG_DWORD	0x00000000 (0)
Els Els	🕫 NtfsDisableCompressionLimit	REG_DWORD	0x00000000 (0)
Errata	Representation 10 NtfsDisableEncryption	REG_DWORD	0x00000000 (0)
FeatureManagement	🕮 NtfsDisableLastAccessUpdate	REG_DWORD	0x80000002 (2147483650)
FileSystem	🕫 NtfsDisableLfsDowngrade	REG_DWORD	0x00000000 (0)

- 11. Use a decompression utility that can handle long file path names, such as 7Zip (<u>https://www.7-zip.org/</u>), which is an open-source application.
 - Downloaded files will include documents which have been uploaded to Matters in Firm Central. The documents will be in their originally uploaded format. Other data from your Firm Central account will be exported in .CSV files. The .CSV format files should enable mapping of the data to your new firm management application.

Note: Links contained in Matter folders to Westlaw research documents will not download the full Westlaw documents. You will be able to go to your Firm Central folders within Westlaw to get those documents.

Note: You need to have extra space in the file location when the file is Unzipped. (**Example**: If the zipped file size is 700MB, you should have at least 1-1.5GB of space on your local drive when it is unzipped.) Zip file compression is typically about 30%, but it can vary with the types of files.



Export data from the Home Page

From the Firm Central Home Page, you can email or print the data present on the home screen for Calendar, Tasks, and Notifications.

1. Select "HOME" from the main menu.

2.To export Calendar data: Click the icon to email, print or export data. This Calendar Widget is only a one-day snapshot, if you want to export all Calendar data, refer to the Calendar section (see page 23). 3.To export Task data: Click the icon to email or print data. You can use the drop-down menu to filter the email or print options.

4.To export Notifications data: Click 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.

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RECENT SEARCHES AND DOCUMENTS	Monday, Jan 13, 2020 Mordue homepage task 25182 January 13, 2020 Tuesday, Apr 28, 2020	WHAT'S NEW For maintenance reasons, Firm Central will be inaccessible on Saturday, August 10, 2024, from approximately 900pm to 1:03em Central Time on Sunday, August 11, 2024,

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.

4. 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.



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Real Estate Development (0005 - 0 John Adams 🔊 Februari 2		
Profile Documents Client Portal Calendar Deadline Assistant	Time & Expenses	Back to All Matters
MATTER TASKS H	NOTES (6)	
All Open (1) Sort by Due Do	Kevin G September 12, 2022 10:17 am	
Clober 27, 2023	Inspection went well. Edit Delete	3
	Kevin G March # 2022 2:18 pm	

From the Documents Tab:

Please refer to the Download a single document from a matter in Firm Central section (see Page 16).

From Client Portal Tab:

If you have uploaded documents to the Client Portal, please refer to the Exporting Bulk Documents section (Page 18), 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, as the process is the same (see Page 23).

From the Deadline Assistant Tab:

For customers with the Deadline Assistant application, 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.



HOME MATTERS CONTACTS DOCUMENTS CALENDAR TIME & BILLING ACCOUNTING			2 .	Search Firm Central
Real Estate Development (0028 - 0182) John Adams 📧 February 7, 2020 (Open)			2	
Profile Documents Client Portal Calendar Deadline Assistant Time & Expenses				Back to Home
Directory of Events				
			Rules Updates	😌 New Event
Event Name	Rules Authority	Event Date	Last Updated	
Trial of matter.	MN ST RCP Rule 39	December 6, 2023	October 18, 2023 Kevin G	×
U/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	
	MN ST RCP Rule 6.01(e) MN ST RCP Rule 68.01(a)	November 16, 2023	October 18, 2023 Kevin G	
U/D to serve an offer of judgment (by mail).				

From the Time and Expense Tab:

Download Time and Expenses for a 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.

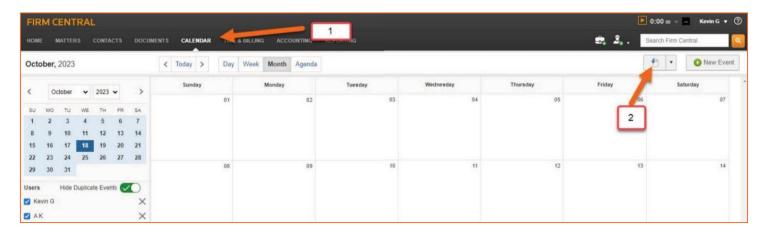
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w me&Expens ate ♥ 3/10/2023	User Kevin G	10/18/202 En Tin	ry Type le le	731/2023 Include Billed Description Research on land documents and legal description.	Ē	Taxable	Cost x Quantity	\$350.00/hr 1.40hr \$350.00/hr	Total \$490.00	Status Billed 1431 Billed	e Entry



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 to select the events within the next year or select the date range.
- Choose one option to export, along with the types of events and files.
 Note: You can also download Calendar Events in bulk, from the "DOCUMENTS" menu.

Note: If you would prefer to download this data in bulk, please go to the Documents tab, and select the Export Documents button in the top right corner. The bottom left radio buttons will give you ar option to Export Calendar Events. 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 730 days) 07/25/2024 and 07/25/2024 Which events do you want to include? All Events What format do you want to receive? Deliver As CSV 	Download		x
Calendar filters will be applied to delivered results. Which dates do you want to include? Events within the next year	the Export Documen	button in the top right corner. The bottom left radio buttons will give you	
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Note: You can export 730 days (two years) 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 is 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. This Guide will go through each tab starting with the

Time Entry Tab:

- 1. Select "TIME & BILLING" from the main menu.

- Select the "Time Entry" Tab.
 Select the User. Please note, you can only select one User at a time.
 Select either "Day" or "Week". You can click into the calendar to go to a previous week.
 Click the Export icon or down arrow to export the data to a .CSV file.
- - Note: You can export 730 days (about 2 years) of data at a time.

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	External Narrative	<u>Si</u> Oc	un Mon t 15 Oct 16	Tue Oct 17	Wed Oct 18	Thu Oct 19	Eri Oct 20	Sat Oct 21	Hours	D	etails	Total	
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~	Reviewed contract documents		1.50						1.50	Activity \$350.00		\$525.00	
	Telephone Call with Client		1.40						1.40	Activity	/ <u>Task</u>	\$490.00	
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		Format CSV											
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	23	23 Go < Today 23 External Narrative > Meeting with client. > Reviewed contract documents > Telephone Call with Client	23 Go < Today > Day Week External Narrative Meeting with client. Reviewed contract documents. Telephone Call with Client File Name* Firm Central FC 7 Select Transaction Transactions betw 01/01/2022 Format CSV Deliver As	23 Go < Today > Day Week External Narrative Sun 5 Mon Oct 15 Mon Oct 15 Mon Oct 16 V Meeting with client. V Reviewed contract documents. V Telephone Call with Client V Telephon	2 3 4 23 Go < Today > Day Week External Narrative Sun Socials Juer 1 > Meeting with client. 2.40 > Reviewed contract documents. 1.50 > Telephone Call with Client 1.40 > Telephone Call with Client 1.40 > File Name* File Name* Firm Central FC Admin1 Time Entry List Select Transactions for statements: Transactions between (limited to 730 days) 01/01/2022 to 12/31/2023 Format CSV Deliver As	23 Go < Today > Day Week External Narrative > Meeting with client. > Meeting with client. > Reviewed contract documents. > Telephone Call with Client > Telephone Call with Client	2 3 4 23 Co Today > Day Week External Narrative Still Oct 10 Oct 10 Oct 10 V Meeting with client 2.40 0 0 V Meeting with client 1.50 0 0 V Reviewed contract documents: 1.50 0 0 V Telephone Call with Client 1.40 0 0	2 3 4 23 Gold Yold Day Week External Narrative Stats Oct 15 Oct 15 Oct 12 Oct 18 Oct 19 Oct 20 Meeting with client. 240 Reviewed contract documents. 150 Telephone Call with Client 140 Flie Name* Flie Name* File Name* Firm Central FC Admin1 Time Entry List Select Transactions for statements: Transactions between (limited to 730 days) 01/01/2022 to 12/31/2023 Format CSV Deliver As	2 3 4 23 Co < Today > Day Week External Narrative Oct 15 Oct 15 Oct 17 Oct 19 Oct 20 Oct 21 > Meeting with client 240 > Reviewed contract documents. > Total with Client 1.0 Export File Name* File Name* Firm Central FC Admin1 Time Entry List Select Transactions for statements: Transactions for statements: Transactions between (limited to 730 days) 01/01/2022 to 12/31/2023 Format CSV Deliver As	2 3 Co < Today > Dey Week External Narrative Meeting with client Meeting with client Meeting with client Meeting with client Reviewed contract documents. 150 Reviewed contract documents. 150 File Name* File Name* File Name* Fire Central FC Admint Time Entry List Select Transactions for statements: Transactions for statements: Transactions between (limited to 730 days) 01/01/2022 to 12/31/2023 Format CSV Deliver As	2 3 4 23 6 Today > Day Week External Narrative San S Day S • Meeting with client. 240 Cat 19 Cat 20 Cat 24 • Meeting with client. 240 Cat 10 Cat 20 Cat 24 • Meeting with client. 150 150 Cat 20 Cat 24 • Meeting with client. 150 150 Cat 20 Cat 24 • Meeting with client. 150 150 Cat 20 Cat 24 • Meeting with client. 140 140 330.00 • File Name* File Name* File Name* File Name* • File Name* It 231/2023 File Name* File Name* • Format CSV CSV Deliver As Deliver As	2 3 4 2 5 5.30 23 C Today Day Week 23 C Today Day Week 240 Day 0.240 Day 0.240 Day 0.240 Meeting with client. 240 Day 0.240 Day 0.240 Week 150 150 Day 0.240 Day 0.240 Week 150 150 Day 0.240 Day 0.240 Week 140 140 Day 0.240 Day 0.240 Week Task 250.00 Day 0.240 Day 0.240 Week Total 0.240 Day 0.240 Day 0.240 Day 0.240 Week Day 0.240 Day 0.240 Day 0.240 Day 0.240 Week Day 0.240 Day 0.240 Day 0.240 Day 0.240 Week Task Task Status 1.200 Day 0.240 Week Total FC Admin 1 time Entry List Status 1.200 Di 10/12/0.22 Di 10/12/0.22 Week Di 10/12/0.22 Total 12/0.230 Di 10/12/0.22 Di 10/12/0.22 Di 10/12/0.22 Deliver As	2 3 4 2 0 100 23 0 100 24 0 0 24 0 0 24 0 0 25 0 0 26 100 0 26 100 0 26 0 0 240 0 0 240 0 0 240 0 0 240 0 0 240 0 0 240 0 0 240 0 0 240 0 0 240 0 0 240 0 0 240 0 0 240 0 0 240 0 0 240 0 0 240 0 0 240 0 0 240 0 0 250 0 0 250

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.

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Firm Central FC Admin1	Expense Entry List	
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01/01/2022 to	12/31/2023	
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Deliver As Single File		
Export Cancel		

Pre-Bills Tab:

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

- Select the "TIME & BILLING" Tab from the main menu.
 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 the down arrow.
- 7. Select "Download".



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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	
O Download List of Pre-Bills	
File Name*	
Firm Central 4 Pre-Bill List	
Format	
PDF	
Deliver As	
Single File	
O 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.

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- 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. The drop-down arrow provides you with options to Print, Export, and Download. The Export option gives the choice of a PDF or ZIP file (it will download as a ZIP file if multiple items are selected) and a download option as a .CSV file. Note: Under "Reporting" you can download reports that will detail invoice time and expense entries.

Trusts & Retainers Tab:

To export data from the Trusts & Retainers Tab:

- 1. Select the "TIME & BILLING" 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. The dropdown arrow provides you with options to Print, Download, and Export. The Download option gives the choice of a PDF or ZIP file (it will download as a ZIP file if multiple accounts are selected) and an Export option as a .CSV file.

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	Jo aph Abi 3	4 ne, Joseph				Client Pre-payment	\$550
	Real istate	Acme Corp	Real Estate	0072		Matter Retainer	\$149,100
	Real Es ate Development - IOLTA	Adams, John	Real Estate Development	0182		Matter IOLTA	\$371
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	Business De elopment - Flat Fee - Trust Ac	Adams, John	Business Development - Flat Fee	0194		Matter Trust Account	\$3,000
	Real Estate Develo	Adams, John	Real Estate Development	0182		Matter Trust Account	\$0
	Power of Attorney	Adams, John	Power of Attorney	123456789		Matter Trust Account	\$1,844
	Sept Real Estate Closing - Adams - Real E	Adams, John	Sept Real Estate Closing - Adams	0240		Matter Real Estate Transa	\$147,250
	Trust Example - Trust Account	Adams, John	Trust Example	0212		Matter Trust Account	\$330
	Business Development - S Adams - IOLTA	Adams, Samuel	Business Development - S Adams	0248		Matter IOLTA	\$10,328

All Accounts Tab:

"All Accounts" supplies an account summary for each Matter. The data can be downloaded in a similar way to 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.
- 6. Once your selections have been made, click on the Export icon or drop down arrow. The drop



down arrow provides you with options to Print, Download, and Export. The Download option gives the choice of a PDF or ZIP file (it will download as a ZIP file if multiple accounts are selected) and an Export option as a .CSV file.

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	Adams, John	Power of Attorney	123456789		\$0.00	<u>\$1,844.0</u>
	Adams, John	Real Estate Development	0182		\$0.00	\$371.1
	Adams, John	Trust Example	0212		\$0.00	\$330.0
	Adams, John	Business Development - Flat Fee	0194		\$0.00	\$3.000.0
	Adams, Samuel	Business Development - S Adams	0248		<u>\$0.00</u>	\$10,328.0
-						

Reporting

From the "Reporting" Tab you can run a series of reports to export data. We recommend you run several, if not all, of 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.
- On the far right of the page, you can select "Run" to run the desired report.

Note: Reports will no longer be functional after September 30, 2024. Any firm which desires to download reports must do so before that date.



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eports		(7) Hov 6 my reg
Search Reports		
Report	Description	Category
Sales Tax Liability	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
Account Transactions	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
Profit & Loss	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
Trial Balance	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
Balance Sheet	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
Vendor Summary	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
Time by User	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
Time by Client	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
Time by Matter	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
Collection Realization by User	View the details of billed, written off, and collected fees with realization rates broken down by involces 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 to adplie in the payment is applied to the invoice is taxes, expenses, fees, and finance charges respectively. For a partial write of 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
Write Offs	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 the invoice respirate of the respirate date range. This report does us those amount due that made the invoices or exceeded and a respirate the formation of the invoice respirate or discrete and the invoice respirate and the invoice respirate and the invoice respirate and the invoice respirate and the invoice amount due to the invoice respirate and the invoice amount due to the invoice respirate and the invoice amount due to the invoice respirate and the invoice amount due to the invoice respirate and the invoice amount due to the invoice a	

After selecting your report, the report page will load. If the report allows for a date range, it 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.
- 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.



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Accounting

For customers with the Accounting Module, follow these steps to export and download your data.

Accounts Receivable Tab:

The "Accounts Receivable" Tab is identical to the "Payment & Invoices" Tab within "Time & Billing"

- 1. Select "ACCOUNTING" from the main menu.
- 2. Select the "Accounts Receivable" Tab. (See page 27 and follow the same steps in the Payment & Invoices section to download Accounts Receivable).

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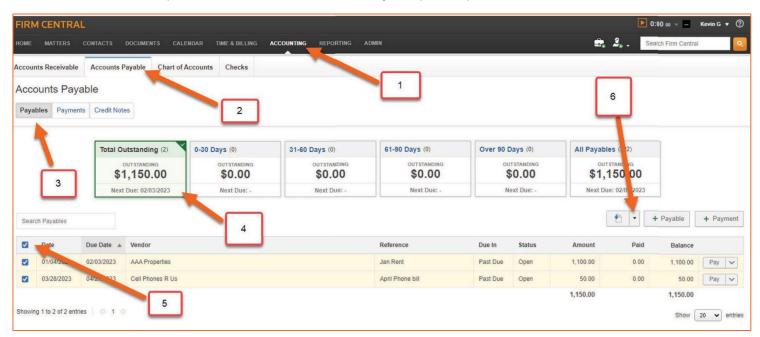
Accounts Payable Tab:

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.



After 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 left 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 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.

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	04/26/2023	-	Check	AAA Properties	Jan Rent		(1,100.00)	View 🗸
	03/28/2023	KG	3	Office Supply Company	office supplies		115.00	View 💊
	03/28/2023	KG	Credit Card	Burger Joint	lunch meeting		36.12	View 🗸
	03/28/2023	KG	Check	Office Supply Company	office supplies		(115.00)	View 🗸
	03/28/2023	KG	Check	Office Supply Company	office supplies		115.00	View 🗸
	03/10/2023	KG	Payment	Hennepin County Clerk	filing		25.00	View 💊
	03/10/2023	KG	Check	Discount Office Supplies	Copy paper		21.00	View 🗸
	02/16/2023	KG	Check	Pizza Hut	Lunch Meeting		36.12	View 🗸
	02/16/2023	KG	Payment	Dakota County Clerk	filing fee		33.08	View 🗸

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.

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Date 🔻	User	Vendor 2	Reference	Status	Amount	Used	Balance	
10/28/2021	KG	American Express	client exp	Closed	119.00	119.00	0.00	View
10/28/2021	KG	Bank of America VISA	ccrd bill	Closed	429.00	429.00	0.00	View
03/02/2020	RH	Banana Republic	More uniforms	Closed	300.00	300.00	0.00	View
11/21/2018	KG	In And Out Burger	Company Lunch	Closed	75.00	75.00	0.00	View
Showing 1 to 4 of	of 4 entries	010					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.

OME		ONTACTS DOCUMEN		ALENDAR TIME & BILLING A	COUNTING REPORTING ADM	IN			- 💼 2	Search Firm Central	
	nts Receivable	Accounts Payable	Chart	of Accounts Checks			2				
	A	set (17)		Liability (5)	Equity (3)	Income (8)	Expense (24)		All (57)	Y	
		\$5,388,401.1	8	\$2,884,671.83	(\$752,841.28)	\$3,338,209.46	\$81,638.83		\$10,	940,080.02	
Sear	ch Chart of Account		Inactive						÷	+ Account +	Transactio
☑,	Account Numbe		Accour	it Name				Туре	S1 .415	Balance	
	10000		Operati	ng Account - Checking				Asset	Active	3.422.467.28	Edit
•	10011		3	Mastercard				Ast	Active	(5.935.17)	Edit
	10012			edit Card - Opening Balance			4	Asset	Active	5.400.00	Edit
	10100		Trust A	ccount				Asset	Active	515.436.78	Edit
	10101		Investm	ent Account				Asset	Active	15.000.00	Edit
	10200		Credit C	Card				Asset	Active	<u>A 1.919.88</u>	Edit
	10300		Escrow	IOLTA				Asset	Active	<u>1.043.316.86</u>	Edit
	10400		IOLTA 2	B				Asset	Active	2.021.00	Edit

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.

ME	MATTERS	CONTACTS D	DOCUMENTS CALENDAR TIM	E & BILLING ACCOUNTING REPORTING ADMIN	G	2.	Search Firm Central	
2010		count - Check \$3,882,172.87	Last Reconciled Date: - 3				\$3,422,4	ding Baland 467.2
learc	ch Transactions	D	ate Range 📑 09/01/2021 to 📑	10/19/2023		- Sigir	+	- Transa
2	Date 🔻	Туре	Ref Number	Description	Debits	Credits	Balance	
	10/1- 2022	AP Payment	filing fee	Dakota County Clerk - filing fee		\$27 10	\$3,346,035.84	View
2	10/12/2022	eposit	interest for Sept	interest for Sept	\$6.02		\$3,346,060.84	View
/	10/12/2022	Invoice Pa	2	Ben Franklin - 0036 - CK#11123	\$1,220.	3	\$3,346,054.82	View
1	09/26/2022	Invoice Pay	1402	John Adams - 0182 - CK#11123	\$1,490.00		\$3,344,834.82	View
2	09/20/2022	AP Payment	Photocopy Paper	Discount Office Supplies - Office Supplies		\$25.00	\$3,343,344.82	View
2	09/19/2022	Deposit	interest for August	August Interest	\$6.02		\$3,343,369.82	View
2	09/19/2022	AP Payment	Sept Rent	AAA - Sept Rent		\$1,100.00	\$3,343,363.80	View
2	09/19/2022	Invoice Pay	1393	Ben Franklin - 0036 - CK#1111	\$100.00		\$3,344,463.80	View
2	09/19/2022	Invoice Pay	1400	Acme Corp - 0072 - Reversal: 09/19/2022, KG, Check, CK#11	(\$100.00)		\$3,344,363.80	View
1	09/19/2022	Invoice Pay	1400	Acme Corp - 0072 - CK#11	\$100.00		\$3,344,463.80	View



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.

OME	MATTERS	CONTACT	S DOCUMENTS	CALENDAR TIME & BILLING ACCOUNTING I	REPORTING ADMIN			💼 2	Search Firm Central	
cour	its Receivable	Accou	nts Payable	Chart of Accounts Checks				_		
he	cks				1			5	-	
Searc	ch Checks		Filter by: Al	I Bank Accounts	ad3			_	Order Checks	CP F
~	Date 🔺	User	Account #	Туре	Payee	Reference	Check #	Status	Amount	
/	03/14. 918	JG	10000	Payable	E-File Service	Fees	123	Printed	12.00	Print
2	09/14/2018		10000	Payable	E-File Service	124	124	Printed	50.00	Print
-	09/21/2018	KG	10000	Payable 2	Copy Center	1245	1245	Printed	40.00	Print
	09/24/2018	JG	4	Payable	Office Equipment Supply	1234	1234	Printed	575.00	Print
2	09/25/2018	JG	10000	Payable	Office Equipment Supply	100	100	Printed	300.00	Print
2	09/25/2018	JG	10000	Firm Expense	Copy Center	1254	1254	Printed	50.00	Print
2	09/28/2018	AKR	10000	Payable	E-File Service	1234	1234	Printed	300.00	Print
2	10/23/2018		10000	Payable	Hennepin County Clerk	124	124	Printed	175.00	Print
	10/29/2018		10000	Payable	Hennepin County Clerk	12345	1234	Printed	510.00	Print
~										

Exporting data from a lapsed Firm Central subscription

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 section. 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 Menu.
- 2. Tasks
- 3. Notifications



FIRM CENTRAL A Your subscription to Firm (Central has lapsed. You may export your content. Please contact your sales represente	alive to renew your subscription.
HOME MATTERS CONTACTS DOCUMENTS CALENDAR TIME & BI	ILLING ACCOUNTING REPORTING	😌 🤰 Search Firm Central
• (WEDNESDAY, JUL 31, 2024 > • + • ALL DAY • • • + • 6 ADM •	TASKS	No new notifications today.
1 PM 2 PM 3 PM 4 PM 5 PM REUTERS NEWS		WHAT'S NEW For maintenance reasons, Firm Central will be inaccessible on Saturday, August 10, 2024, from approximately 9:00pm to 1:00am Central Time on Sunday, August 11, 2024.
Ex-BBC news presentor Huw Edwards pleads guilty to indecent child pictures charges LONDON (Reutes). Former fibrin TV presenter Huw Edwards, the long- time face of the BBC's flagship news programme, pleaded guilty on Wednesday to three counts of making indecent pictures of children Edwards was the BBC's highest paid		MY RECENT ACTIVITY All Activity (25) Inv 10723 - Matter 2153 - 03202020 pdf /Matter 032120031458/Time & Billing Invoices/ 032020191218, Client Matter 032120031456 but 10733 - Matter 3153 - 03303030 evt didutor

Matters

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

- 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, email or download 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. If you choose to download, it will allow you to download as a Microsoft Word file, CSV, PDF, Word Processor (RTF), or WordPerfect file.

FIRM CENTRAL	Your subscription to Firm Central has lapsed. Your			ADCDevotFirst AtLast V
IOME MATTERS CONTACTS DO	DOUMENTS CALENDAR TIME & BILLING ACCOUNT	ING REPORTING		Search Firm Central
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lear filters	Select all No items selected			Select Export ption: •
DPEN/CLOSED	AdcSimpleMatter0826_9497 This is Description	5225	002, client002	OPEN August 1, 2022
Open (2588)	Oct Release test This is test	1234	002, client002	OPEN 2 October 17, 2022
Select Users	goodDay	0365	002, client002	OPEN June 4, 2019
RACTICE AREA Admiralty and Maritime Law (2) ADR/Mediation (2)	C Flat1	0477	002, client002	OPEN October 4, 2019
 Banking and Commercial Finance (1) Bankruptcy (3) 	D MobileQA	0407	002, client002	OPEN July 30, 2019
Business Transactions (1) Show more	OpenQA	0405	002, client002	OPEN July 30, 2019
	Demo2	0463	002, client002	OPEN September 4, 2019
	Demo Assistant	5187	002, client002	OPEN April 18, 2022
				0051



Email Request	x	Download	x
To *	190 Matter(s) Format	1 Matter(s) File Name*	
Separate email addresses with a comma or semicolon Subject *	Microsoft Word CSV	Firm Central Matter List - 1 Matter(s)	
Firm Central Matter List - 190 Matter(s) Message 500 characters remaining	PDF Single File	Format CSV Microsoft Word CSV PDF Word Processor (RTF) Word Perfect	
Send Cancel		Download Cancel	

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.
- 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 popup window will appear with a drop down offering the option to email the list as a PDF, CSV, or
 Word document.

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All Contacts Clients Client Group	1 - 20 of 221 ⊙ 1 2 3 4 5 O Bort by: Name - According ∨ 🖉 _O Now Contact + 📴 🔯 🐑 +
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Person (177) Business (44) ROLE	Writt, Chase 1 Role: Client 1 19522145144 610 Opperman Drive, Eapan, Minnesola 55121 Iso
Accountant (4) Attorney (1) Client (181)	A O AAABusiness Role: Client
Court Clerk or Personnel (1) Expert (2) Judge (1)	AAA Properties Role: Client, Vendor
Vendor (12)	Aubott, Mike Role: Client Aubott, Mike Role: Client

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. To download bulk documents, select the "Extract Documents" icon on the top left. Refer to the "Download Bulk Documents" section to download data in bulk.



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Search Documents	All Documents	Extract Documents:
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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.

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October 19, 2023		Notes (0)
Mr Client		2
123 Main Street Anytown, MN 54321		Only I can view this note.
RE: Legal Matter,		Garden Carron

Calendar

You will be able to export your calendar events along with your 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.



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lanu	ary,	2024					< Today :	Day	Week	Month	Agenda					1 New Event
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sers		Hide D	uplica	te Even	ts	X										
Kev Ad						×										

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. Note: you can export 730 days (2 years) of data 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.

Download		_
Choose options below	for delivering ev	ents.
Calendar filters will be	applied to delive	red results.
Which dates do you	next year	
Dates between (li 01/01/2022	mited to 730 day and 12/31/2	
Which events do you All Events What format do you Deliver As		
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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 editing a Pre-Bill.

Time Entry and Expense Entry

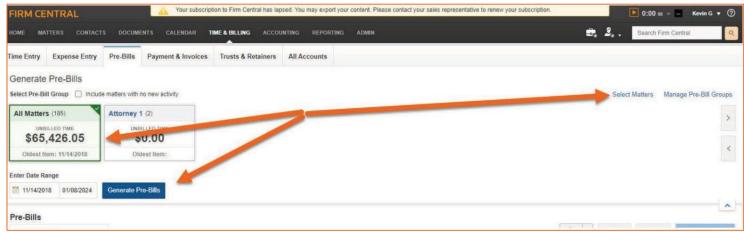
The "Time Entry" and "Expense Entry" Tabs may appear to have active menu options, but these pages are not functional. You can, however, enter time and expense in the Pre-Bill Summary, which we will cover next.



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Time Entry	Expense Entry P	re-Bills Payn	nent & Invo .es	Trusts & Retainers	All Accounts	s												
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Pre-Bills

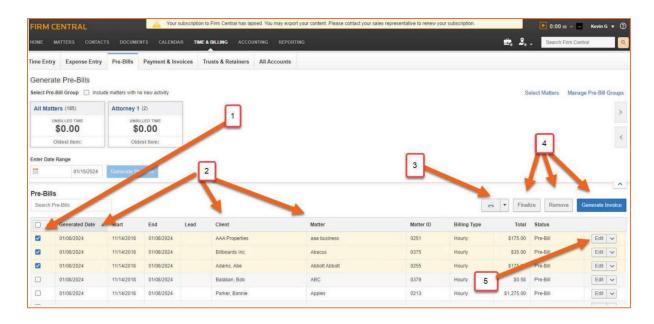
You will have full functionality to generate Pre-Bills whether in a batch or individual selected Matters.



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.





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.

Note: Even though we are not showing the "Expense Entry" page or the "Pre-Bill" Summary page, these pages are fully functional.

		CONTACTS DOCUMENTS CALENDAR TIME & B rida vs Dwayne Johnson (0085 - 0101) Fee Arrar Billable Date Range: 11/14/2018 to 01/08/2024		ADMIN		4	÷. 2	Search Firm Ce	Invoice Total 1.926.67
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כ כ כ	Thu Jun 16 Ed	Pettersen, Bill	Enter message to caent training with Shane glad it's summer	CONSUL / 1855 \$100.00 E Activity / Task	Time 0.02	S1.67 Ren \$105.00 Ren	Adjust	0.02	Tot \$1.0 \$105.0 \$1,820.0

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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Vectors Cancel voices 24 earch Invoices 24 0108/2024 0108/2024 01010/2023 05/30/2023	Date range of a local data data data data data data data da	Io Client Arnold, Tom mentorp, Bob ott, Avy	Filter 2 selections Matter Trust Administration Applecarts Real Estate Millions	Matter ID 0205 0411 0359		\$25.00 \$0.58 \$5,000.00	Paid \$0.00 \$0.25 \$0.00	Due \$25.00 \$0.33 \$5,000.00	ply Paymo Status Unpaid

All functions are available on the alternate Invoice page including:

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

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		1) Fee Arrangement: Hou Range: 11/14/2018 to 01/0			2	4 Amount Due \$0.33
Invoice #430 Invoice Amount \$0.58 Transactions	i.					Void Invoice + Payment + Adjustment Save
Date 🔻	User	Payment Type	Payor/Payee	Description		Amount
01/08/2024	KG	Check		CK# 11123		\$0.25 Edit 🗸
Showing 1 to 1 of 1 ent		1 0		1/3 - 10	∞ + I I Ø	3 ± + :
			Line Town bi		FIRM CENTRAL PREMIER ACCOUNT Water 245 New York, NY 11000 Office: (63)2 234-567 www.lawfmaroch.com	



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).

Trust & Retainers

- 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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ime Er Frust:	ntry Expense Entry Pre-Bills Pays	ment & Invoices Trusts & Retainers A	Il Accounts		-	1	Balan 953,992.8
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0	Springboards - Retainer	Aabott, Mike	Springboards	0347		Matter Retainer	\$25,000.0
0	Abacus - Pre-payment					Client Pre-payment	\$25.0
	Vaudeville - Retainer	Abbott Costello 4	Vaudeville	0261		Matter Retainer	\$2,500.0
0	Shelly - Trust Account	Acme Phone	Shelly	0111		Matter Trust Account	\$5,000.0
	Acme Waxworks - Trust Account	Acme Waxworks				Client Trust Account	\$35.0
	Aquariums - Retainer	Acme Waxworks	Aquariums	0105		Matter Retainer	\$3,000.0
	Abbott Abbott - Retainer	Adams, Abe	Abbott Abbott	0255		Matter Retainer	\$2,590.0
	Fabulous - Trust Account	Adams, Rachel	Fabulous	0099		Matter Trust Account	\$5,500.0
	State of Florida vs Dwayne Johnson - Retai	Aguirre, Grisell	State of Florida vs Dwayne Johnson	0101		Matter Retainer	\$3,073.3
1	Powerball Winner of 360 Million - Trust Acc.	Amos Dawn	Powerball Winner of 360 Million	30-2514		Matter Trust Account	\$2 680 0

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.

	PRINGBOA		ETAINER Matter R	etainer Date Opened	Nov. 30, 2022 Open	6		1	-		Balance ,000.00
Sear	ch Transactions			Go			2		14 B	• + Trans	action
	Date 👻	User	Туре	Invoice #	Payment Type	Payor/Payee	Description	Debits	Credits	Balance	
1	11/30/2022	WJP	Deposit		Check		Opening Balance from client		\$25,000.00	\$25,000.00	Edit 🗸
	-		_					\$0.00	\$25,000.0	\$25,000.00	

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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	e (0233 - 0 Ilo Date Ope	261) ned: Jul 21, 2022		-			Balance \$199.00
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ate 🔹	User	Туре	Invoice	Description	Charges	Credits	Balanc
/20/2022	K	Invoice	281	anvoice 2			\$199.0
/21/2022		Invoice	211	Invoice			\$199.0
21/2022		ovoice	210	Invoice			\$199.0
/21/2022	WJP	Pays of	209			\$37.00	\$199.
21/2022	WJP	Payment 3	209			\$64.00	\$236.
21/2022	WJP	Matter Ret	209	Auto Deducted from Vaudeville - Retainer		\$500.00	\$300
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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.



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	08/10/2023	422		Abbott, Al	rγ		Real Estate	Millions	0359	0	\$5,000.00	\$0.00	\$5,000.00	OVERDUE
	05/30/2023	420		Ammento	р, Вор		Applecarts		0411		\$70.00	\$25.00	\$45.00	OVERDUE
0	05/01/2023	413		Aandersn	n .leff		Plumbing		0401		\$200.00	so oo	\$200.00	OVERDUE

Reporting

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

Note: Reports will no longer be functional after September 30, 2024. Any firm which desires to download reports must do so before that date.



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Report	Description	Category	Ŧ
Time by User	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
Time by Client	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
Time by Matter	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
Collection Realization by User	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 in which the invoice is unitien off is finance charges, expectively, For a partial write off or invoice is written off is finance charges, expectively, For a partial write off is report does not show payments or adjustments made to finance charges respectively. For a partial write off is finance charges respectively. For a partial write off is finance charges respectively. For a partial write off is finance charges respectively. For a partial write off is finance charges respectively. For a partial write off is finance charges respectively. For a partial write off is finance charges respectively. For a partial write off is finance charges respectively. For a partial write off is finance charges respectively. For a partial write off is finance charges respectively. For a partial write off is finance charges respectively. For a partial write off is finance charges respectively. For a partial write off is finance charges respectively. For a partial write off is finance charges respectively. For a partial write off is finance charges respectively. For a partial write off is finance charges respectively. For a partial write off is finance charges respectively. For a partial write off is finance charges respectively. For a partial write off is the partial write off is finance charges respectively. For a partial write off is finance charges respectively. For a partial write off is finance charges respectively. For a partial write off is finance charges respectivel	Time and Billing	Run
Vrite Offs	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
Collection Realization by Matter or Client	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	Run

Administrative Menu

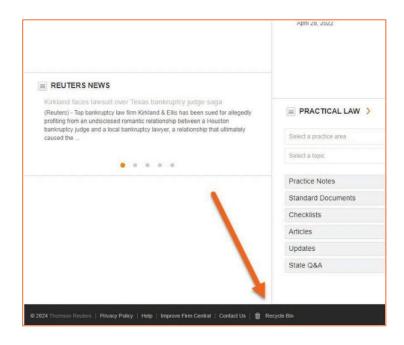
There should not be a need to make global edits in the Administrative Menu. However, if you do, there is some limited ability to do so. The functional options in the Administrative Menu include Accounting, Conflict Checking, Firm User Management, Import Firm Data, Customization, Settings & Storage, Product Integration, Deadline Assistant (if you have this in your subscription), and Time & Billing, including all the sub-tabs.

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HOME MATTERS CONTACTS DOCU	MENTS CALENDAR	TIME & BILLING ACC	COUNTING REPORTING			÷	2. s	earch Firm Central	٩
Administration									
Accounting	General Information	Chart of Accounts	Financial Institutions	Auto-Posting	Accountant Access				
Conflict Checking									
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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.

- 1. Select Empty Recycle Bin to delete all the items or select the individual item to delete.
- 2. You can Restore the deleted items by selecting the Restore button.

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Change the download location in browser.

Please ensure that your download location has adequate space to store your data.

Change the download path in Microsoft Edge.

Navigate to browser settings from Microsoft Edge.

- 1. Select Downloads from the list. After selection, you will be able to see the "location" in the Downloads section.
- 2. Click on 'Change' and then choose your designated location to save the files.

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٩	Search settings	Downloads
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ii È	Start, home, and new tabs Share, copy and paste	Open Office files in the browser If this setting is on, Office files (presentations, spreadsheets, documents) will open automatically in Microsoft Edge instead of downloading to your device
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Change the download path in Chrome.

Navigate to browser settings from Chrome.

- 1. Select downloads from the list. After selection, you will be able to see the "location" in the Downloads section.
- 2. Click on 'Change' and then choose your designated location to save the files.

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