

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.

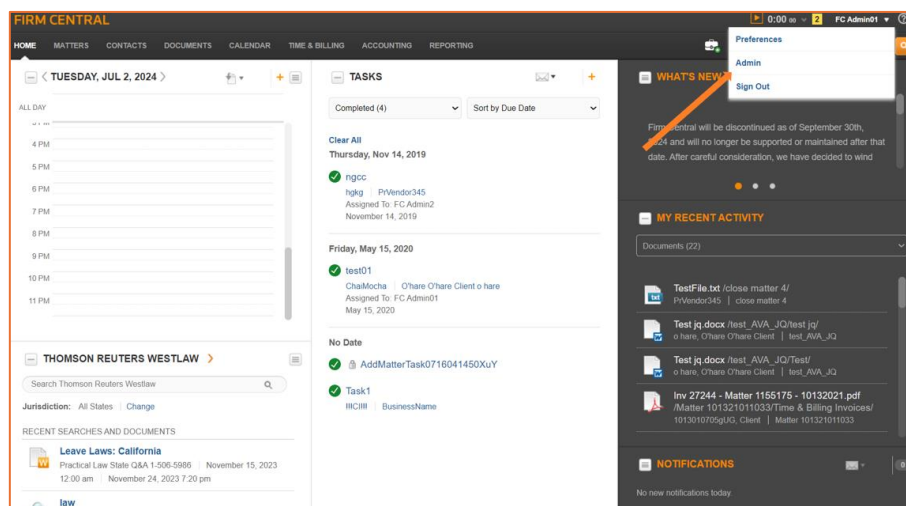
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Steps to assign an Admin to All Matters.

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.

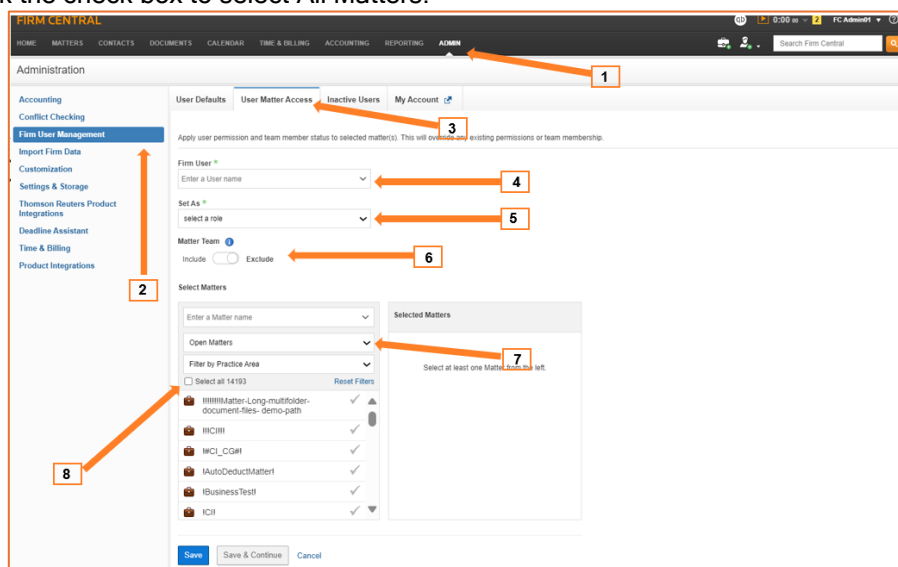
1. Enter your OnePass username and password to gain access to Firm Central.
2. Once you have provided the credentials, you will land on the Firm Central Home page.
3. Select the profile menu in the upper right corner.
4. Select "Admin" from the drop-down menu.
5. Upon selection of Admin, you will be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



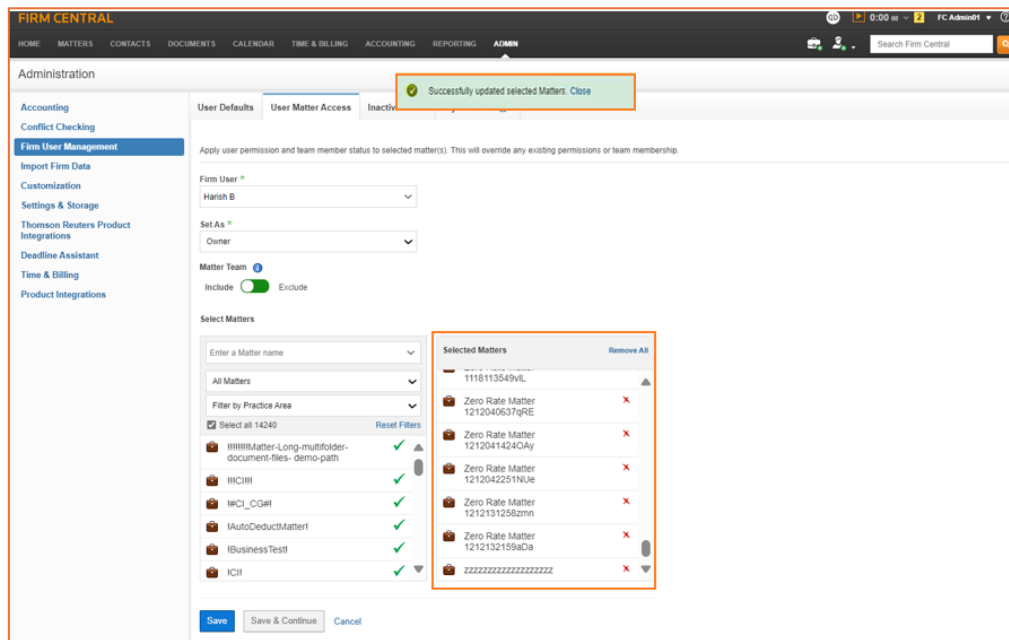
Steps to Assign Admin

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.



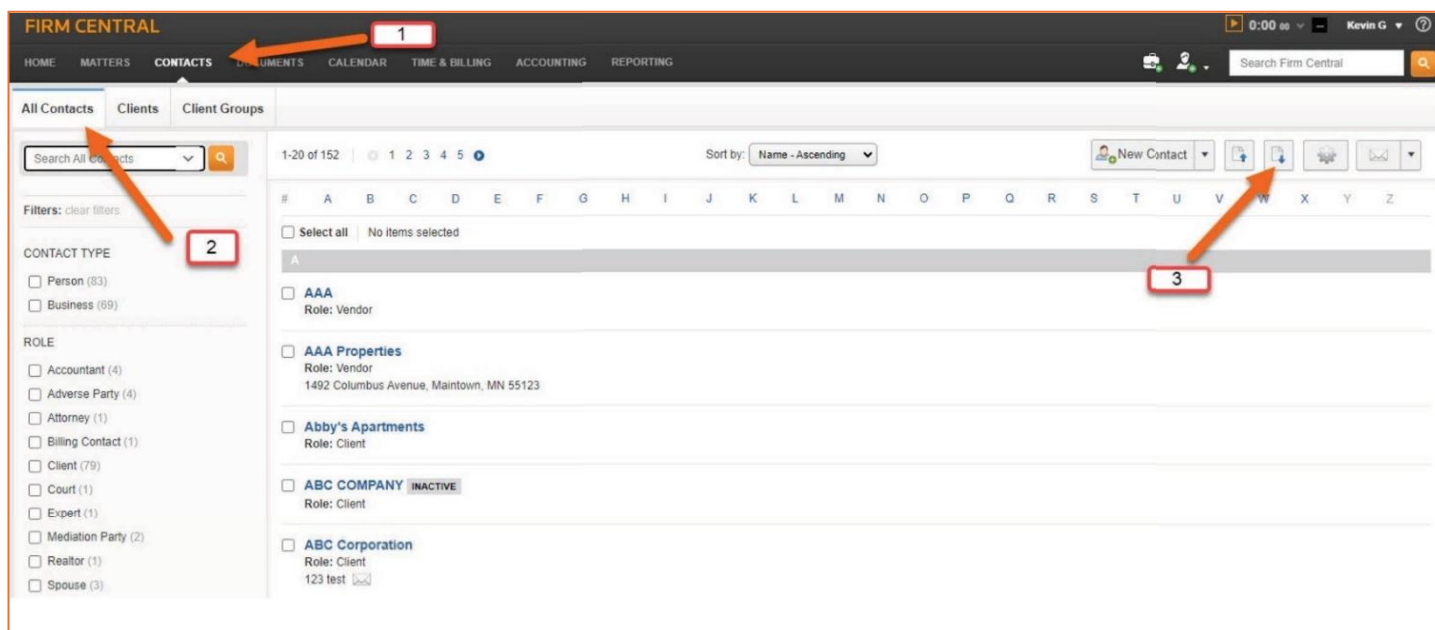
9. You can see all Matters moved to “Selected Matters” section
10. Then click on the Save button to assign all selected Matters to the user. This may take some time depending on how many Matters you have selected.
11. You will see a successful message once all the Matters have been assigned to the Admin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



Exporting Clients and Contacts

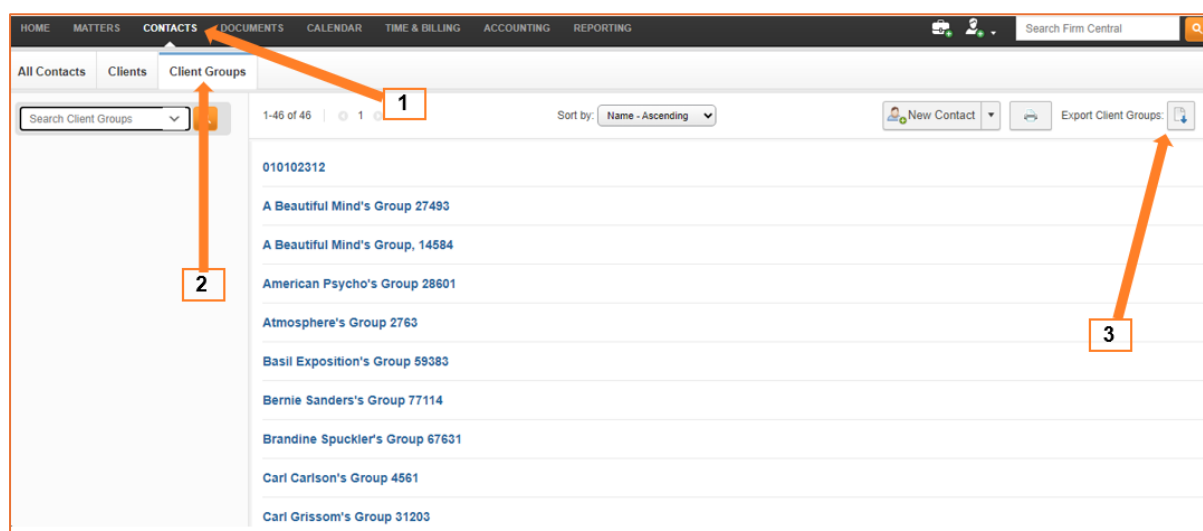
To export the client and contact list:

1. Select “CONTACTS” from the main menu.
2. 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:

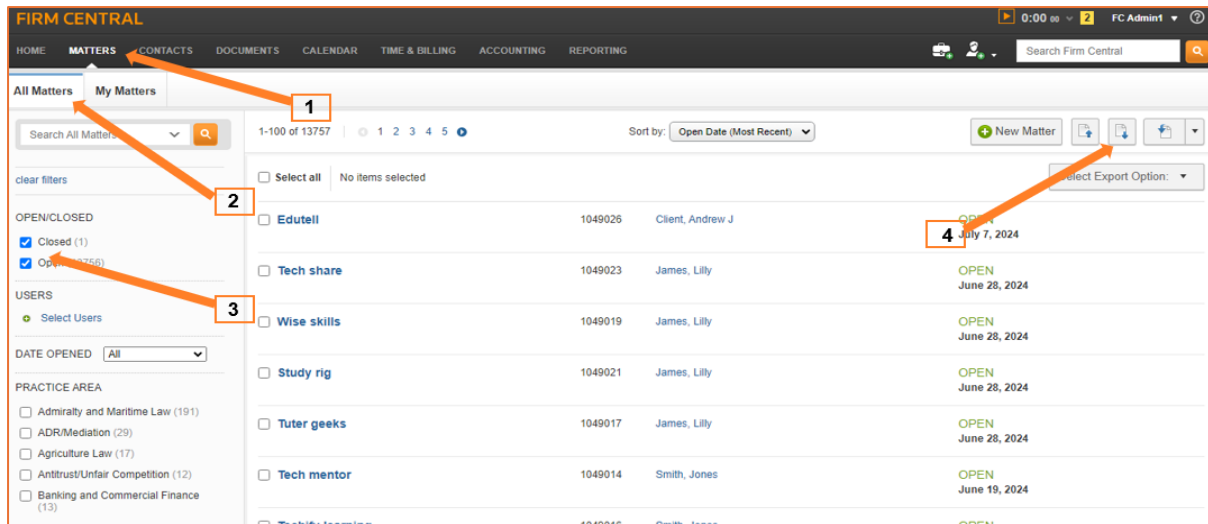
1. Select "CONTACTS" from the main menu.
2. Then select the Client Groups tab.
3. Click on Export Client Groups icon. This will begin to export all the Client Groups in a .CSV file.



Exporting Matters

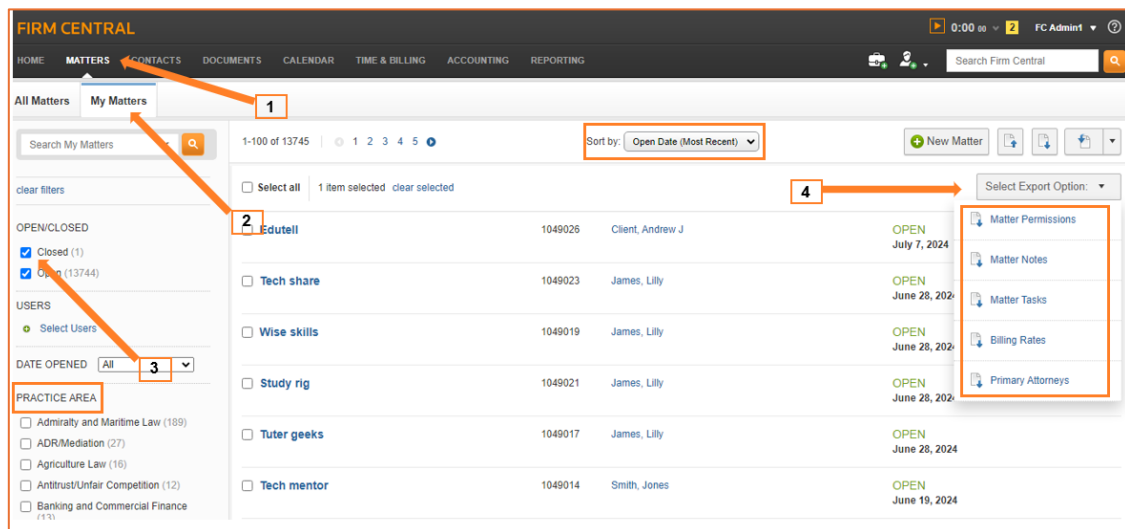
To export Matters list:

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.



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

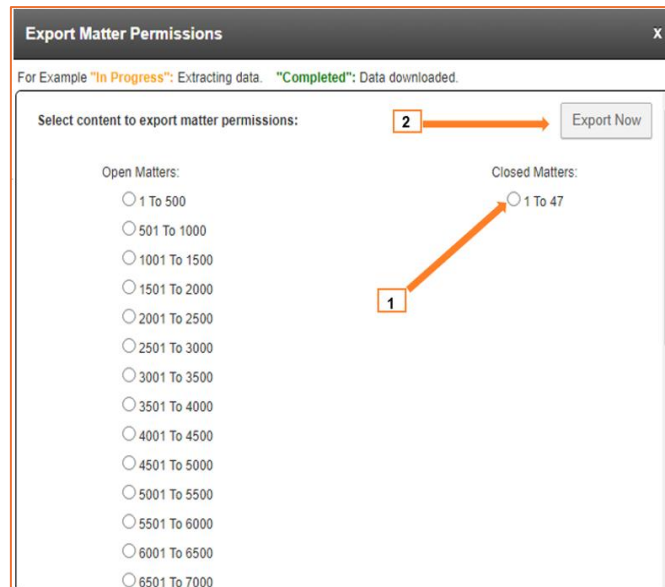
1. Select "MATTERS" from the main menu.
2. Then select All Matters or My Matters.
3. Make sure both Open matters and Closed matters are selected.
4. Click on Select Export Option.
5. Drop down menu contains Matter Permissions, Matter Notes, Matter Tasks, Billing Rates, Primary Attorneys.
6. You can filter 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).



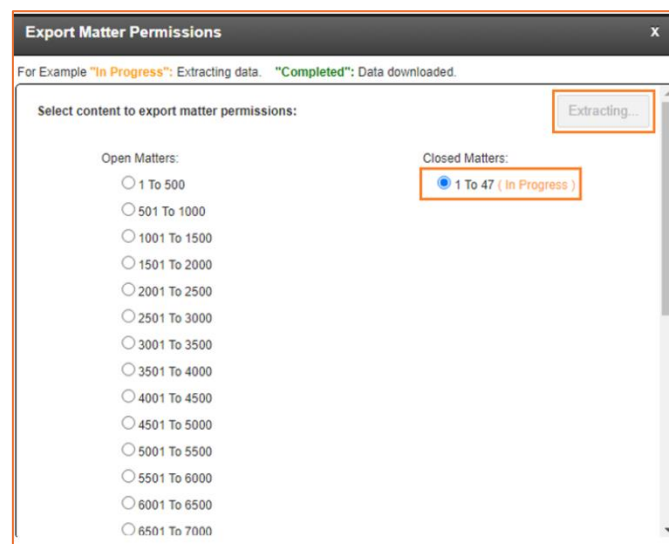
From Export Matter Permissions:

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

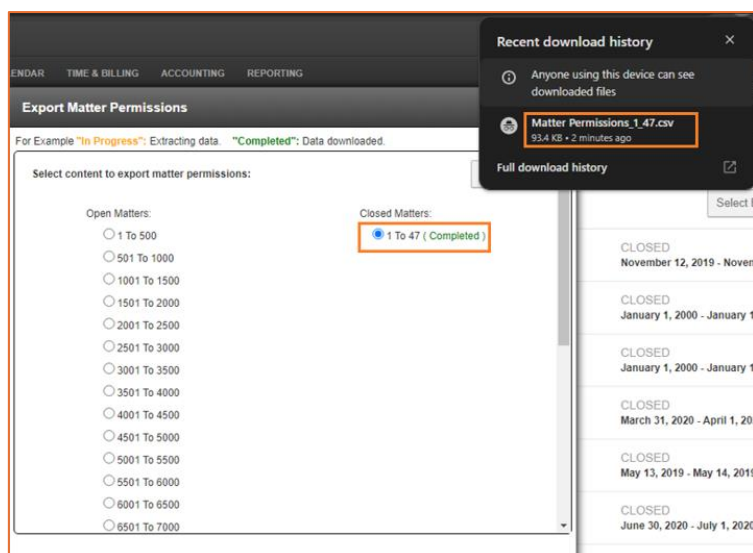
1. Click on any radio button to Export Open or Closed Matters as shown below.
2. Click on "Export Now".



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



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,
- Matter Number.
 - Matter Name.
 - Participants Name.
 - Status of Matter.
 - User Role of Matter Permissions.

A	B	C	D	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.

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

Export Matter Notes

Note: Showing only open and closed matters which have matter notes. 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 an option to Export Matter Notes.

For Example "In Progress": Extracting data. "Completed": Data downloaded.

Select content to export matter notes:

Open Matters:
☐ 1 To 366

Closed Matters:
☒ 1 To 12

Export Now

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

Export Matter Notes

Note: Showing only open and closed matters which have matter notes. 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 an option to Export Matter Notes.

For Example "In Progress": Extracting data. "Completed": Data downloaded.

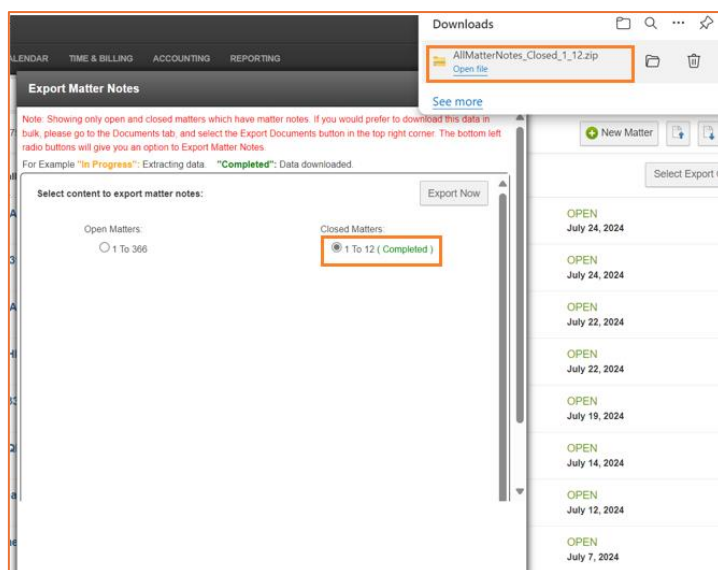
Select content to export matter notes:

Open Matters:
☐ 1 To 366

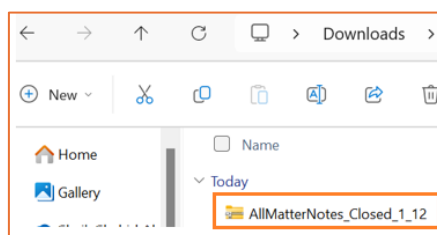
Closed Matters:
☒ 1 To 12 (In Progress)

Extracting...

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.



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.



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
- Count Number.
 - Client Id.
 - Matter Number.
 - Matter Name.
 - Matter Notes.
 - Created By.
 - Created Date and Time.

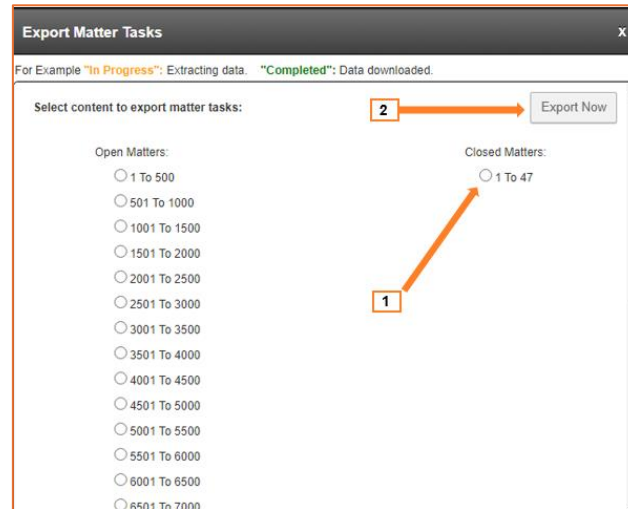
Note: You can also download Matter Notes in bulk, from “DOCUMENTS” menu. (see page 18)

A	B	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

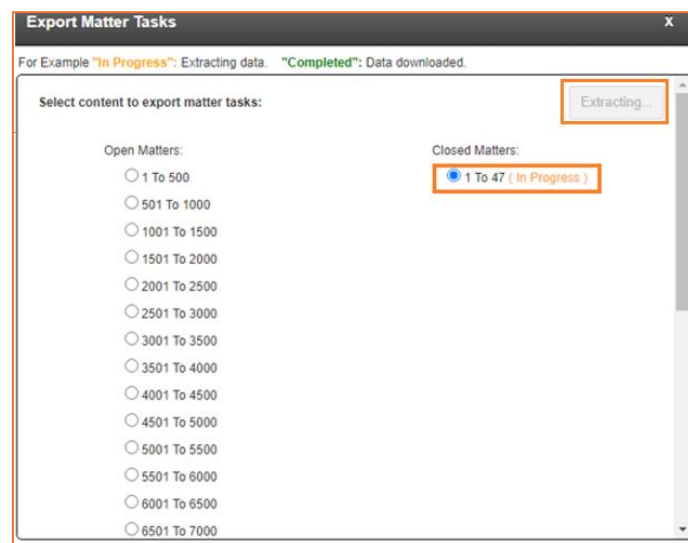
From Export Matter Tasks:

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

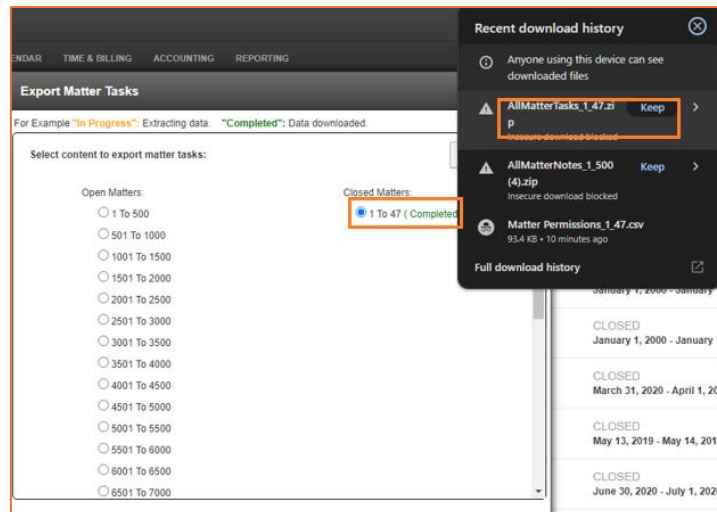
1. Click on any radio button to Export Open or Closed Matters.
2. Click on Export Now



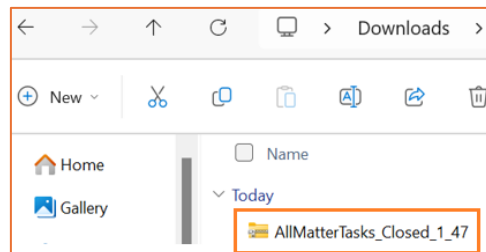
3. You can also see that the status of the matter will show “In Progress,” indicating that the selected matters are being Extracted.



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 Tasks_Open_1_500” file for Open Matters and, “Matter Tasks_Closed_1_47” for Close Matters, with the count of files downloaded.



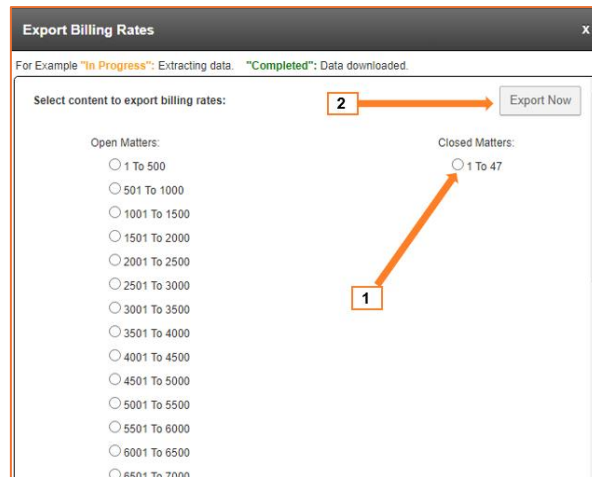
6. You will need to use a decompression utility to unzip these files.
 7. The .zip file contains the files of Matter Tasks in a .CSV file,
 8. The .CSV file contains:
- Count Number.
 - Matter Number.
 - Title.
 - Matter Name
 - Assigned Date.
 - Client Name.
 - Create By Name.
 - Description of Task.

A	B	C	D	E	F	G	H
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

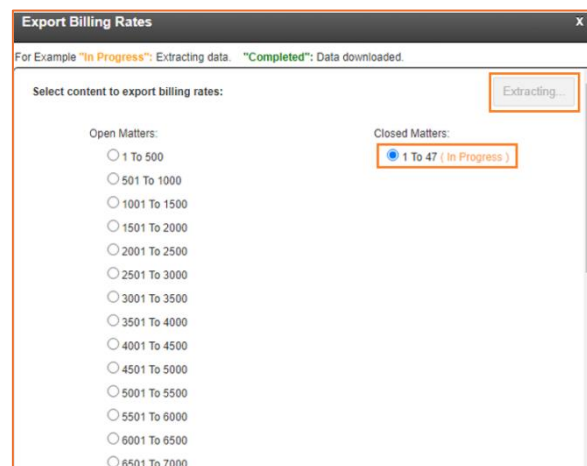
From Export Billing Rates:

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

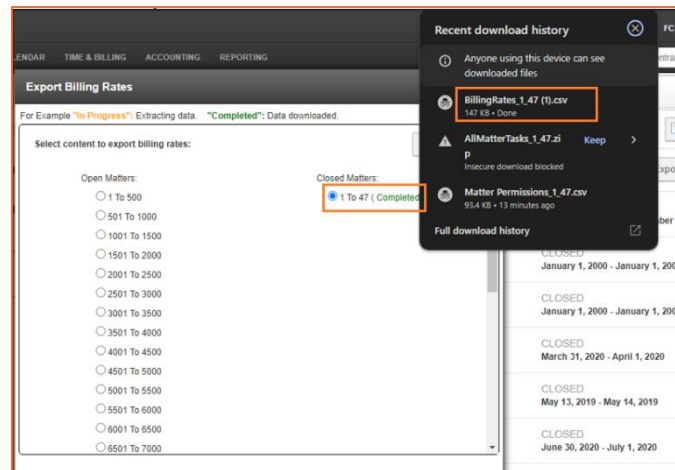
- Click on any radio button to Export Open or Closed Matters.
- Click on Export Now.



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



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:
- Matter Number.
 - Matter Name.
 - Matter Status (Open or Closed).
 - User Id.
 - Colleague.
 - User Role of Matter Permissions.
 - Matter Rate Value.
 - User Rate Value.
 - Client Rate Value.

A	B	C	D	E	F	G	H	I
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.

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

Export Primary Attorneys

For Example "In Progress": Extracting data. "Completed": Data downloaded.

Select content to export primary attorneys:

Open Matters:

- ☐ 1 To 500
- ☐ 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

Closed Matters:

- ☐ 1 To 10

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.

Export Primary Attorneys

For Example "In Progress": Extracting data. "Completed": Data downloaded.

Select content to export primary attorneys:

Open Matters:

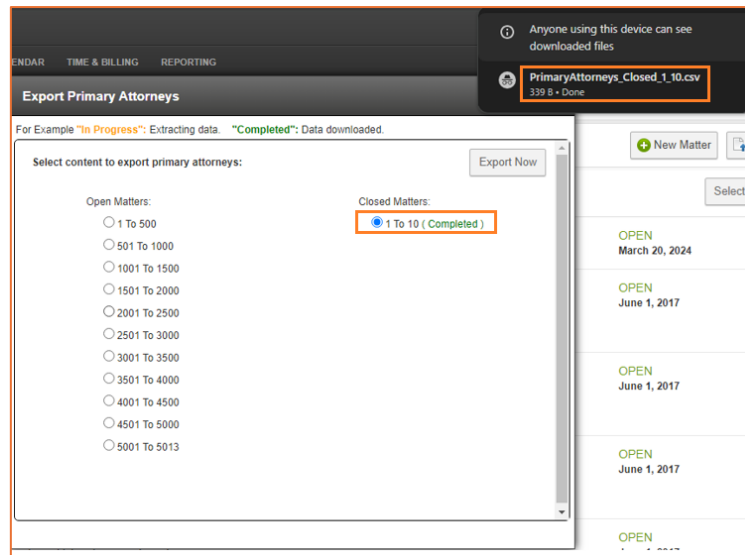
- ☐ 1 To 500
- ☐ 501 To 1000
- ☐ 1001 To 1500
- ☐ 1501 To 2000
- ☐ 2001 To 2500
- ☐ 2501 To 3000
- ☐ 3001 To 3500
- ☐ 3501 To 4000
- ☐ 4001 To 4500
- ☐ 4501 To 5000
- ☐ 5001 To 5013

Closed Matters:

- ☒ 1 To 10 (In Progress)

Extracting...

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 "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.



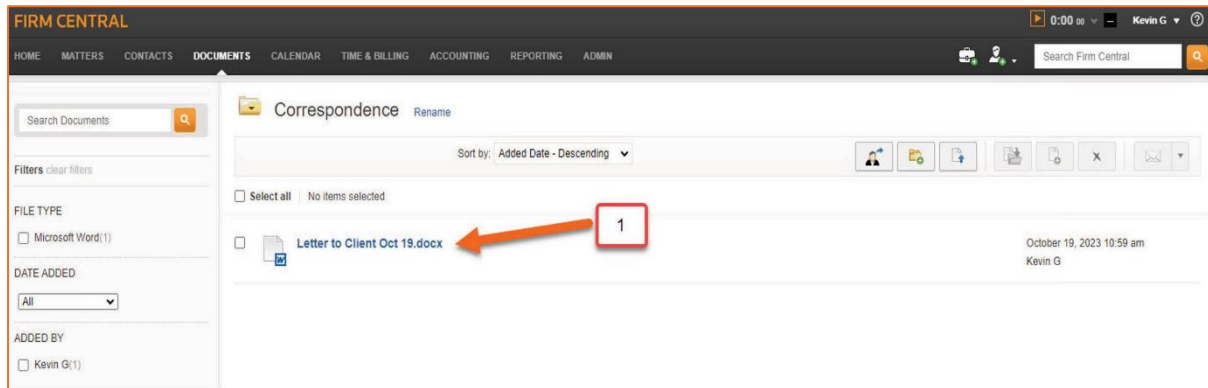
6. The .CSV file contains,
- Matter Number.
 - Matter Name.
 - Originating Attorney.
 - Lead Attorney.

A	B	C	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

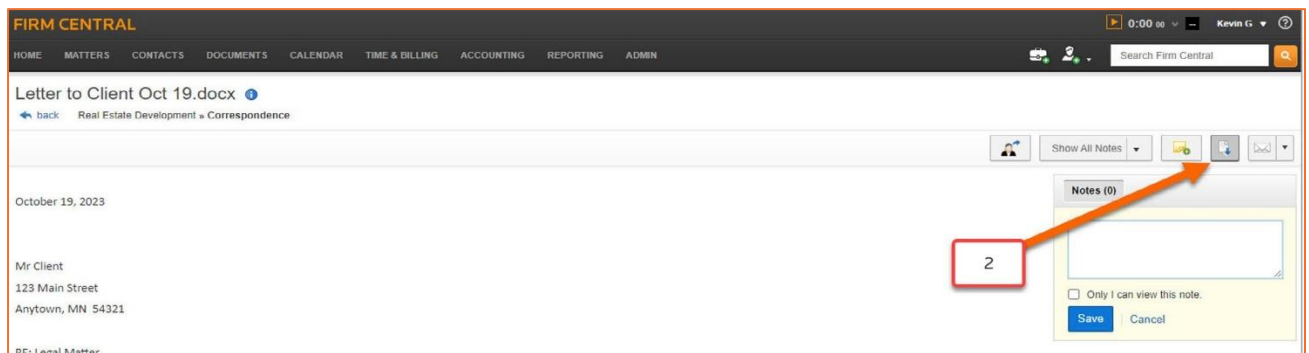
Exporting Documents

Download a single document from a matter in Firm Central:

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



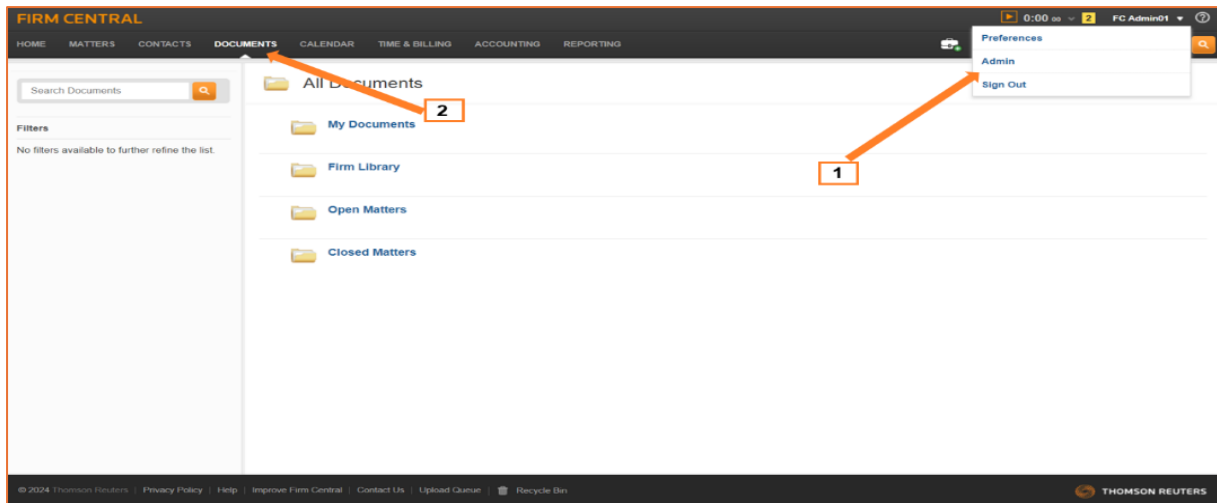
2. In the upper right corner click on the Export icon. Your document will be downloaded in its original format.



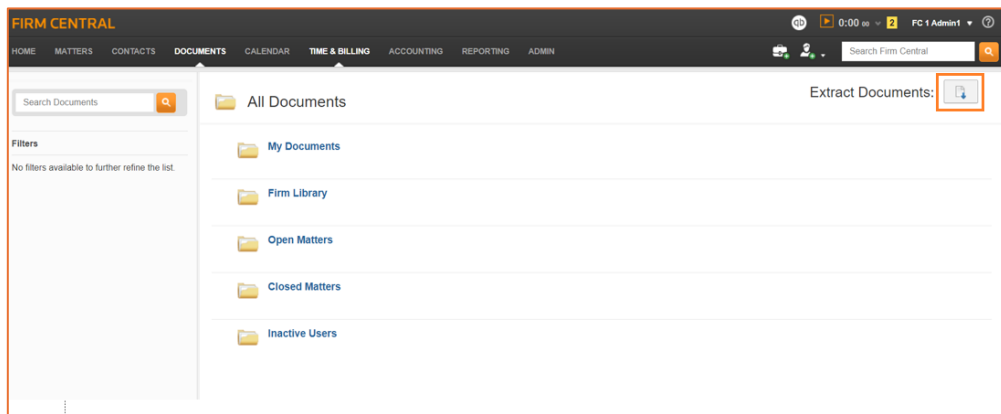
Download Bulk Documents in Firm Central

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.



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.

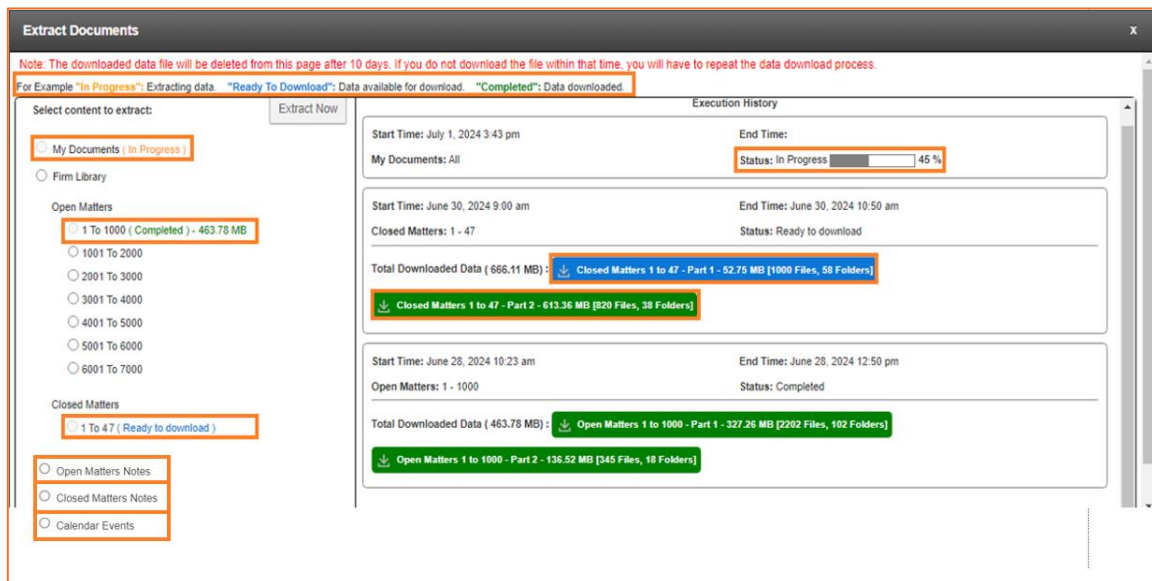


5. After selecting the "Extract Documents" icon, a dialog box will open, allowing you to select the matters from the "Select Content to Extract" section to download documents.
 - a. My Documents: This will download the My Documents content from all users.
 - b. Firm Library: This will download all documents 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.
9. 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.

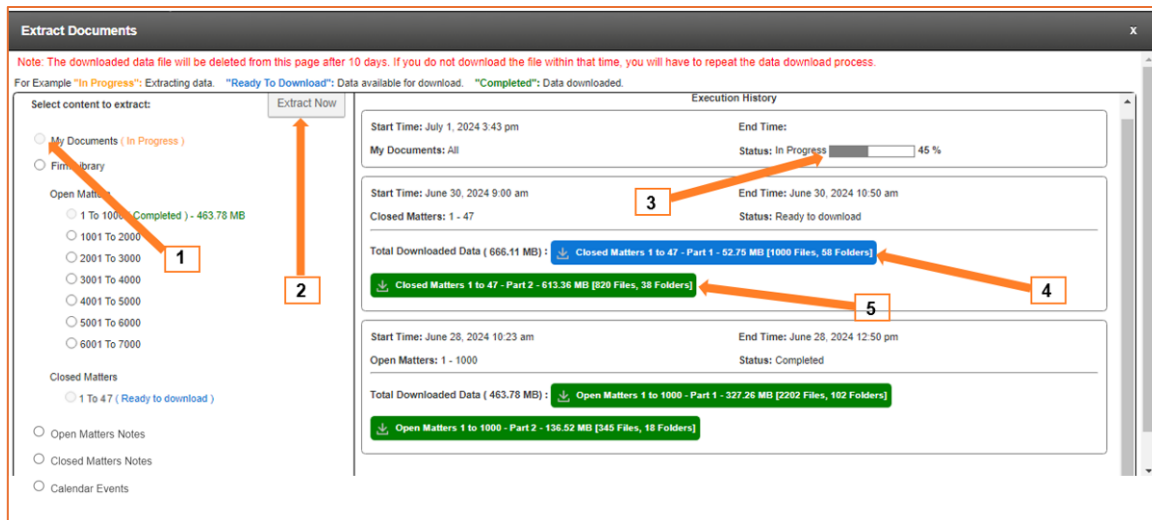


Download bulk Documents:

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.



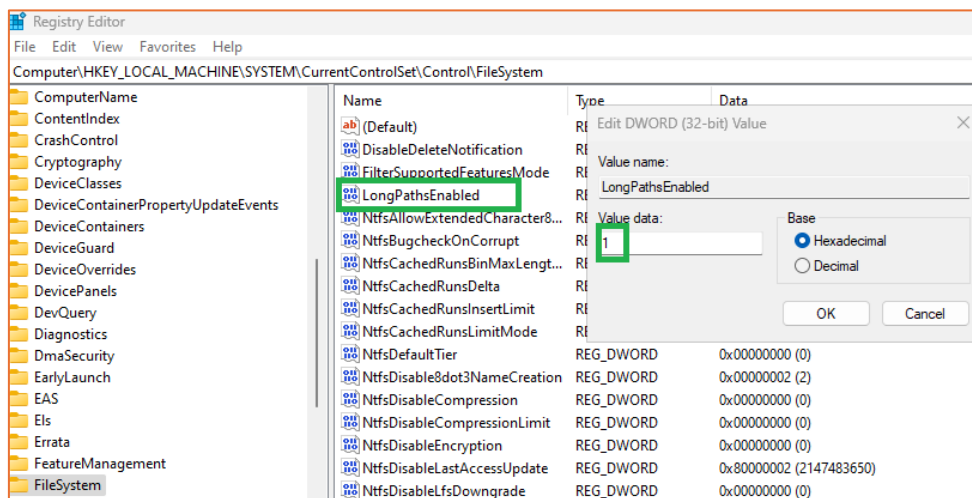
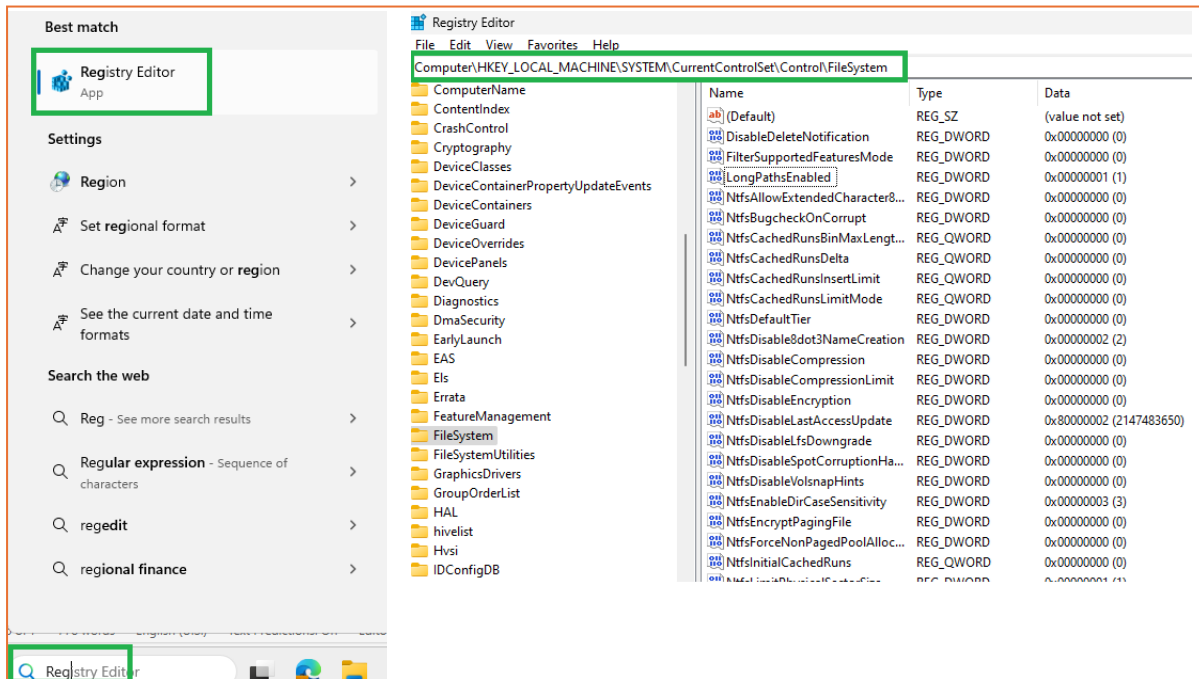
9. The data will be in the form of zipped bundle files. You will need to use a decompression utility to unzip these files.

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 - <https://answers.microsoft.com> 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.



11. Use a decompression utility that can handle long file path names, such as 7Zip (<https://www.7-zip.org/>), 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.

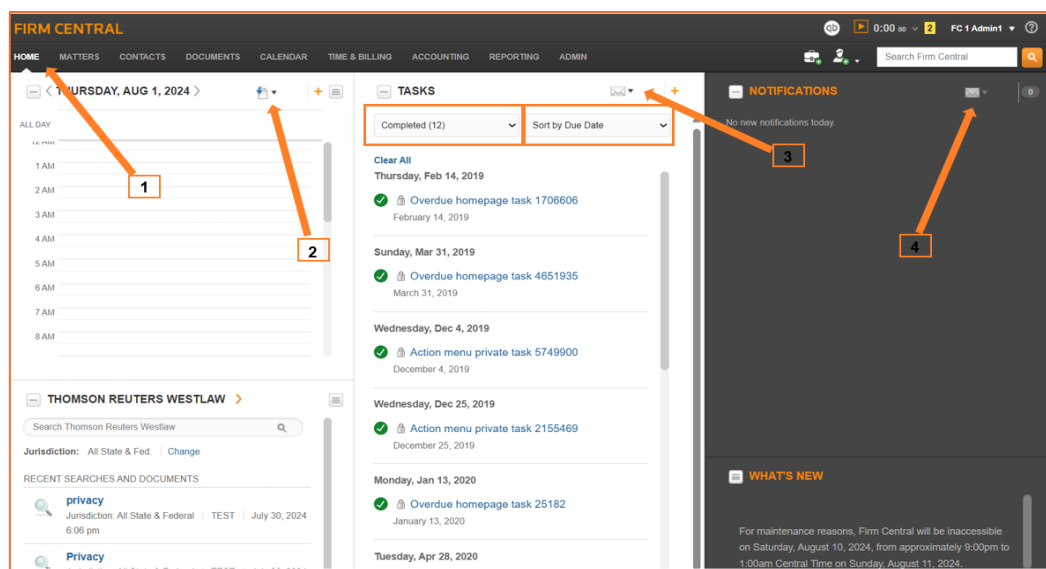
Note: Links contained in Matter folders to Westlaw research documents will not download the full Westlaw documents. You will be able to go to your Firm Central folders within Westlaw to get those documents.

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.

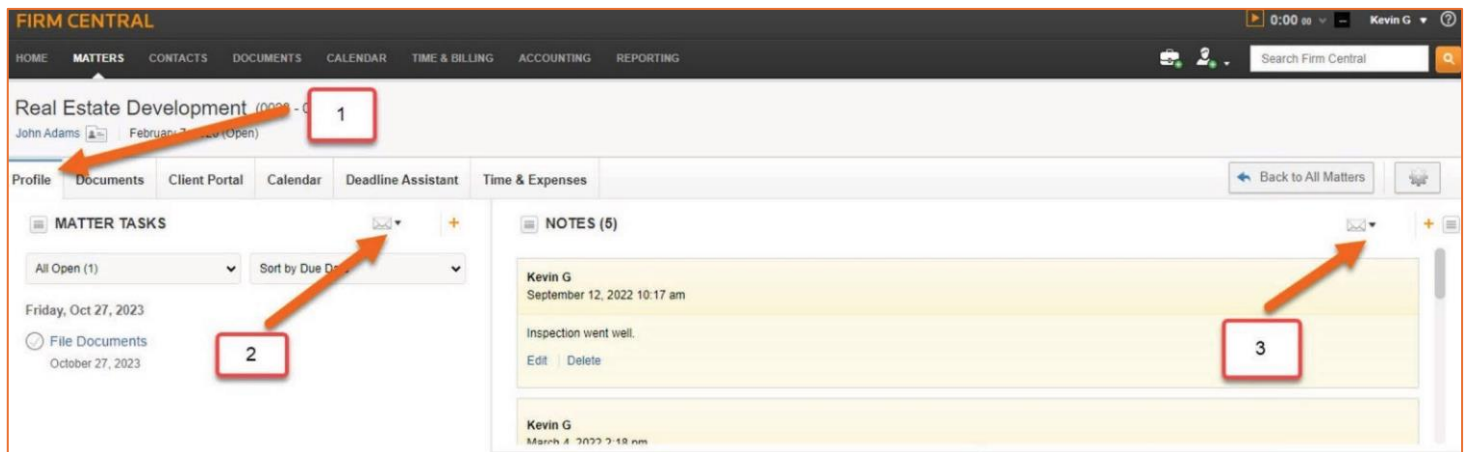


Export data from within a specific Matter.

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.



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.

FIRM CENTRAL 0:00 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** 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
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 6.01(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:

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.

FIRM CENTRAL 0:00 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** 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

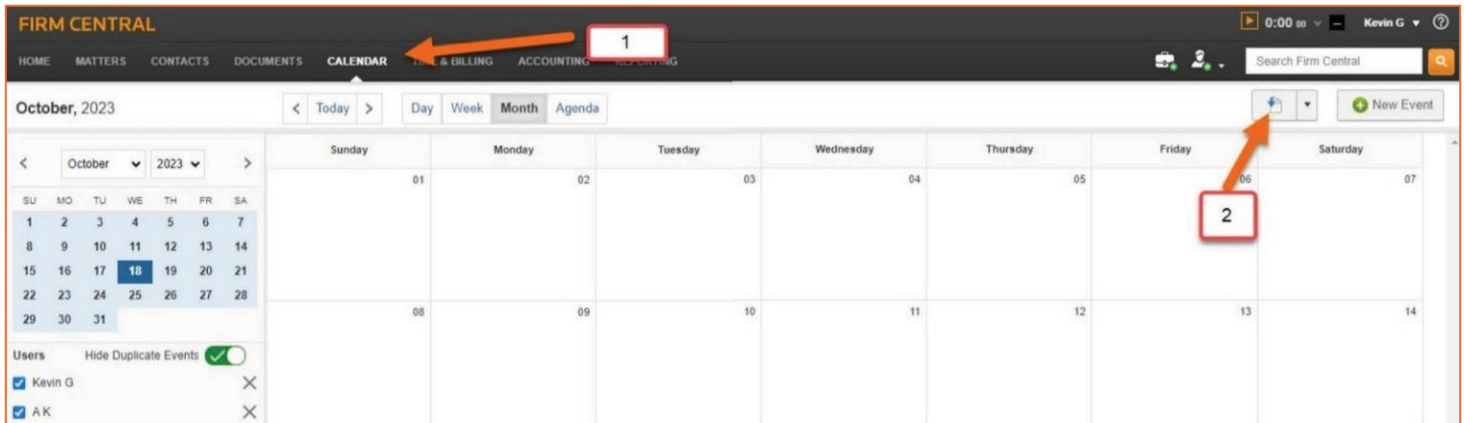
Reset + Time Entry

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 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.
4. 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.

Download

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 an 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)

and

Which events do you want to include?

What format do you want to receive?

Deliver As

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.
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.

Note: You can export 730 days (about 2 years) of data at a time.

Export X

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
Single File

Export Cancel

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 'TIME & BILLING' tab selected. The 'Expense Entry' sub-tab is active. The interface includes a search bar, a user selection dropdown (labeled 3), a date range selector (labeled 4), and a table of expense entries (labeled 1). A total amount of \$55.00 is displayed. A callout labeled 5 points to the export icon (a down arrow) in the top right corner of the table.

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

The 'Export' dialog box is shown with the following fields and options:

- File Name***: Firm Central FC Admin1 Expense Entry List
- Select Transactions for statements:** Transactions between (limited to 730 days)
 - 01/01/2022 to 12/31/2023
- Format**: CSV
- Deliver As**: Single File
- Buttons**: Export, Cancel

Pre-Bills 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 the down arrow.
7. Select "Download".

The screenshot shows the 'FIRM CENTRAL' interface with the 'TIME & BILLING' tab selected. The 'Pre-Bills' sub-tab is active. The interface includes a 'Generate Pre-Bills' section at the top with a date range selector and a 'Generate Pre-Bills' button. Below this is a table of pre-bills with columns for Generated Date, Start, End, Lead, Client, Matter, Matter ID, Total, and Status. A 'Download' button is visible in the top right of the table. Numbered callouts (1-7) point to various elements: 1 points to the 'TIME & BILLING' tab; 2 points to the 'Pre-Bills' sub-tab; 3 points to the 'Generate Pre-Bills' button; 4 points to the 'Download' button; 5 points to a row in the pre-bills table; 6 points to the 'Download' button; and 7 points to the 'Download' button.

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.

The 'Download' pop-up window displays the following options:

- Pre-Bills Selected (4)**
- Select Content to Download**
 - ☒ Download Pre-Bills
 - ☐ Download List of Pre-Bills
- File Name***
- Format**

PDF
- Deliver As**
 - ☒ Single File
 - ☐ Multiple Files (Zip)
- Buttons:** 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. 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 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.

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

The screenshot shows the 'FIRM CENTRAL' interface. At the top, a navigation bar includes 'HOME', 'MATTERS', 'CONTACTS', 'DOCUMENTS', 'CALENDAR', 'TIME & BILLING', 'ACCOUNTING', and 'REPORTING'. A red box labeled '1' highlights the 'REPORTING' tab. Below this, a sub-navigation bar includes 'Time Entry', 'Expense Entry', 'Pre-Bills', 'Payment & Invoices', 'Trusts & Retainers', and 'All Accounts'. A red box labeled '2' highlights the 'All Accounts' tab. The main content area is titled 'All Accounts' and shows a 'Total Outstanding' of '\$661.00'. A search bar labeled 'Search All Accounts' is present, with a red box labeled '3' highlighting it. A checkbox labeled 'Include open matters with zero balances' is also shown, with a red box labeled '4' highlighting it. A table of accounts is displayed with columns: Client, Matter, Matter ID, Lead, Matter Balance, and Account Summary. A red box labeled '5' highlights the 'Client' column. A red box labeled '6' highlights the 'Matter Balance' column. A red box labeled '6' also highlights the 'Account Summary' column. A red box labeled '6' highlights the 'Run' button in the top right corner of the table.

Client	Matter	Matter ID	Lead	Matter Balance	Account Summary
Abilene, Joseph	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, 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.
 6. 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.

The screenshot shows the FIRM CENTRAL Reporting interface. The top navigation bar includes links for HOME, MATTERS, CONTACTS, DOCUMENTS, CALENDAR, TIME & BILLING, ACCOUNTING, and REPORTING (highlighted with a red box and arrow labeled 1). Below the navigation bar, the 'Reports' tab is selected (highlighted with a red box and arrow labeled 2). A search bar for 'Search Reports' is present (highlighted with a red box and arrow labeled 3). The main table lists various reports with columns for Report, Description, and Category. The 'Run' button for each report is highlighted with a red box and arrow labeled 4. The 'Category' column is highlighted with a red box and arrow labeled 5. The 'Run' button for the 'Time by User' report is highlighted with a red box and arrow labeled 6.

Report	Description	Category	Run
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	Run
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	Run
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 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
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

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.
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.

FIRM CENTRAL

HOME MATTERS CONTACTS DOCUMENTS CALENDAR TIME & BILLING ACCOUNTING REPORTING ADMIN

Search Firm Central

Time by User

User: All Users Date Range: 09/01/2023 to 09/30/2023 Run

External narratives may be too long to display on some report types. Full narratives are included on csv and excel exports.

Acme Law Firm
1234 XYZ Street
Minneapolis, MN 55123

Date Range: 09/01/2023 - 09/30/2023

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	Kevin 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 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).

FIRM CENTRAL

HOME MATTERS CONTACTS DOCUMENTS CALENDAR TIME & BILLING ACCOUNTING REPORTING ADMIN

Accounts Receivable Accounts Payable Chart of Accounts Checks

Apply Payment

Invoice Number: [Enter number] Payment Amount: \$ [Enter amount] Payment Type: [Select] Payor/Payee: [Select]

Description: [Text area]

Apply Payment Cancel

Invoices

Date	Invoice #	Lead	Client	Matter	Matter ID	Send By	Amount	Paid	Due	Status
09/06/2023	1440	KG	Franklin, Ben	Contract Review	0036		\$500.00	\$0.00	\$500.00	OVERDUE
09/06/2023	1439	KG	Franklin, Ben	Real Estate Development, Franklin	0028		\$161.00	\$0.00	\$161.00	OVERDUE
Total							\$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 web application interface. At the top, the 'ACCOUNTING' tab is selected in the main navigation bar. Below it, the 'Accounts Payable' sub-tab is active. The interface displays a summary of payables with several boxes: 'Total Outstanding (2)' for \$1,150.00, and several age-based categories (0-30, 31-60, 61-90, Over 90 Days) all showing \$0.00. An 'All Payables (2)' box also shows \$1,150.00. Below the summary is a table of payables with columns: Date, Due Date, Vendor, Reference, Due In, Status, Amount, Paid, and Balance. Two entries are listed: one for 'AAA Properties' (Jan Rent) and another for 'Cell Phones R Us' (April Phone bill). To the left of the table is a 'Select All' checkbox. To the right are buttons for '+ Payable' and '+ Payment'. A 'Download' button with a dropdown arrow is also present. Numbered callouts indicate: 1. 'ACCOUNTING' tab; 2. 'Accounts Payable' sub-tab; 3. 'Select All' checkbox; 4. 'Total Outstanding' box; 5. 'Download' button; 6. 'All Payables' box.

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.

The 'Download' pop-up window has a title bar with 'Download' and a close button. It contains the following fields and options:

- Firm Central 2 Account Payables List**
- 2 Account Payable(s)**
- File Name ***: A text input field containing 'Firm Central 2 Account Payables List'.
- Format**: A dropdown menu currently set to 'CSV'.
- Deliver As**: A section with the option 'Single File' selected.
- At the bottom are two buttons: 'Download' and '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.

FIRM CENTRAL

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

Accounts Receivable Accounts Payable Chart of Accounts Checks

Accounts Payable

Payables Payments **Credit Notes**

Search Payments

+ Payable + Payment

<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

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.

FIRM CENTRAL

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

Accounts Receivable Accounts Payable Chart of Accounts Checks

Accounts Payable

Payables Payments **Credit Notes**

Search Credit Notes

+ Payable + Payment

Date	User	Vendor	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 4 entries

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”.

- To capture all the Chart of Accounts data, select the "All" box. You can also select individual account categories, if so desired.
- Click the "Select All" box on the far left on the page.
- 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.

FIRM CENTRAL

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

Accounts Receivable Accounts Payable **Chart of Accounts** Checks

Chart of Accounts

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

Search Chart of Accounts ☐ Include Inactive

Account Number	Account Name	Type	Status	Balance
<input checked="" type="checkbox"/> 10000	Operating Account - Checking	Asset	Active	3,422,467.28
<input checked="" type="checkbox"/> 10011	Mastercard	Asset	Active	(5,935.17)
<input checked="" type="checkbox"/> 10012	Credit Card - Opening Balance	Asset	Active	5,400.00
<input checked="" type="checkbox"/> 10100	Trust Account	Asset	Active	\$15,436.78
<input checked="" type="checkbox"/> 10101	Investment Account	Asset	Active	15,000.00
<input checked="" type="checkbox"/> 10200	Credit Card	Asset	Active	1,919.88
<input checked="" type="checkbox"/> 10300	Escrow IOLTA	Asset	Active	1,043,316.88
<input checked="" type="checkbox"/> 10400	IOLTA 2B	Asset	Active	2,021.00
<input checked="" type="checkbox"/> 10501	Bank of America VISA	Asset	Active	(1,200.00)

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.

- Begin by selecting your date range.
- Click the "Select All" box on the far left on the page.
- 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

Date	Type	Ref Number	Description	Debits	Credits	Balance
10/12/2022	AP Payment	filing fee	Dakota County Clerk - filing fee		\$25.00	\$3,346,035.84
10/12/2022	Deposit	interest for Sept	interest for Sept	\$6.02		\$3,346,060.84
10/12/2022	Invoice Pay...	Ben Franklin - 0036 - CK#11123	Ben Franklin - 0036 - CK#11123	\$1,220.00		\$3,346,054.82
09/26/2022	Invoice Pay...	John Adams - 0182 - CK#11123	John Adams - 0182 - CK#11123	\$1,490.00		\$3,344,834.82
09/20/2022	AP Payment	Photocopy Paper	Discount Office Supplies - Office Supplies		\$25.00	\$3,343,344.82
09/19/2022	Deposit	interest for August	August Interest	\$6.02		\$3,343,369.82
09/19/2022	AP Payment	Sept Rent	AAA - Sept Rent		\$1,100.00	\$3,343,363.80
09/19/2022	Invoice Pay...	1393	Ben Franklin - 0036 - CK#1111	\$100.00		\$3,344,463.80
09/19/2022	Invoice Pay...	1400	Acme Corp - 0072 - Reversal 09/19/2022, KG, Check, CK#11	(\$100.00)		\$3,344,363.80
09/19/2022	Invoice Pay...	1400	Acme Corp - 0072 - CK#11	\$100.00		\$3,344,463.80

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 interface with the 'Checks' tab selected. Red boxes with numbers 1 through 5 and orange arrows point to the following elements:

- 1:** The 'ACCOUNTING' menu item in the top navigation bar.
- 2:** The 'Filter by' dropdown menu set to 'All Bank Accounts'.
- 3:** The 'Include Printed/Voided' checkbox, which is checked.
- 4:** The 'Select All' checkbox in the table header.
- 5:** The 'Print' button in the top right corner.

Date	User	Account #	Type	Payee	Reference	Check #	Status	Amount	
09/14/2018	JG	10000	Payable	E-File Service	Fees	123	Printed	12.00	Print
09/14/2018		10000	Payable	E-File Service	124	124	Printed	50.00	Print
09/21/2018	KG	10000	Payable	Copy Center	1245	1245	Printed	40.00	Print
09/24/2018	JG	10000	Payable	Office Equipment Supply	1234	1234	Printed	575.00	Print
09/25/2018	JG	10000	Payable	Office Equipment Supply	100	100	Printed	300.00	Print
09/25/2018	JG	10000	Firm Expense	Copy Center	1254	1254	Printed	50.00	Print
09/28/2018	AKR	10000	Payable	E-File Service	1234	1234	Printed	300.00	Print
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
10/30/2018		10000	Payable	Copy Center	1234	1234	Printed	50.00	Print

Exporting data from a lapsed Firm Central subscription

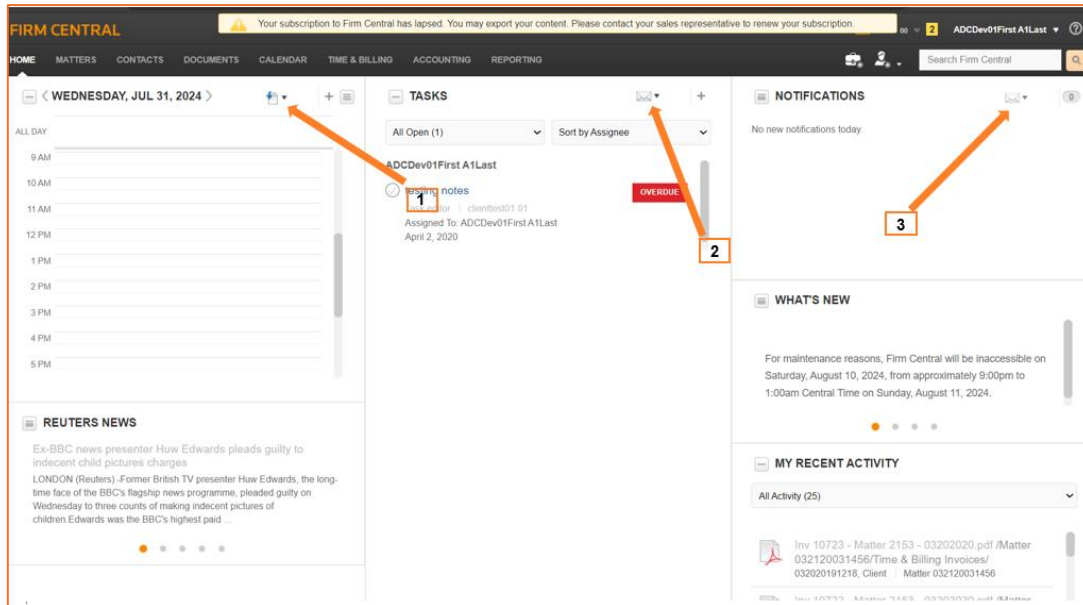
This section will provide information on how to export your data from a Firm Central subscription that has been lapsed. The first thing to note is that you will have 180 days (about 6 months) after the lapse date to access Firm Central. Your access will be limited, and we shall review that here in this 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

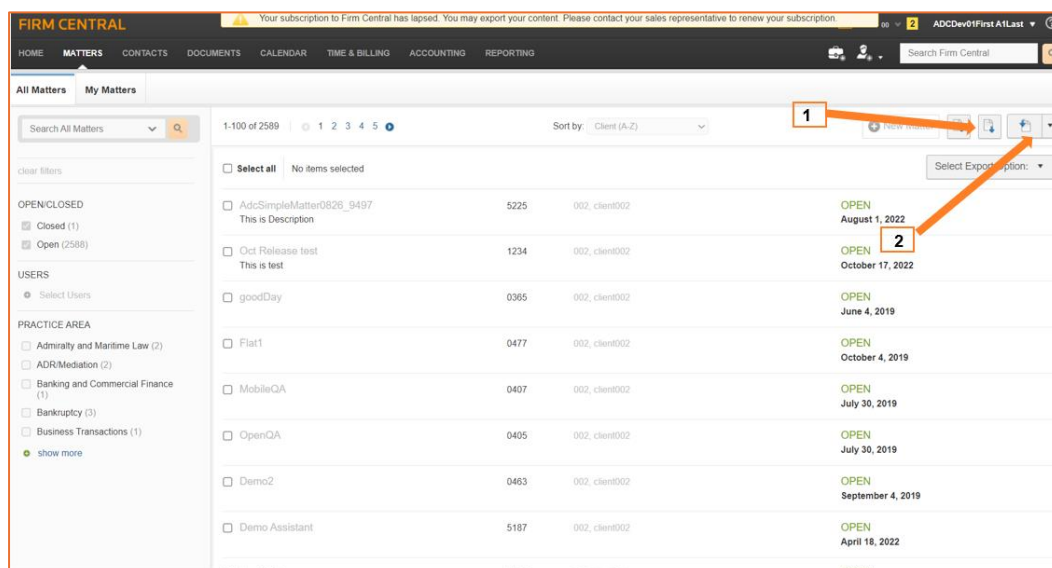


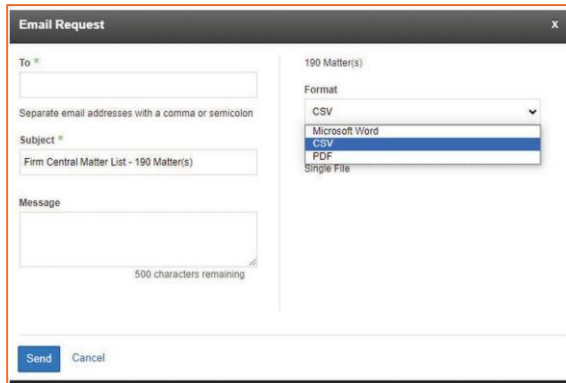
Matters

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.





Email Request

To *

Separate email addresses with a comma or semicolon

Subject *

Firm Central Matter List - 190 Matter(s)

Message

500 characters remaining

Format

190 Matter(s)

CSV

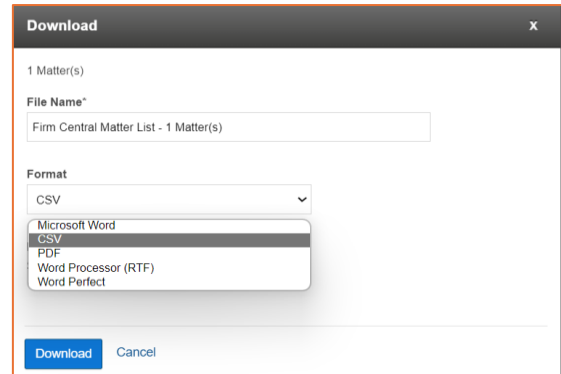
Microsoft Word

CSV

PDF

Single File

Send Cancel



Download

1 Matter(s)

File Name*

Firm Central Matter List - 1 Matter(s)

Format

CSV

Microsoft Word

CSV

PDF

Word Processor (RTF)

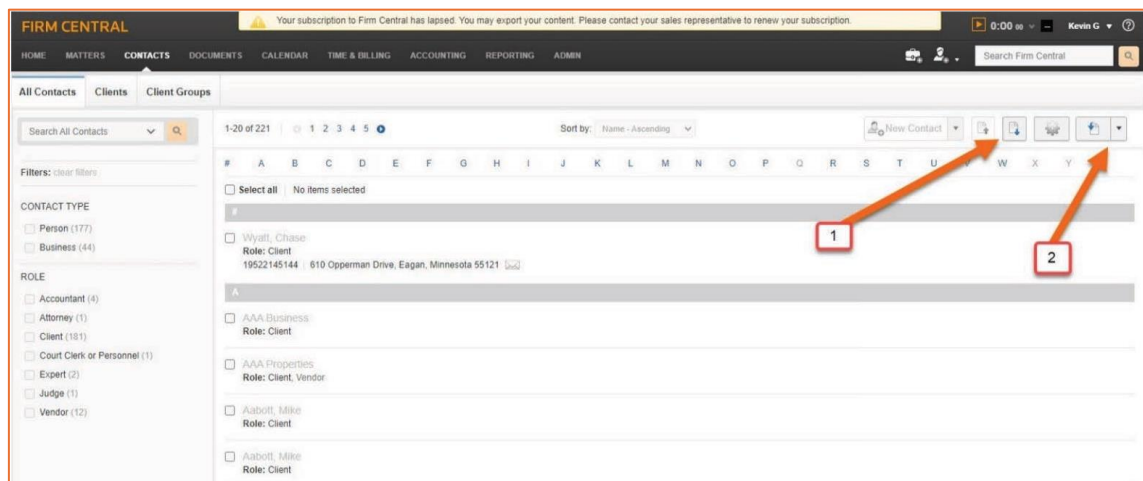
Word Perfect

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.
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.



FIRM CENTRAL

Your subscription to Firm Central has lapsed. You may export your content. Please contact your sales representative to renew your subscription.

0:00 Kevin G

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

Search Firm Central

All Contacts Clients Client Groups

Search All Contacts

Filters: Clear Filters

CONTACT TYPE

Person (177)

Business (44)

ROLE

Accountant (4)

Attorney (1)

Client (181)

Court Clerk or Personnel (1)

Expert (2)

Judge (1)

Vendor (12)

1-20 of 221

Sort by: Name - Ascending

New Contact

1

2

Wyatt, Chase

Role: Client

19522145144 610 Opperman Drive, Eagan, Minnesota 55121

AAA Business

Role: Client

AAA Properties

Role: Client, Vendor

Abbott, Mike

Role: Client

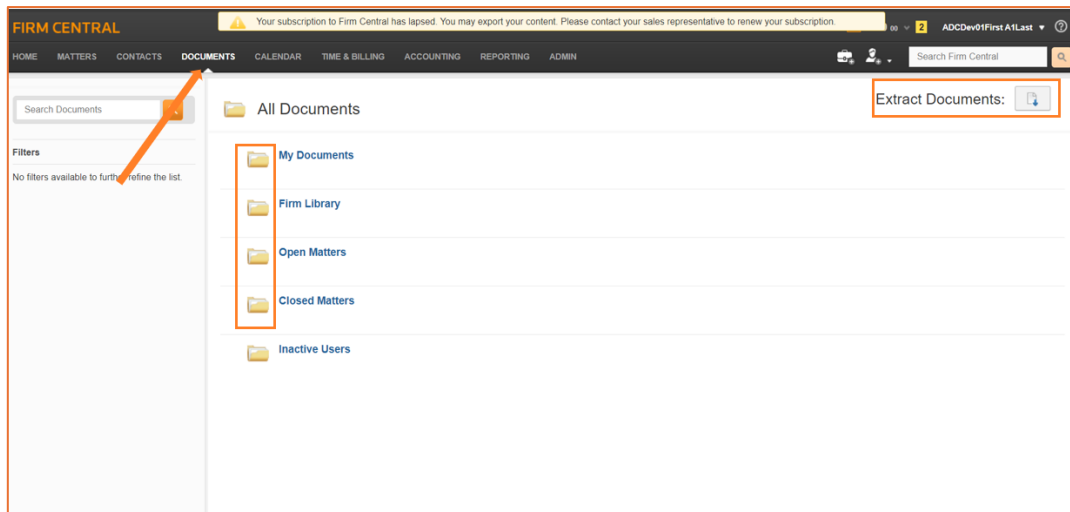
Abbott, Mike

Role: Client

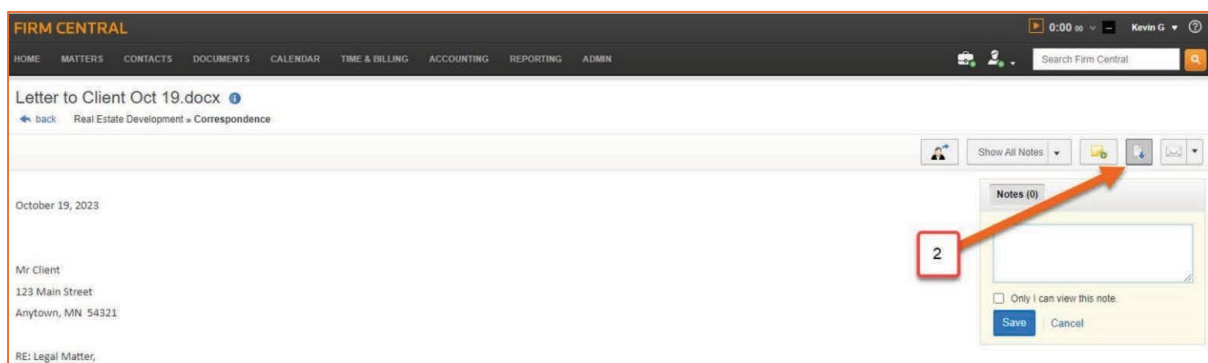
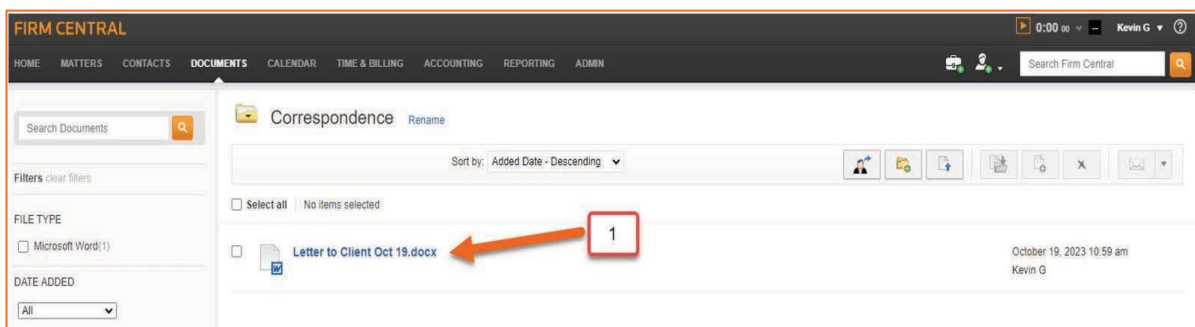
Documents

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.



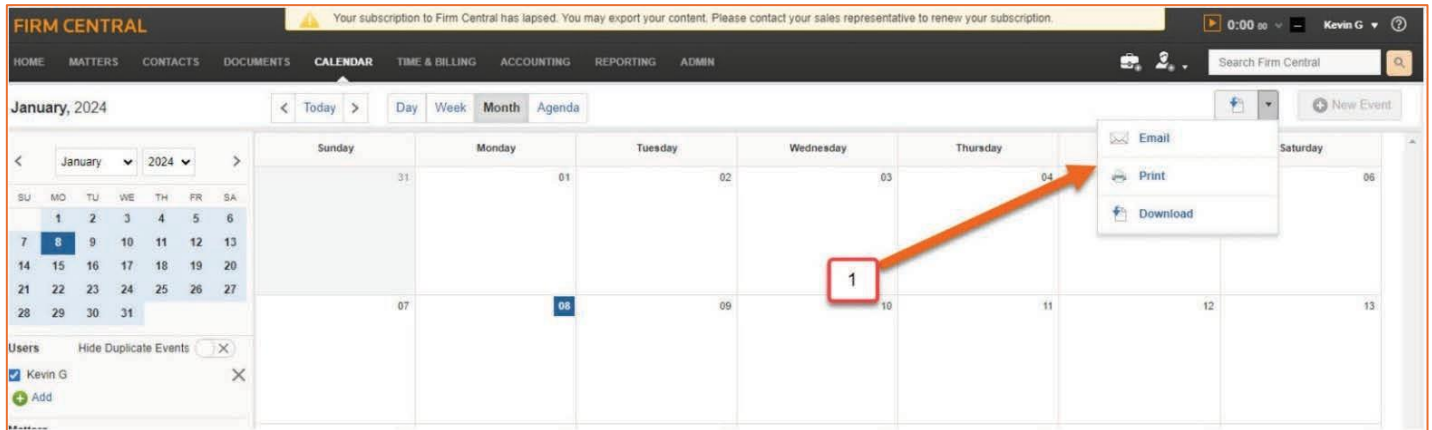
1. Select the individual document by clicking on the document name highlighted in blue.
2. Then, in the upper right corner click on the export icon. Your document will be downloaded in its original format.



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.



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.

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.

FIRM CENTRAL ⚠ Your subscription to Firm Central has lapsed. You may export your content. Please contact your sales representative to renew your subscription. 0:00 00 Kevin G

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

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

Time Entry Daily Total
0.00 \$0.00

G, Kevin

Monday, Jan 15, 2024 Go < Today > Day Week + Time Entry Save

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 Select Matters Manage Pre-Bill Groups

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

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.

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0:00 Kevin G

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) Attorney 1 (2)

UNBILLED TIME \$0.00 UNBILLED TIME \$0.00

Oldest Item: Oldest Item:

Enter Date Range 01/15/2024 Generate Pre-Bills

Pre-Bills

Search Pre-Bills

	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

Finalize Remove Generate Invoice

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.

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0:00 Kevin G

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

State of Florida vs Dwayne Johnson (0085 - 0101) Fee Arrangement: Hourly

Aguire, Grisel Billable Date Range: 11/14/2018 to 01/08/2024

Time Entries Expense Entries Invoice Summary

All Users

Time Entries

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

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

Invoice Total \$1,926.67

Finalize Generate Invoice

Remove + Time Entry Save

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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0:00 38 Kevin G

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

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

Apply Payment

Invoice Number * Payment Date *

Payment Amount * Payment Type *

Payor/Payee

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"/>	01/08/2024	431		Arnold, Tom	Trust Administration	0205		\$25.00	\$0.00	\$25.00	Unpaid
<input type="checkbox"/>	01/08/2024	430		Ammentorp, Bob	Applearts	0411		\$0.58	\$0.25	\$0.33	Partial
<input type="checkbox"/>	08/10/2023	422		Scott, Abby	Real Estate Millions	0359		\$5,000.00	\$0.00	\$5,000.00	OVERDUE
<input type="checkbox"/>	05/30/2023	420		Ammentorp, Bob	Applearts	0411		\$70.00	\$25.00	\$45.00	OVERDUE
<input type="checkbox"/>	05/01/2023	413		Applearts	Applearts	0401		\$200.00	\$0.00	\$200.00	OVERDUE
<input type="checkbox"/>	03/13/2023	378		White, Molly	Copyright, Molly W.	0073	Email	\$2,550.00	\$2,000.00	\$550.00	OVERDUE

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.

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0:00 38 Kevin G

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

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

Invoice #430
Invoice Amount \$0.58

Transactions

Date	User	Payment Type	Payor/Payee	Description	Amount
01/08/2024	KG	Check		CKF 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.lawfirmcentral.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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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"/>	Springboards - Retainer	Aabott, Mike	Springboards	0347		Matter Retainer	\$25,000.00
<input type="checkbox"/>	Abacus - Pre-payment					Client Pre-payment	\$25.00
<input type="checkbox"/>	Vaudeville - Retainer	Abbott Costello	Vaudeville	0261		Matter Retainer	\$2,500.00
<input type="checkbox"/>	Shelly - Trust Account	Acme Phone	Shelly	0111		Matter Trust Account	\$5,000.00
<input type="checkbox"/>	Acme Waxworks - Trust Account	Acme Waxworks				Client Trust Account	\$35.00
<input type="checkbox"/>	Aquariums - Retainer	Acme Waxworks	Aquariums	0105		Matter Retainer	\$3,000.00
<input type="checkbox"/>	Abbott Abbott - Retainer	Adams, Abe	Abbott Abbott	0255		Matter Retainer	\$2,590.00
<input type="checkbox"/>	Fabulous - Trust Account	Adams, Rachel	Fabulous	0099		Matter Trust Account	\$5,500.00
<input type="checkbox"/>	State of Florida vs Dwayne Johnson - Retai...	Aguirre, Grisell	State of Florida vs Dwayne Johnson	0101		Matter Retainer	\$3,073.33
<input type="checkbox"/>	Powerball Winner of 360 Million - Trust Acc...	Amos, Dawn	Powerball Winner of 360 Million	30-7514		Matter Trust Account	\$7,680.00

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

SPRINGBOARDS - RETAINER | Matter Retainer Date Opened: Nov. 30, 2022 Open

Springboards (0347) Mike Aabott

Search Transactions Go

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	\$0.00	\$25,000.00	\$25,000.00

Showing 1 to 1 of 1 entries 1

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.

FIRM CENTRAL Your subscription to Firm Central has lapsed. You may export your content. Please contact your sales representative to renew your subscription. 0:00 Kevin G

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

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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 Total Outstanding **\$440,601.89**

Search All Accounts ☐ Include open matters with zero balances

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

Accounts Receivable **Accounts Payable** Chart of Accounts Checks

Apply Payment

Invoice Number * Payment Date *

Payment Amount * Payment Type *

Payor/Payee

Description 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"/>	01/08/2024	430		Ammentorp, Bob	Applecarts	0411		\$0.58	\$0.25	\$0.33	Partial
<input type="checkbox"/>	08/10/2023	422		Abbott, Alvy	Real Estate Millions	0359	✓	\$5,000.00	\$0.00	\$5,000.00	OVERDUE
<input type="checkbox"/>	05/30/2023	420		Ammentorp, Bob	Applecarts	0411		\$70.00	\$25.00	\$45.00	OVERDUE
<input type="checkbox"/>	05/01/2023	413		Anderson, Jeff	Plumhinn	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.

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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HOME MATTERS CONTACTS DOCUMENTS CALENDAR TIME & BILLING ACCOUNTING REPORTING ADMIN

Dashboard Reports

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

Search Reports

Report	Description	Category	
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 report 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
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
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 DOCUMENTS CALENDAR TIME & BILLING ACCOUNTING REPORTING ADMIN

Administration

Accounting
Conflict Checking
Firm User Management
Import Firm Data
Customization
Settings & Storage
Thomson Reuters Product Integrations
Deadline Assistant
Time & Billing
Product Integrations

General Information Chart of Accounts Financial Institutions Auto-Posting Accountant Access

Accounting Method
☒ Accrual
☐ Cash

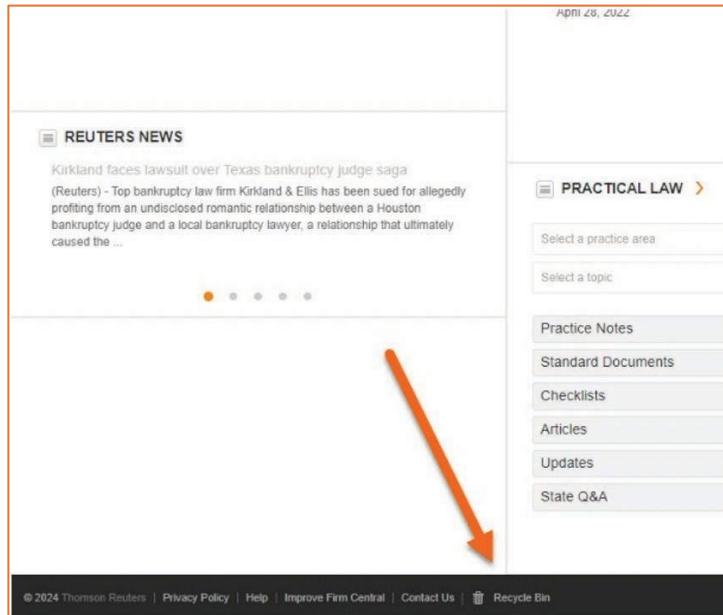
Accounting Periods
 Fiscal Years
 2018 [Add fiscal year](#)

Use Fiscal Periods ☒

Default Period ☐ Period End Dates 01/30/2018 Locked [Lock](#)

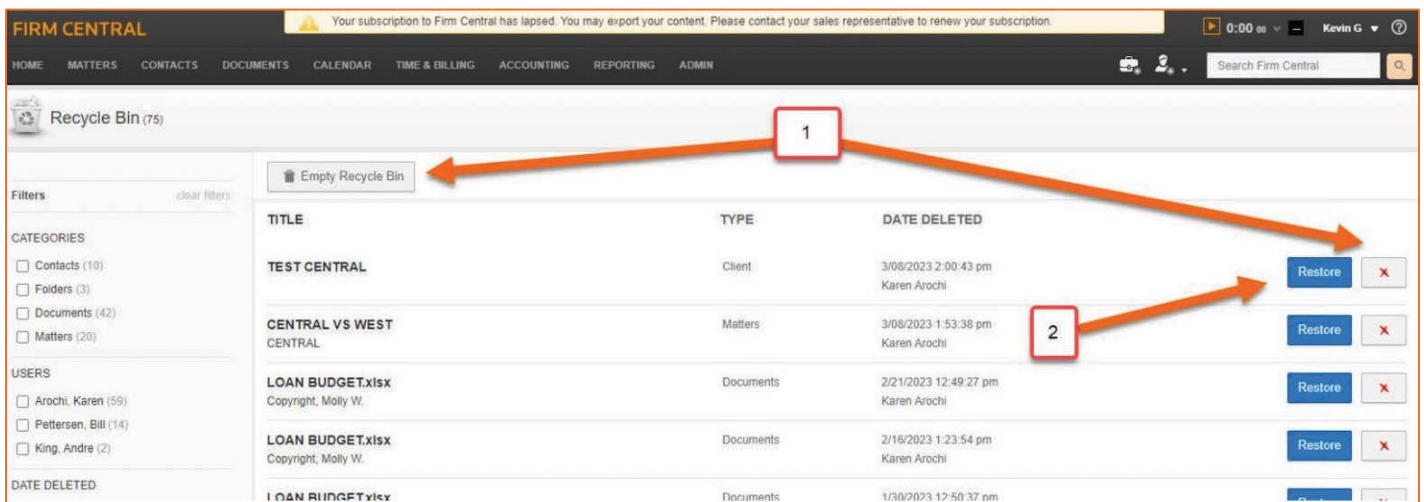
Recycle Bin

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.



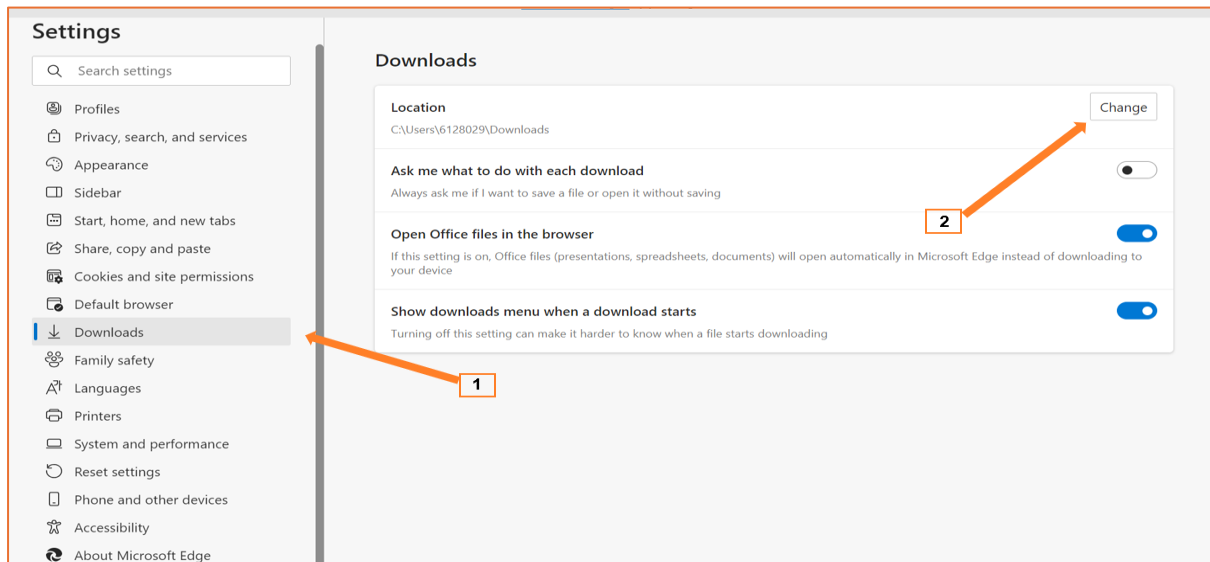
Change the download location in browser.

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.



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.

