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.

Table of contents

Steps to assign an Admin to All Matters. 2

Exporting Clients and Contacts 3

Exporting Matters 4

Exporting Documents 16

Export data from the Home Page 21

Export data from within a specific Matter. 21

Exporting Calendar Events 24

Time & Billing 25

Reporting 29

Accounting 31

Exporting data from a lapsed Firm Central subscription 35

Administrative Menu 46

Recycle Bin 46

Change the download location in browser. 48

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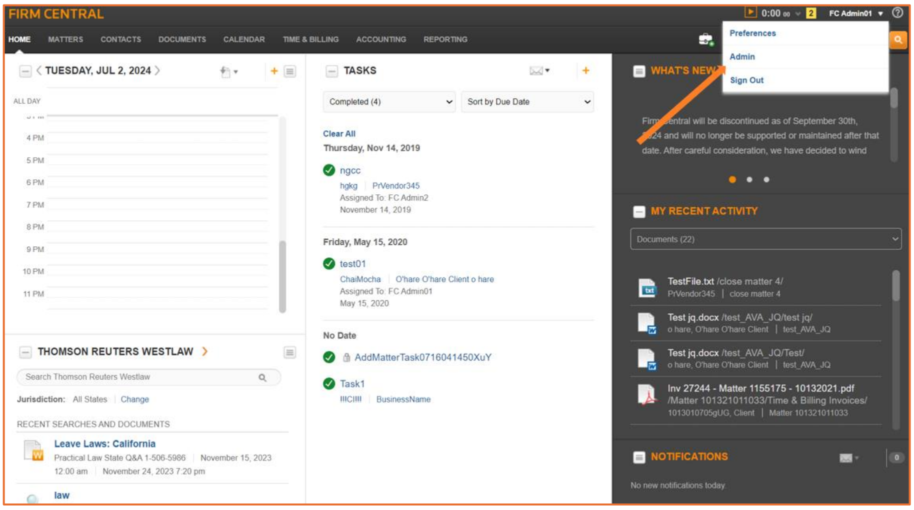
Steps to assign an Admin to All Matters.

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.

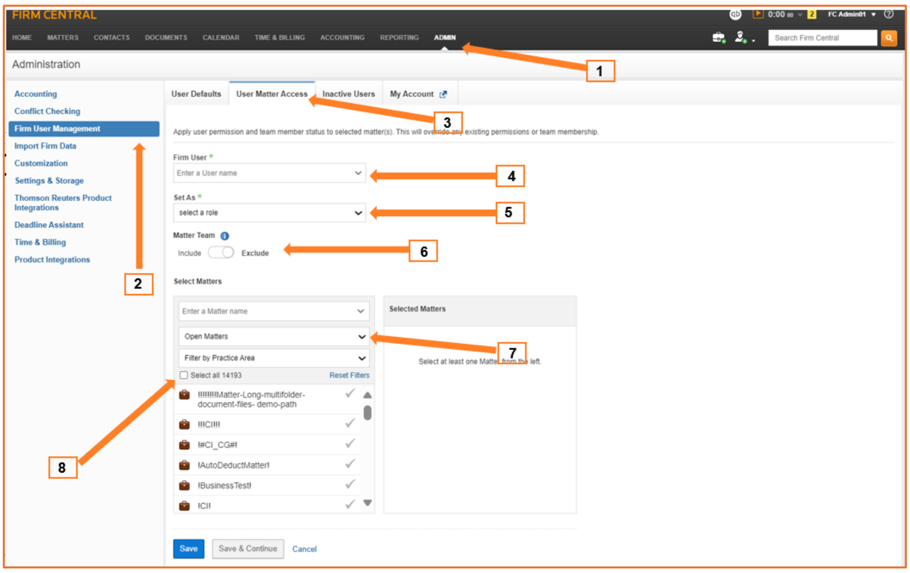
1. Enter your OnePass username and password to gain access to Firm Central.
2. Once you have provided the credentials, you will land on the Firm Central Home page.
3. Select the profile menu in the upper right corner.
4. Select “Admin” from the drop-down menu.
5. Upon selection of Admin, you will be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



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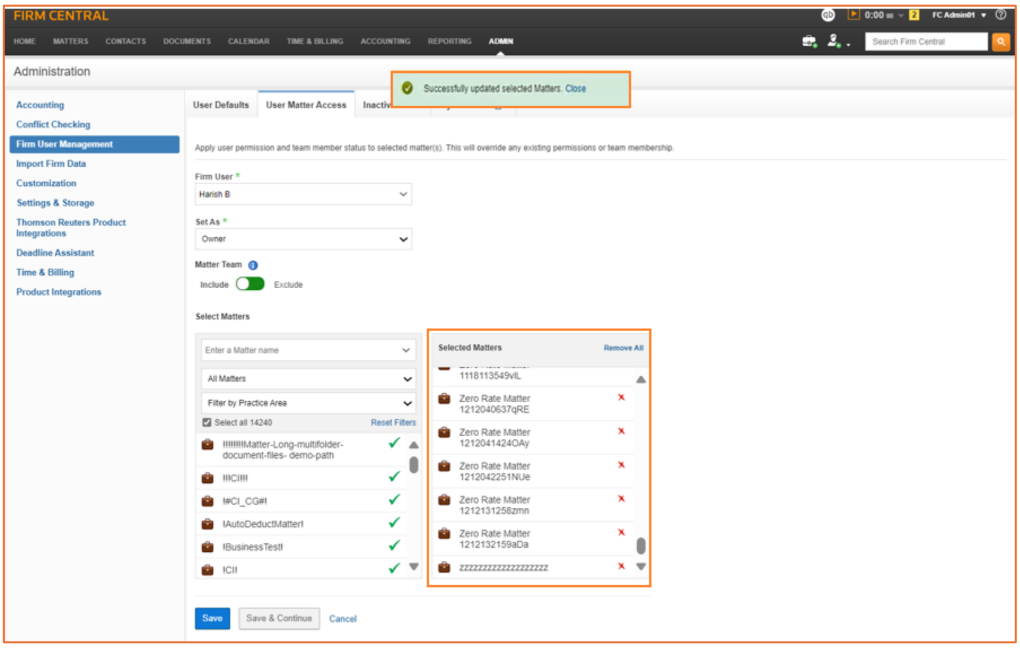
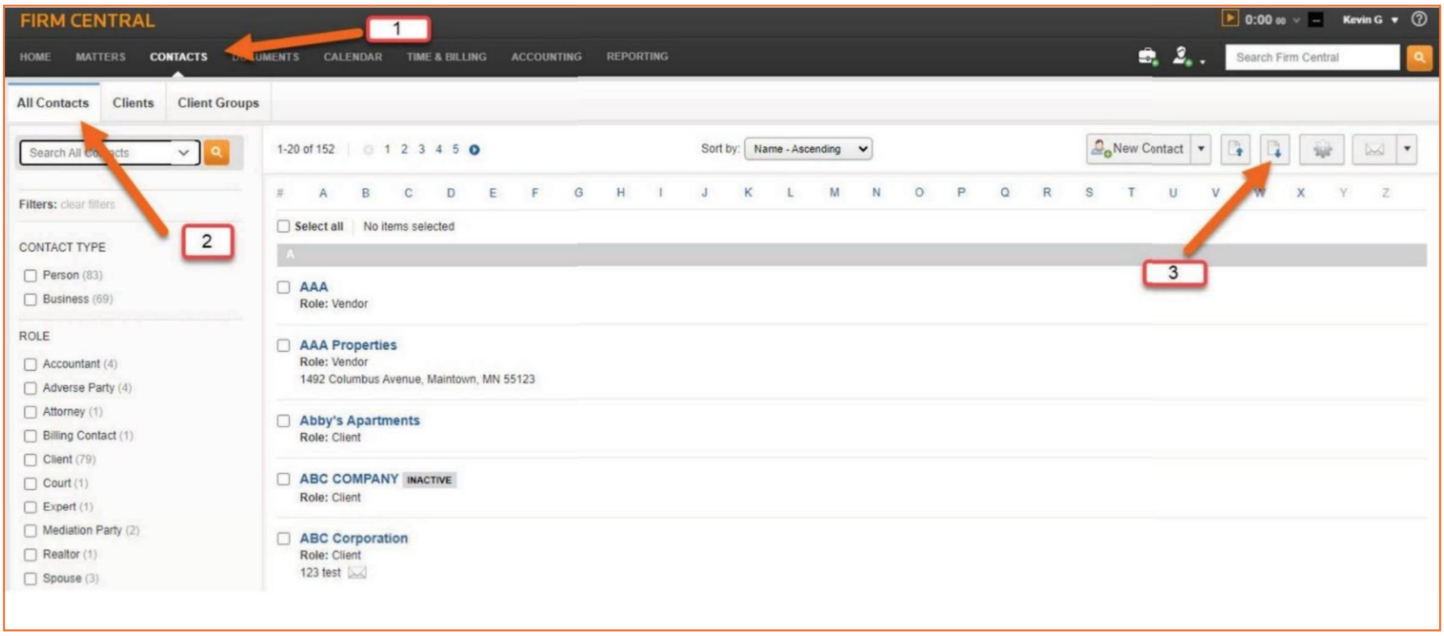
9. You can see all Matters moved to “Selected Matters” section
10. Then click on the Save button to assign all selected Matters to the user. This may take some time depending on how many Matters you have selected.
11. You will see a successful message once all the Matters have been assigned to the Admin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



Exporting Clients and Contacts

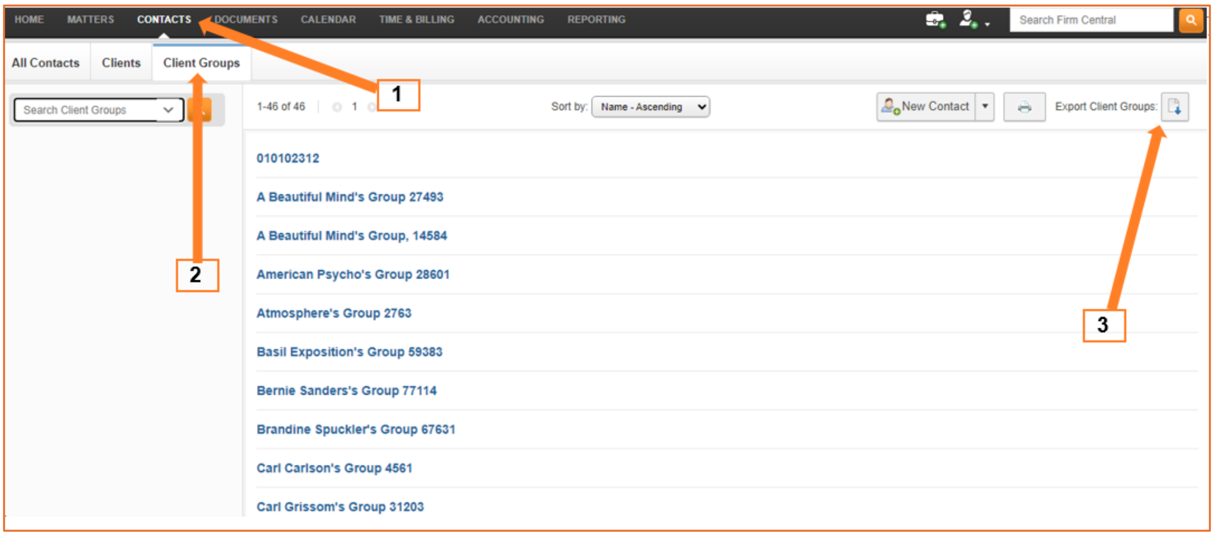
To export the client and contact list:

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:

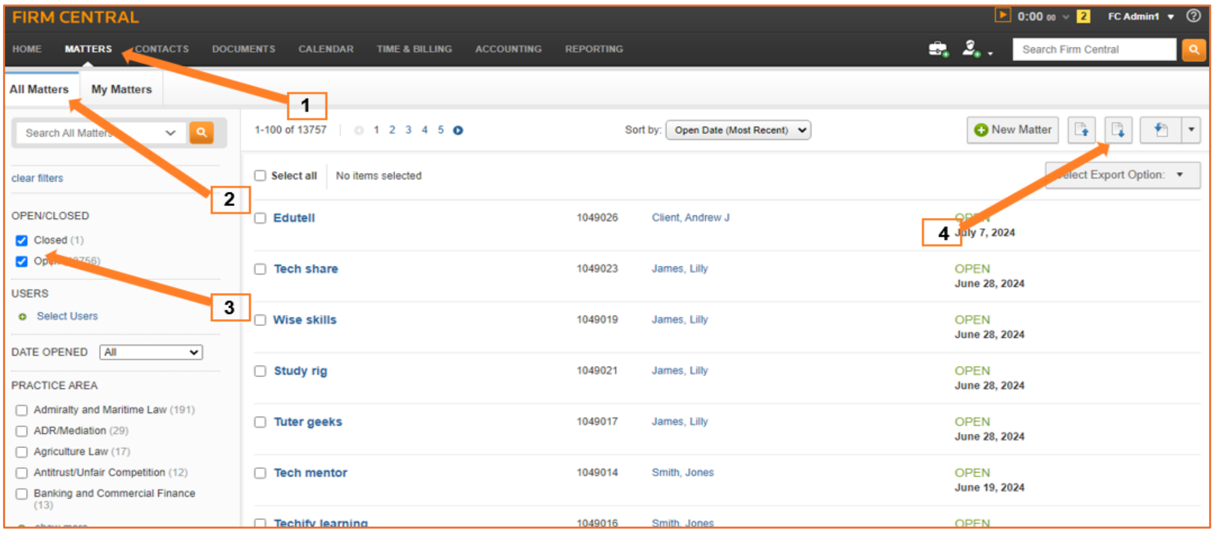
1. Select “CONTACTS” from the main menu.
2. Then select the Client Groups tab.
3. Click on Export Client Groups icon. This will begin to export all the Client Groups in a .CSV file.



Exporting Matters

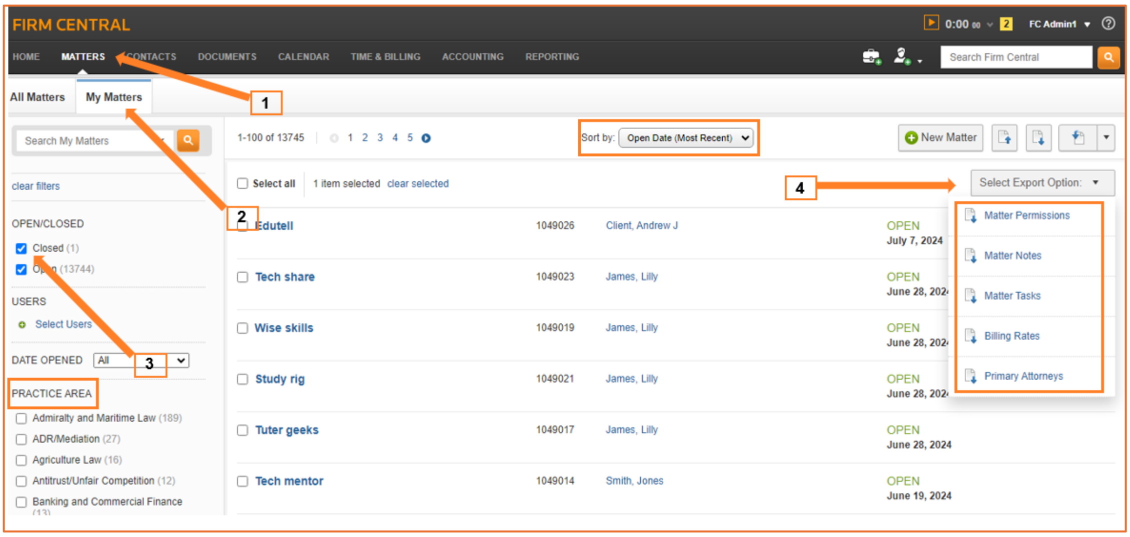
To export Matters list:

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

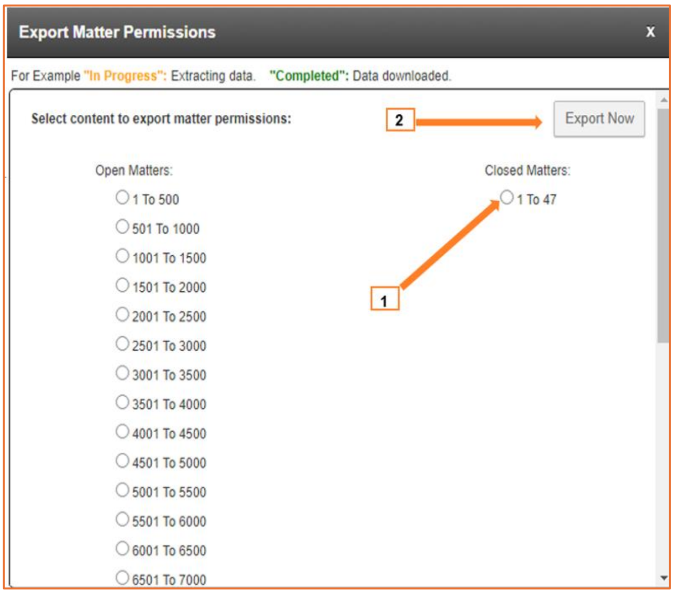
1. Select “MATTERS” from the main menu.
2. Then select All Matters or My Matters.
3. Make sure both Open matters and Closed matters are selected.
4. Click on Select Export Option.
5. Drop down menu contains Matter Permissions, Matter Notes, Matter Tasks, Billing Rates, Primary Attorneys.
6. You can filter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



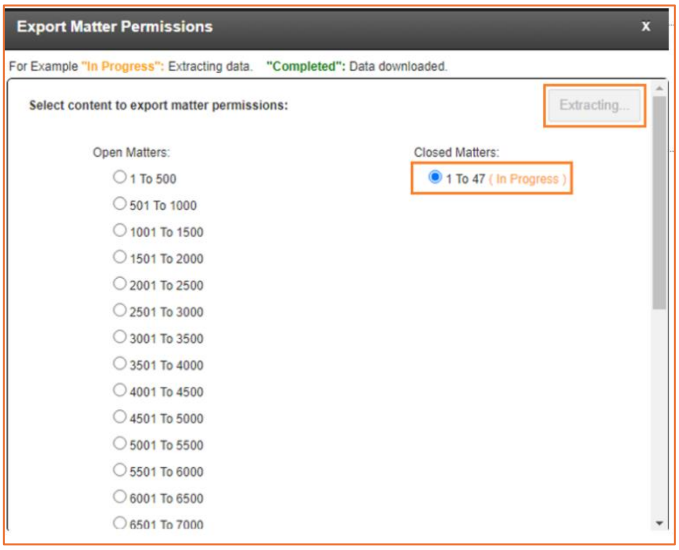
From Export Matter Permissions:

“Matter Permissions” will download the list of Matter Permissions as .CSV file.

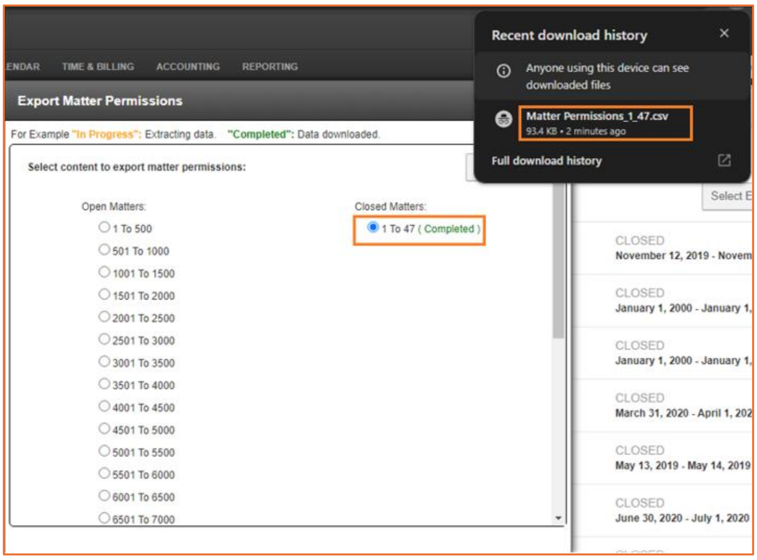
1. Click on any radio button to Export Open or Closed Matters as shown below.
2. Click on “Export Now”.



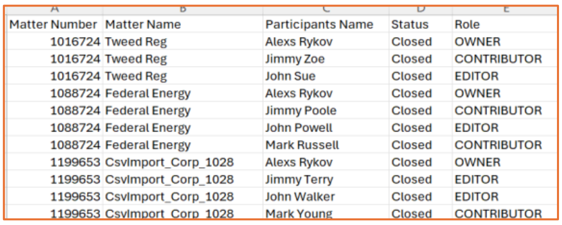
3. You can also see that the status of the matter will show “In Progress,” indicating that the selected matters are being Extracted.



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,
    a. Matter Number.
    b. Matter Name.
    c. Participants Name.
    d. Status of Matter.
    e. User Role of Matter Permissions.



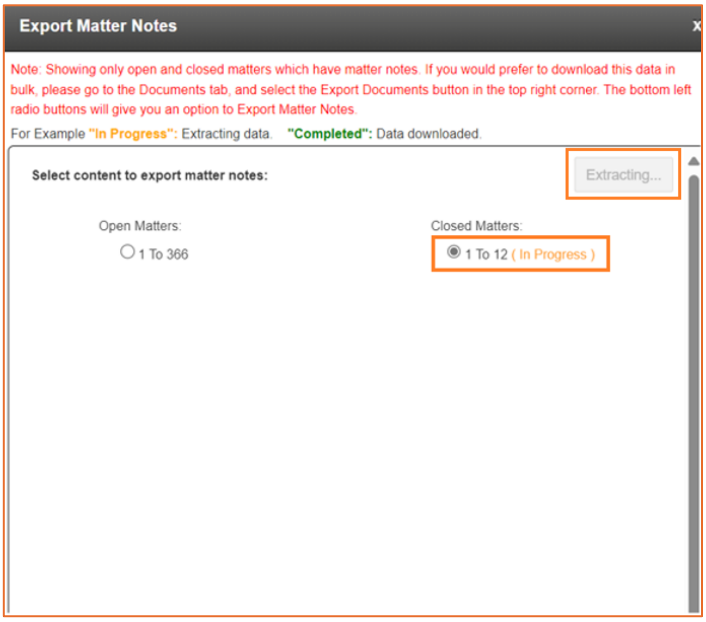
Matter Number	Matter Name	Participants Name	Status	Role
1016724	Tweed Reg	Alexs Rykov	Closed	OWNER
1016724	Tweed Reg	Jimmy Zoe	Closed	CONTRIBUTOR
1016724	Tweed Reg	John Sue	Closed	EDITOR
1088724	Federal Energy	Alexs Rykov	Closed	OWNER
1088724	Federal Energy	Jimmy Poole	Closed	CONTRIBUTOR
1088724	Federal 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:

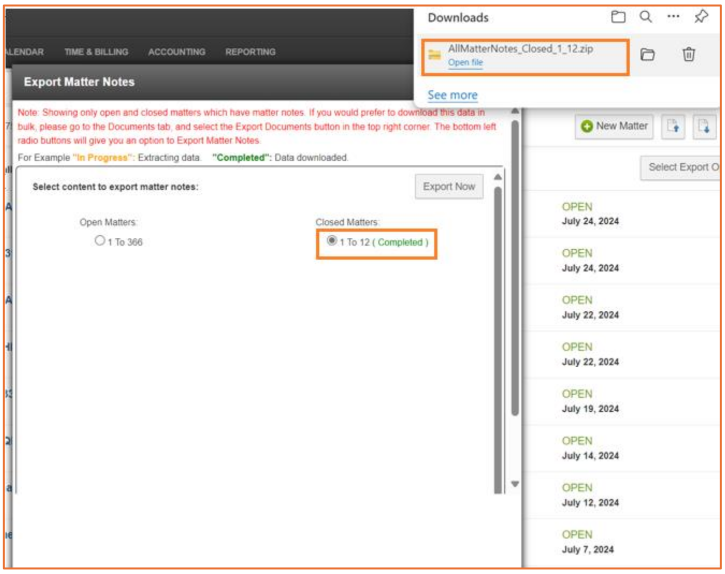
Export Matter Notes will download the list of existing Matter Notes that have been created. This will be saved as a .zip file.

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

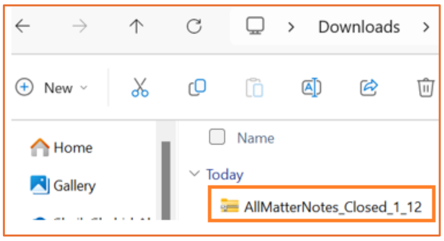
3. You can also see that the status of the export will show "In Progress," indicating that the selected notes are being Extracted.



4. As soon as the download is completed, the status will change to "Completed" and will be highlighted in green, indicating that the selected 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
    a. Count Number.
    b. Client Id.
    c. Matter Number.
    d. Matter Name.
    e. Matter Notes.
    f. Created By.
    g. Created Date and Time.

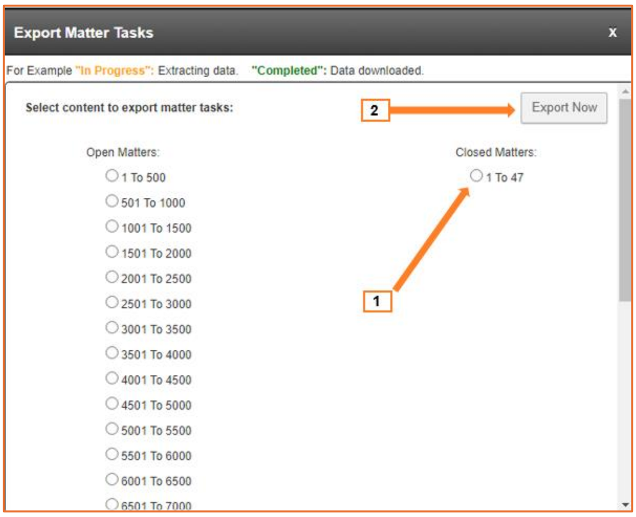
Note: You can also download Matter Notes in bulk, from “DOCUMENTS” menu. (see page 18)

A	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

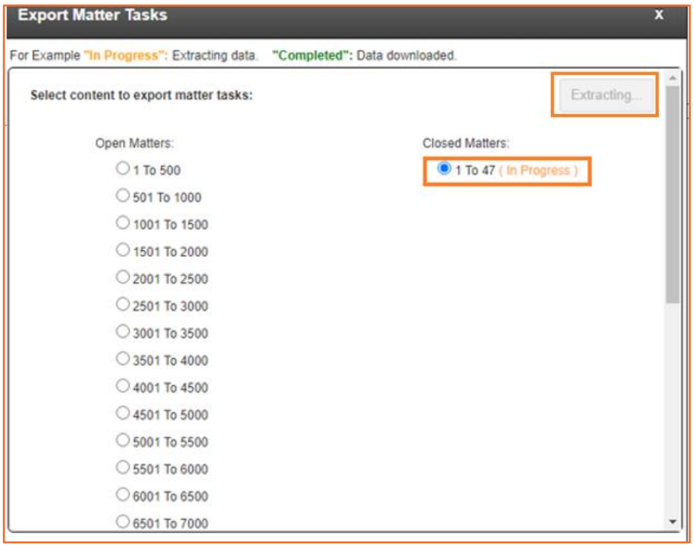
From Export Matter Tasks:

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

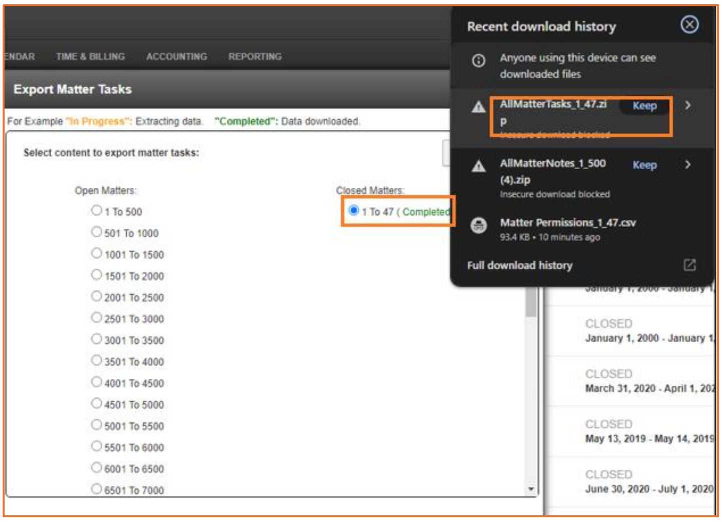
1. Click on any radio button to Export Open or Closed Matters.
2. Click on Export Now



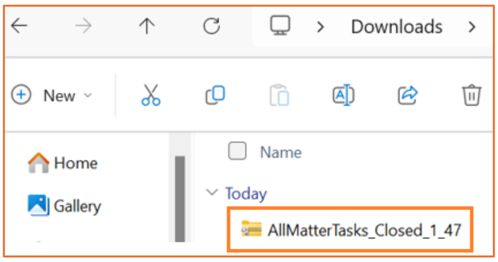
3. You can also see that the status of the matter will show "In Progress," indicating that the selected matters are being Extracted.



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.



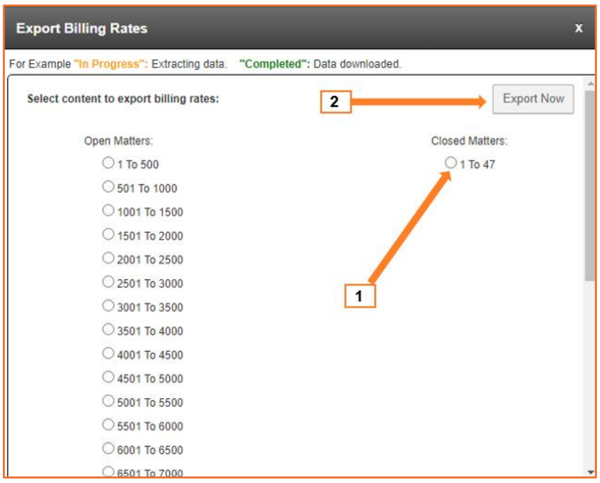
6. You will need to use a decompression utility to unzip these files.
7. The .zip file contains the files of Matter Tasks in a .CSV file,
8. The .CSV file contains:
   a. Count Number.
   b. Matter Number.
   c. Title.
   d. Matter Name
   e. Assigned Date.
   f. Client Name.
   g. Create By Name.
 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

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

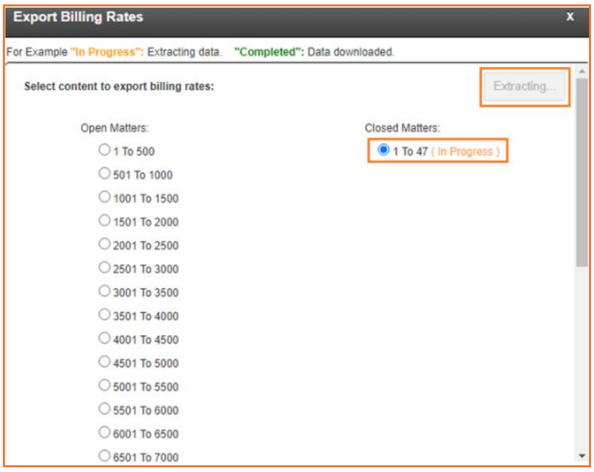
From Export Billing Rates:

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

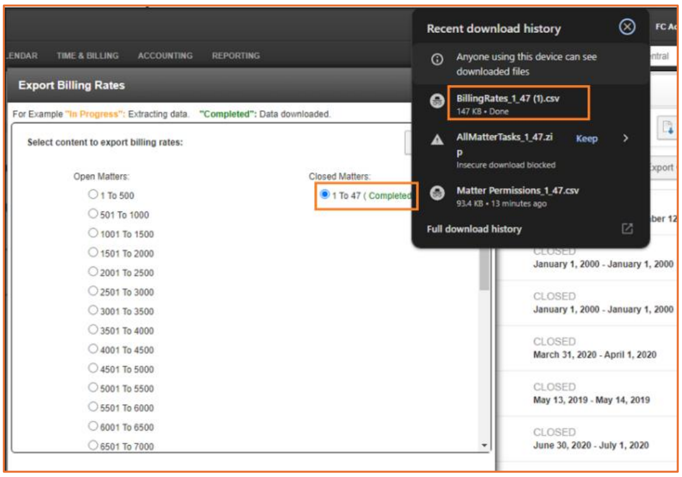
1. Click on any radio button to Export Open or Closed Matters.
2. Click on Export Now.



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



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.



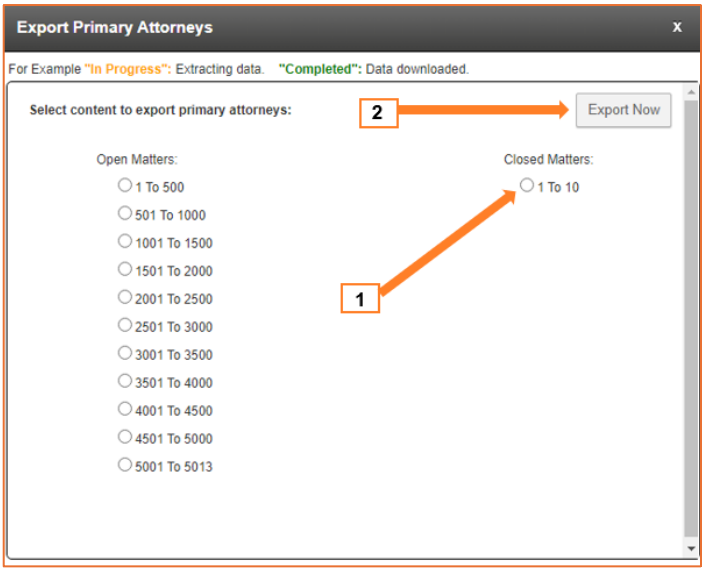
6. The .CSV file contains:
   a. Matter Number.
   f. Matter Name.
   g. Matter Status (Open or Closed).
   h. User Id.
   i. Colleague.
   j. User Role of Matter Permissions.
   k. Matter Rate Value.
   l. User Rate Value.
   m. Client Rate Value.

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

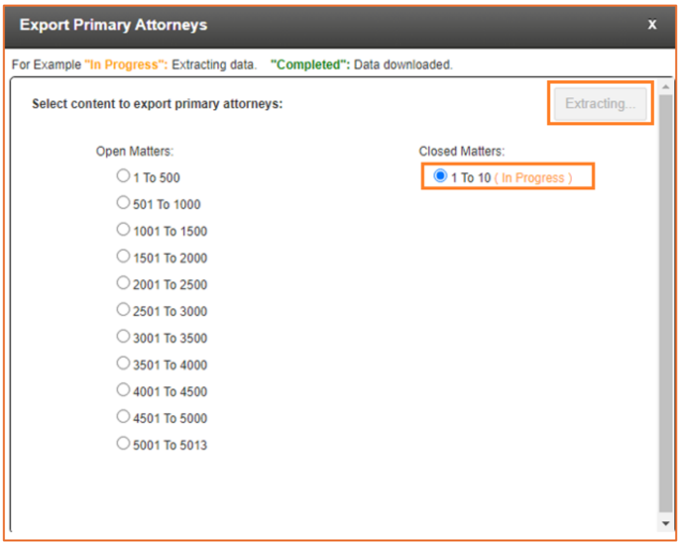
From Export Primary Attorneys:

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

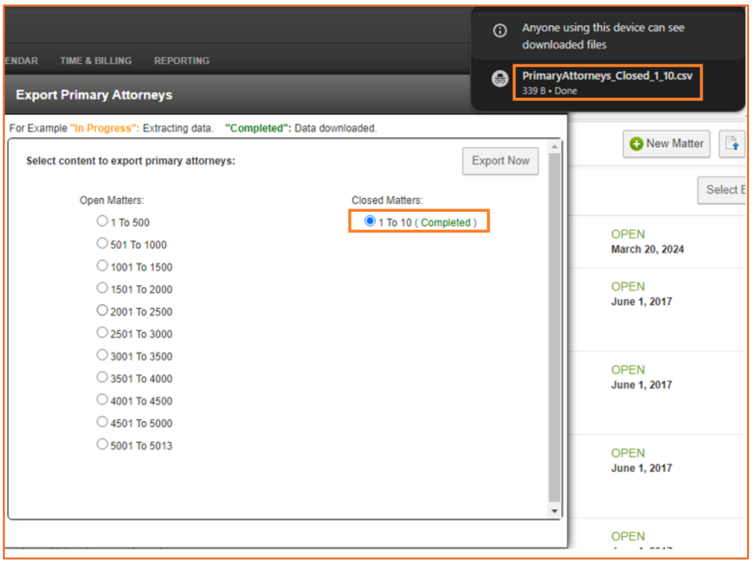
1. Click on any radio button to Export Open or Closed Matters.
2. Click on Export Now.



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 “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.



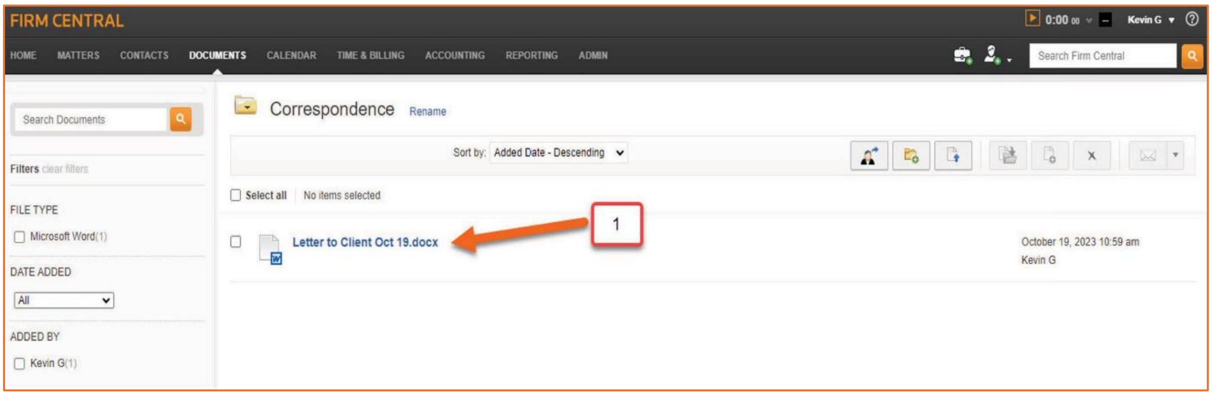
6. The .CSV file contains,
   a. Matter Number.
   b. Matter Name.
   c. Originating Attorney.
   d. Lead Attorney.

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

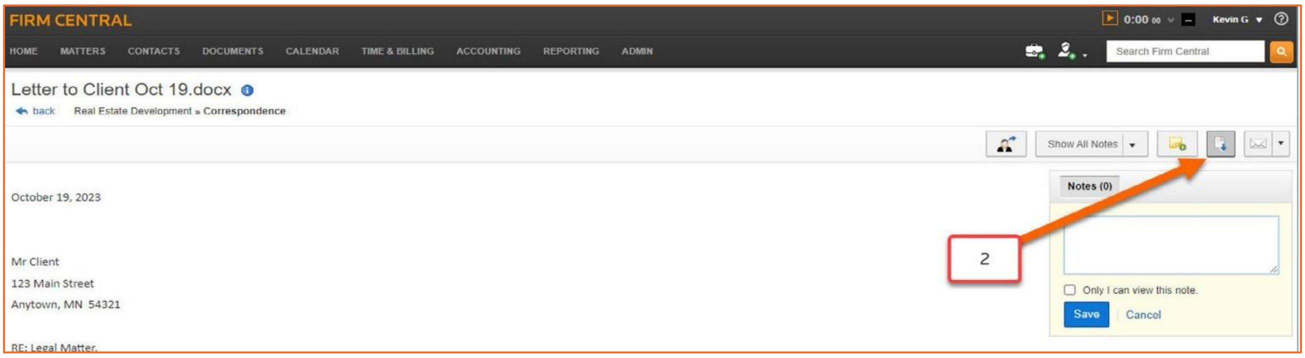
Exporting Documents

Download a single document from a matter in Firm Central:

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



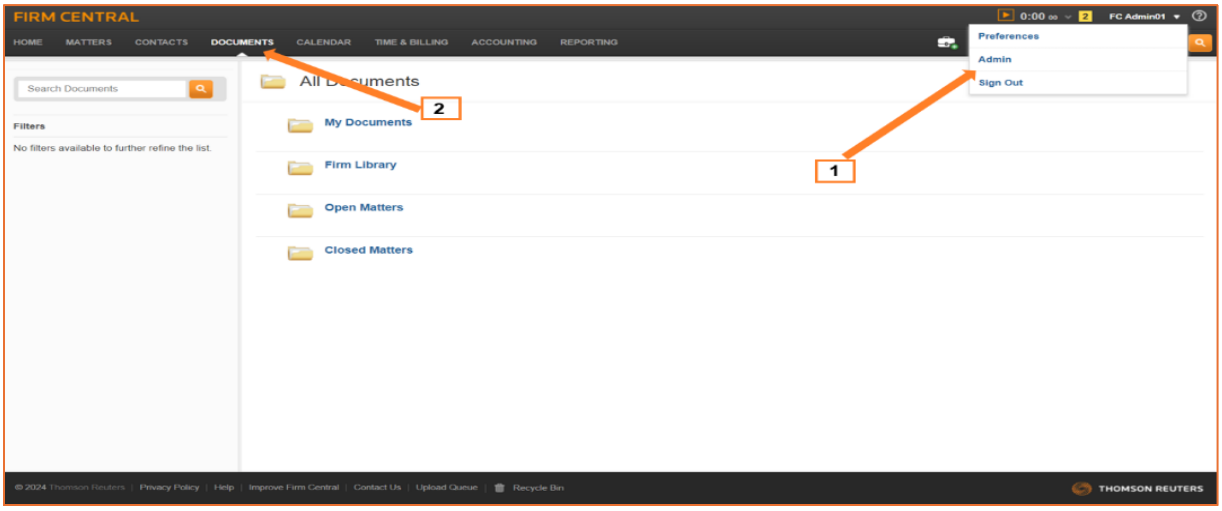
2. In the upper right corner click on the Export icon. Your document will be downloaded in its original format.



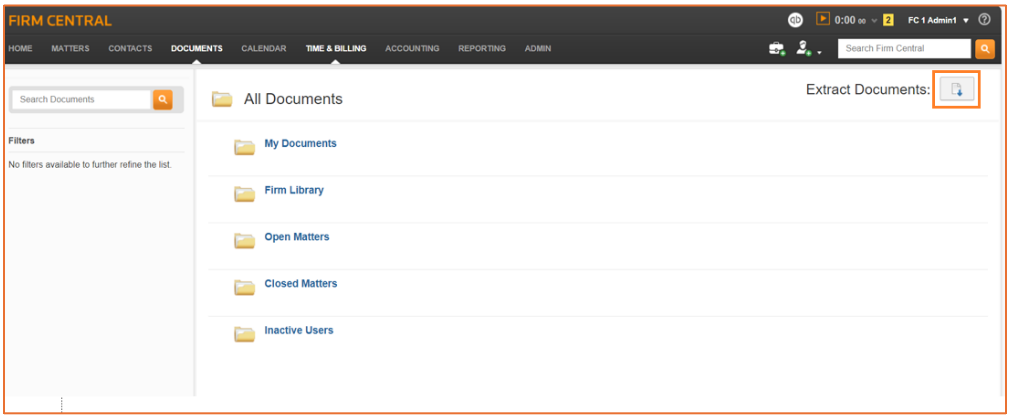
Download Bulk Documents in Firm Central

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.

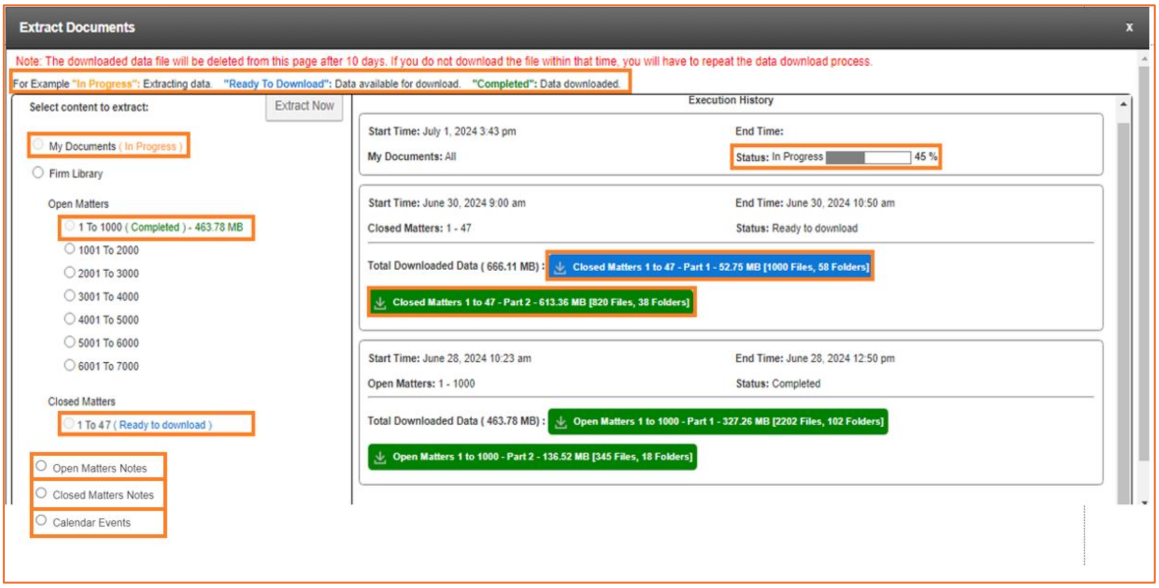


5. After selecting the “Extract Documents” icon, a dialog box will open, allowing you to select the matters from the “Select Content to Extract” section to download documents.
    a. My Documents: This will download the My Documents content from all users.
    b. Firm Library: This will download all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

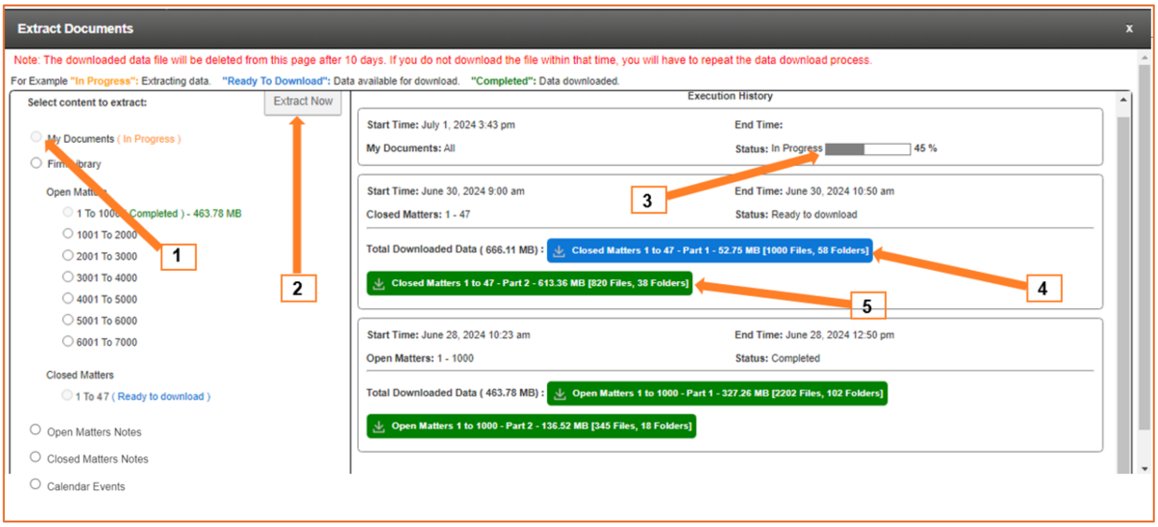


Download bulk Documents:

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.

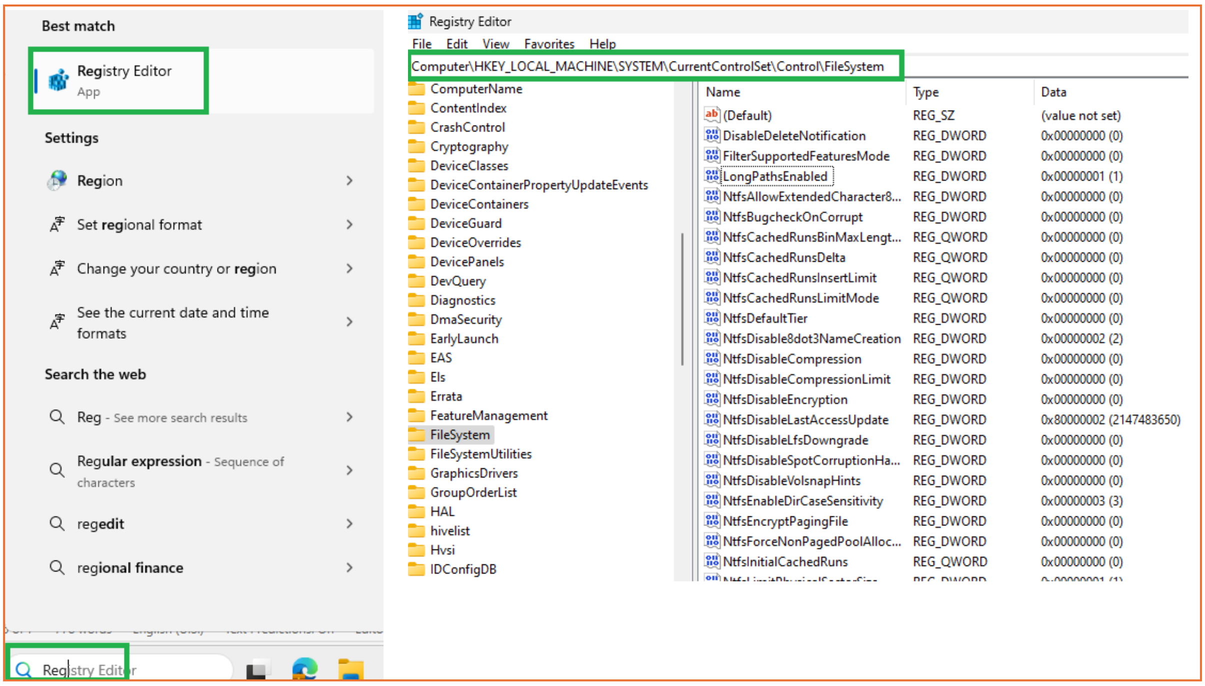


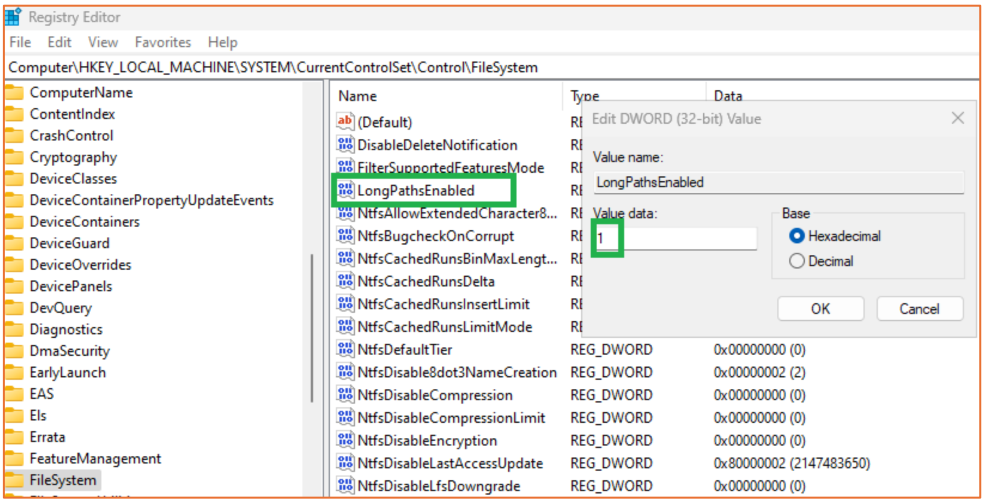
9. The data will be in the form of zipped bundle files. You will need to use a decompression utility to unzip these files.

   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.

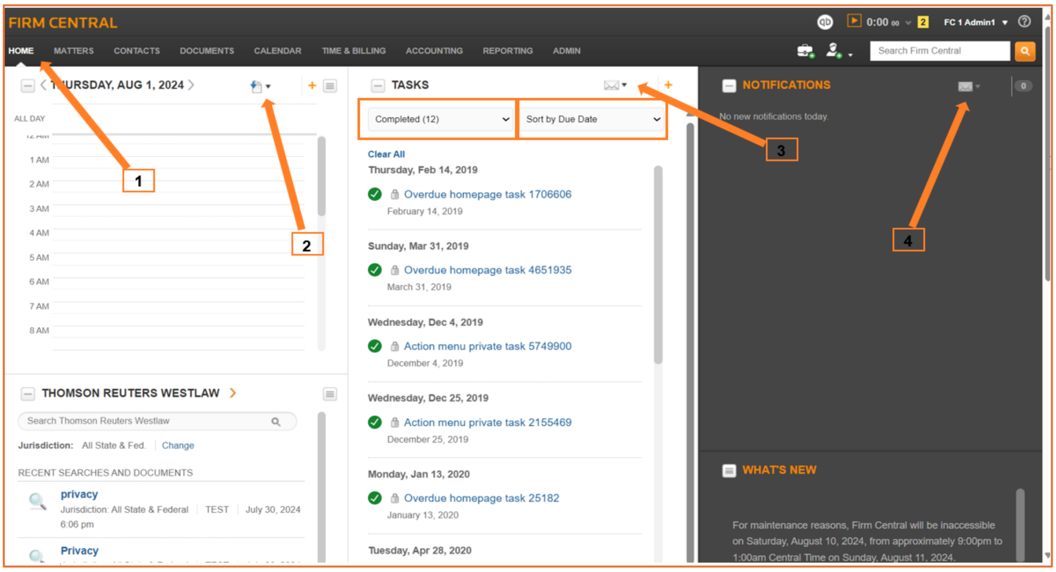
Note: Links contained in Matter folders to Westlaw research documents will not download the full Westlaw documents. You will be able to go to your Firm Central folders within Westlaw to get those documents.

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.

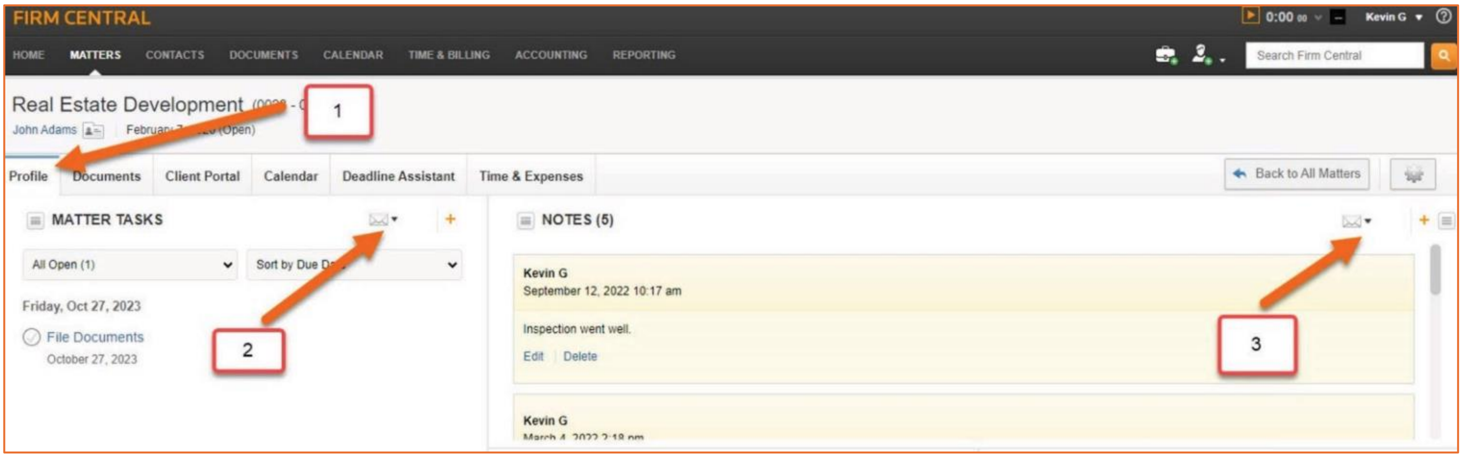


Export data from within a specific Matter.

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.

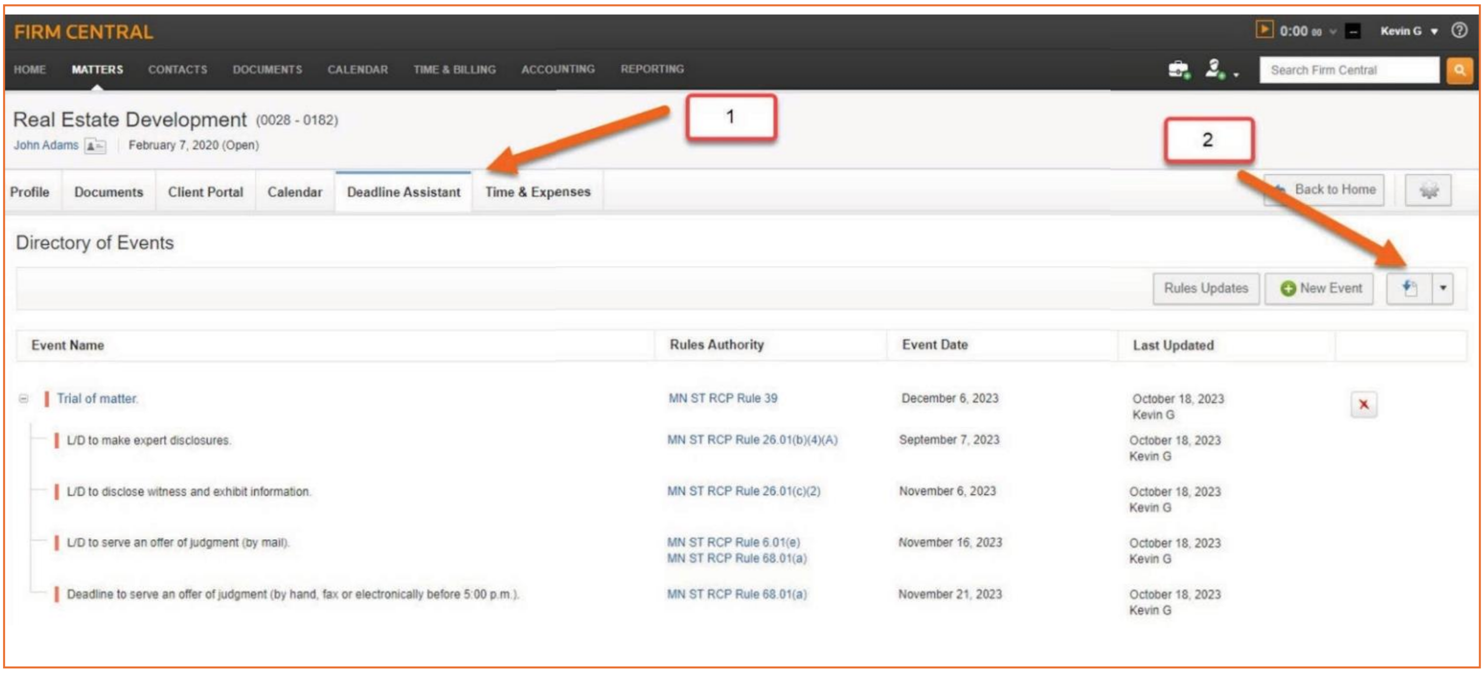
From the Calendar Tab:

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:

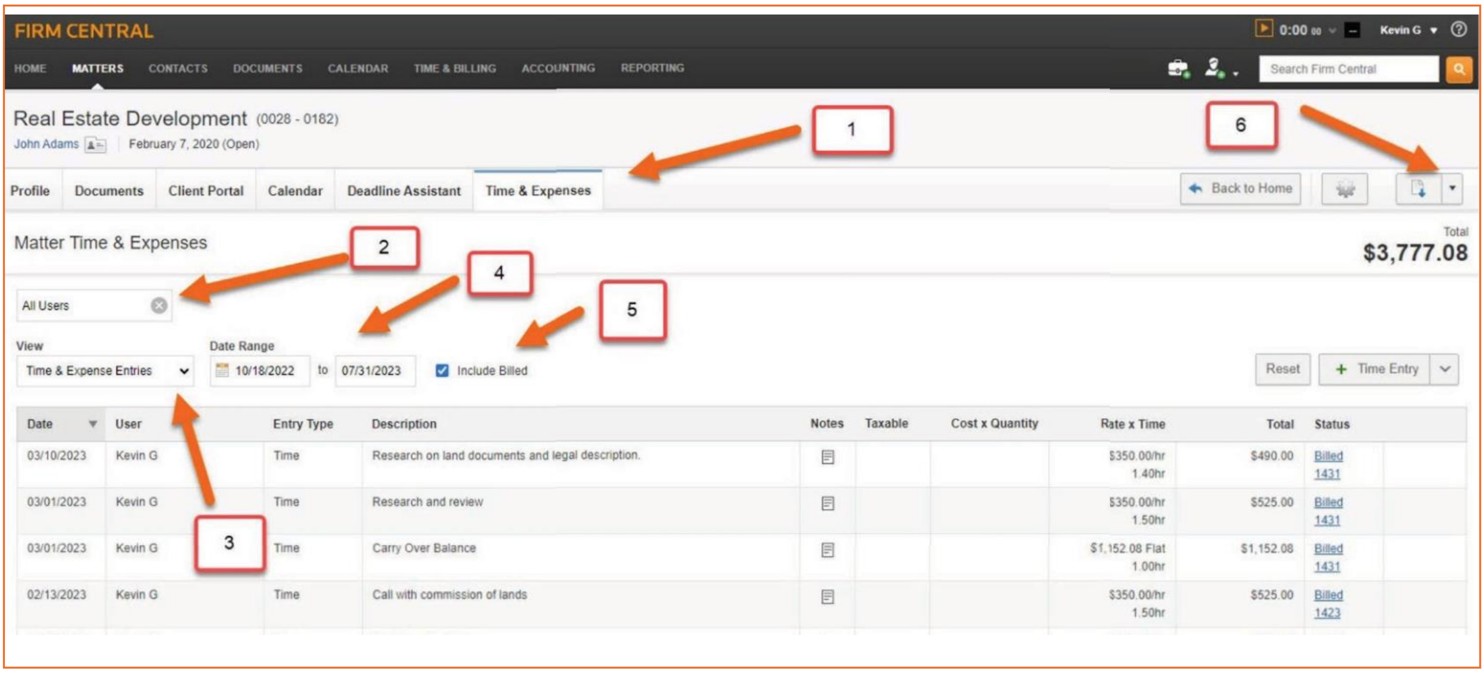
1. Select the “Deadline Assistant” tab within the Matter.
2. Click on the Export icon or down arrow and select the date range and file type to download.



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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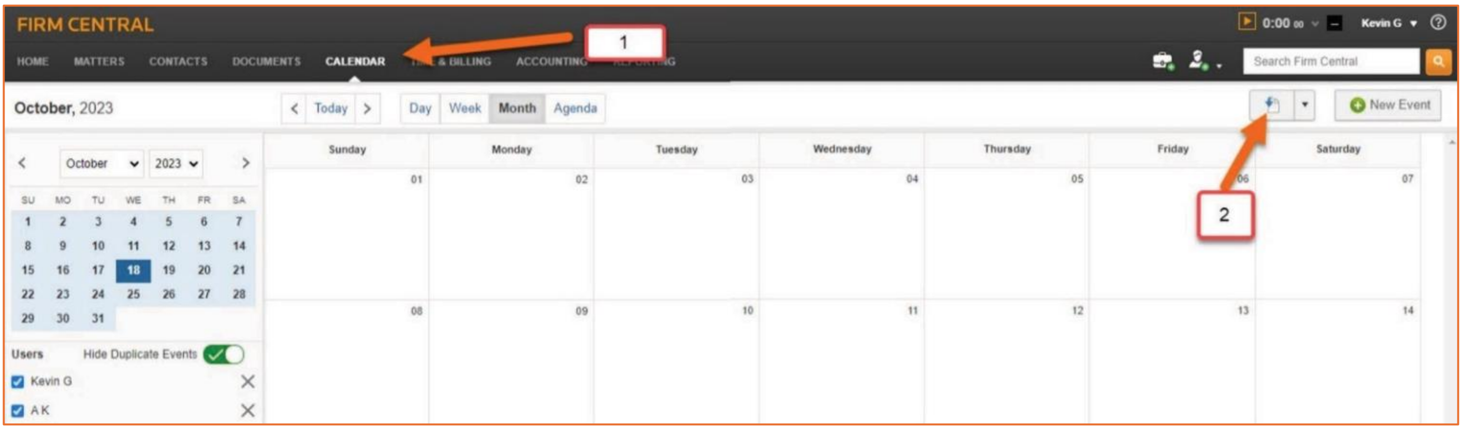
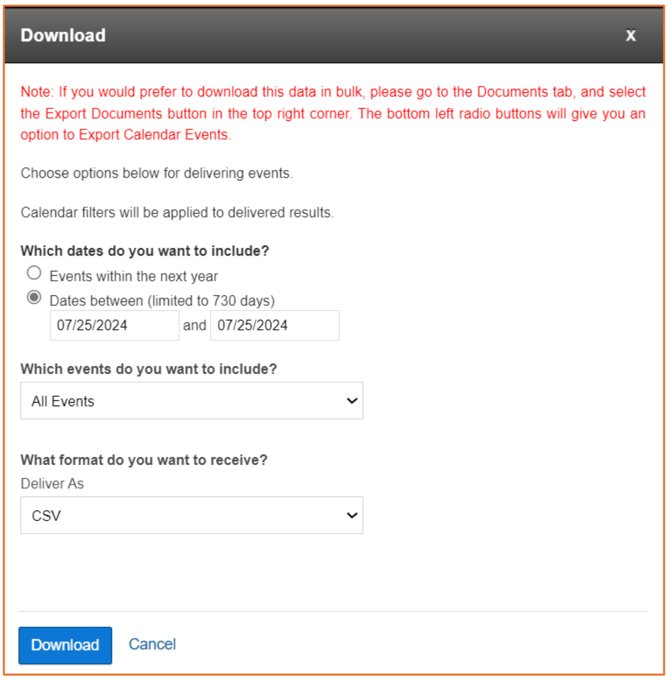
Exporting Calendar Events

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.



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.

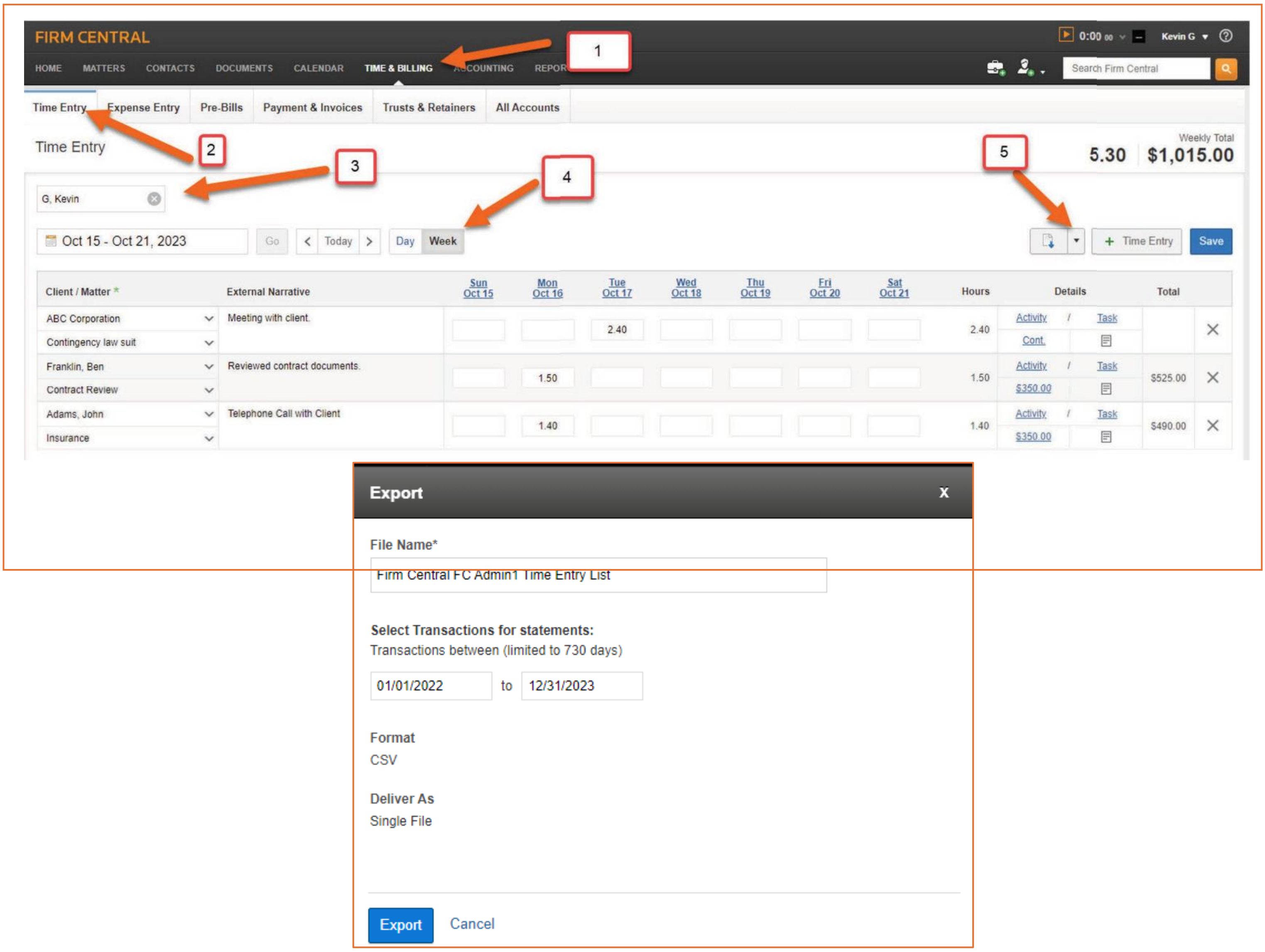
Time & Billing

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.

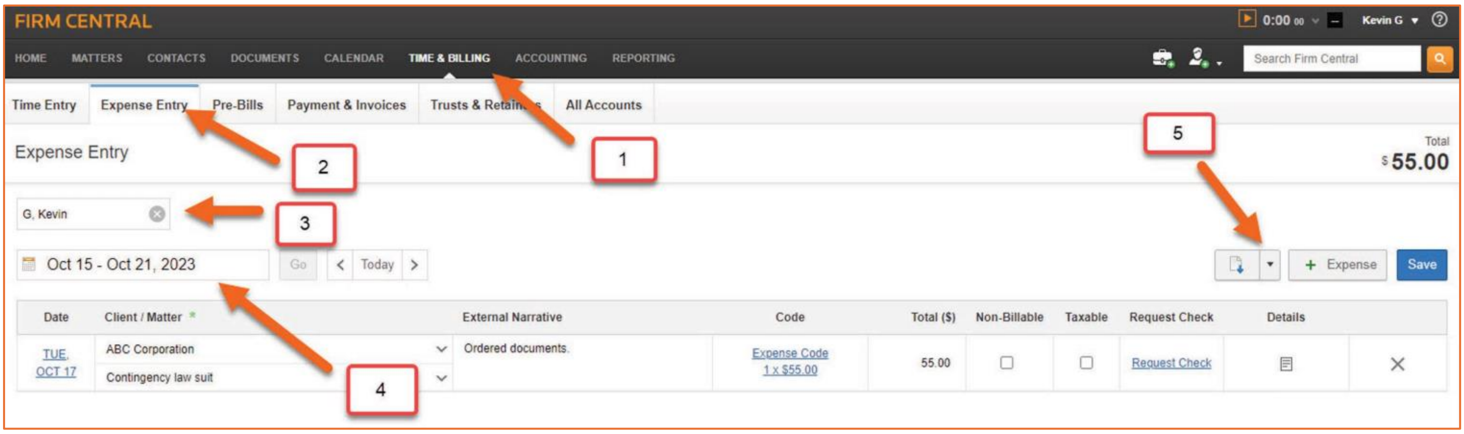


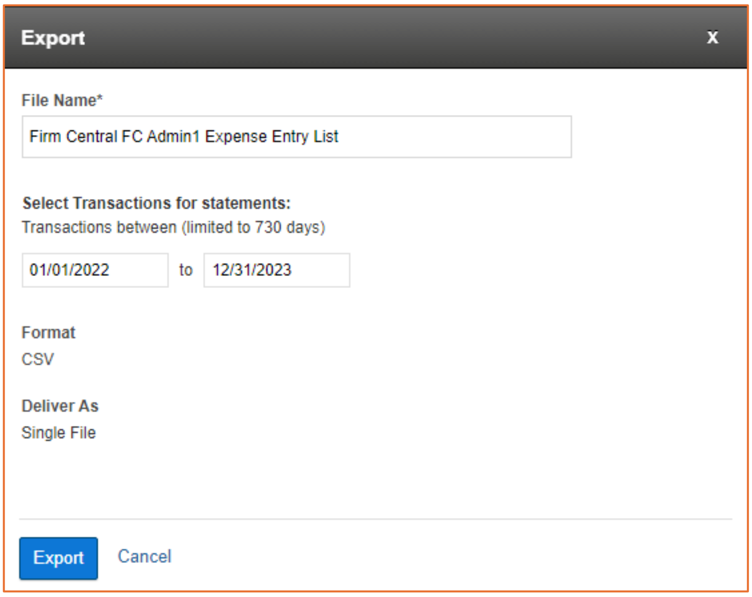
Expense Entry Tab:

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.

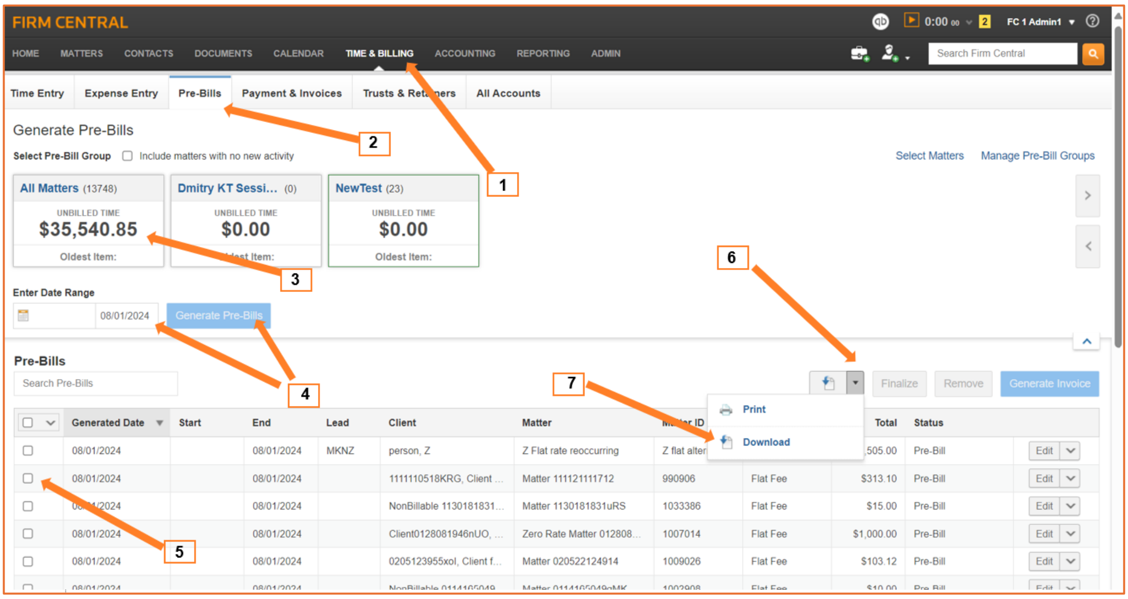




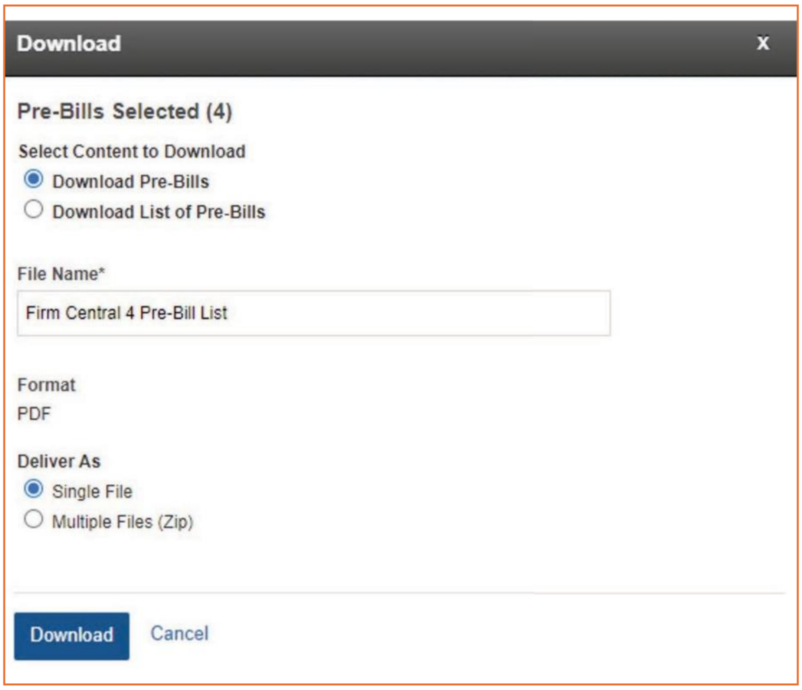
Pre-Bills Tab:

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”.



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.



Payment and Invoices Tab:

To download invoices, follow these steps:

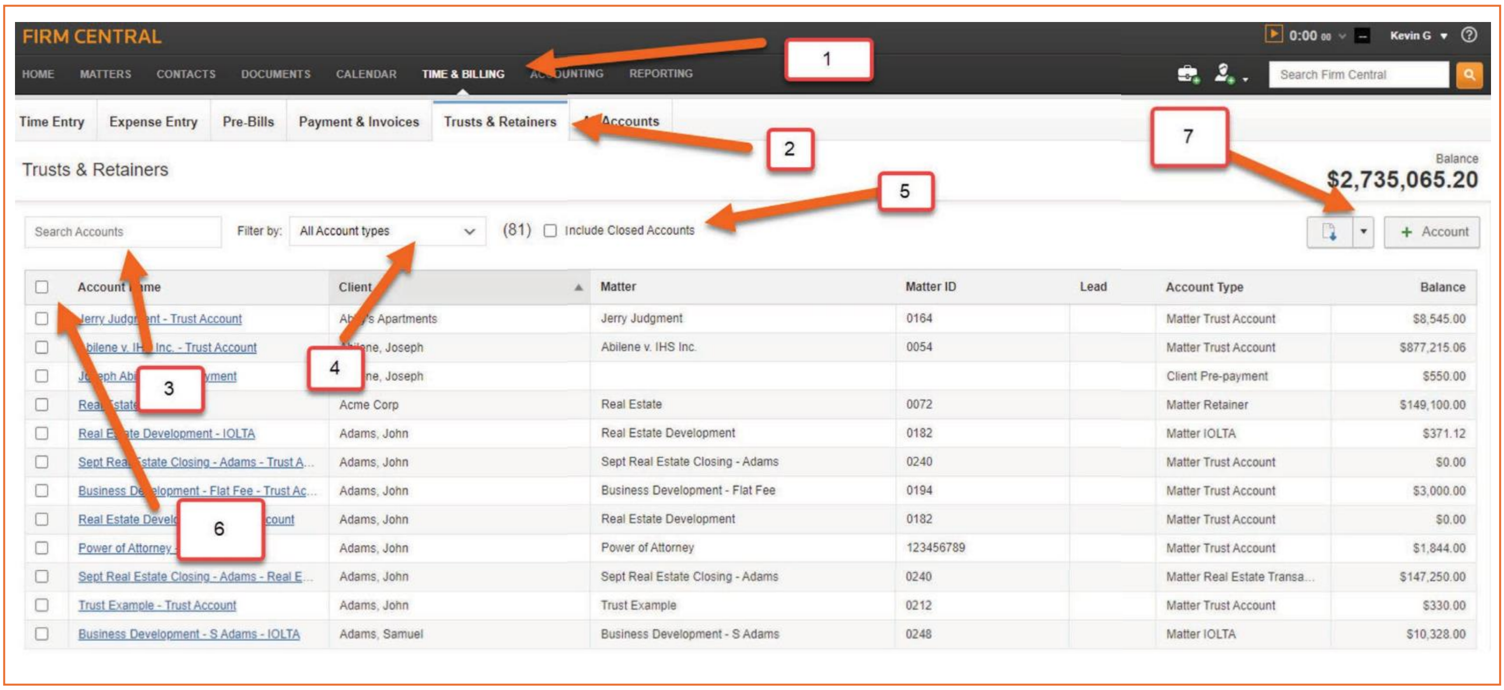
1. Select the “TIME & BILLING” Tab from the main menu.
2. Select the “Payment & Invoices” Tab.

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.

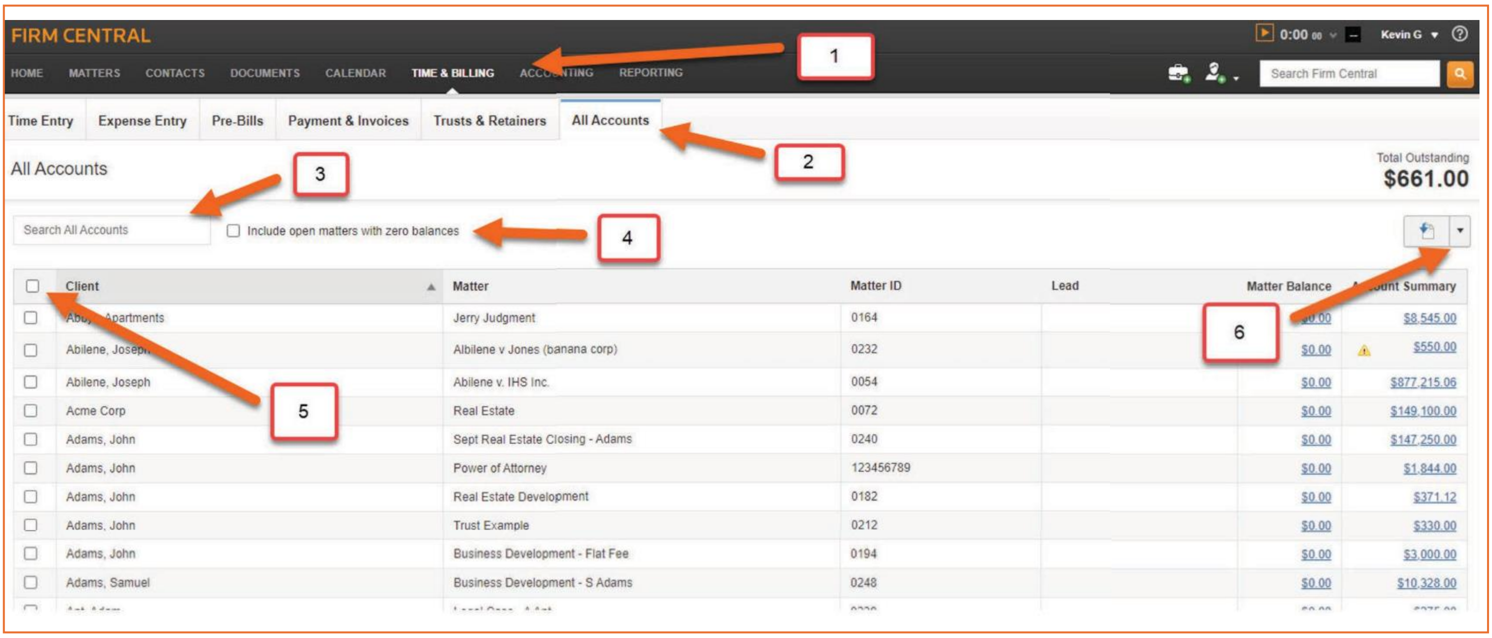


All Accounts Tab:

“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

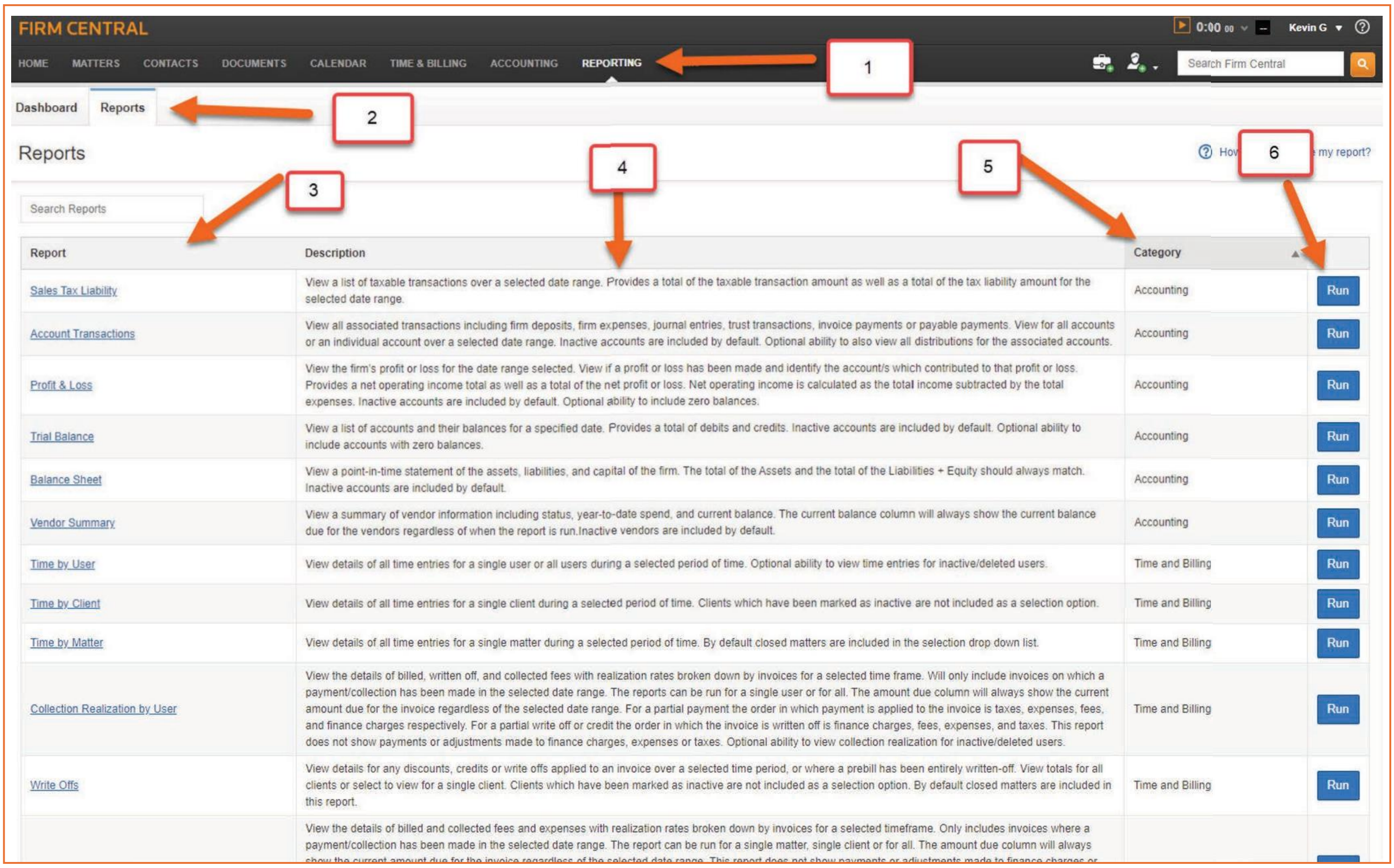
down arrow provides you with options to Print, Download, and Export. The Download option gives the choice of a PDF or ZIP file (it will download as a ZIP file if multiple accounts are selected) and an Export option as a .CSV file.



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.

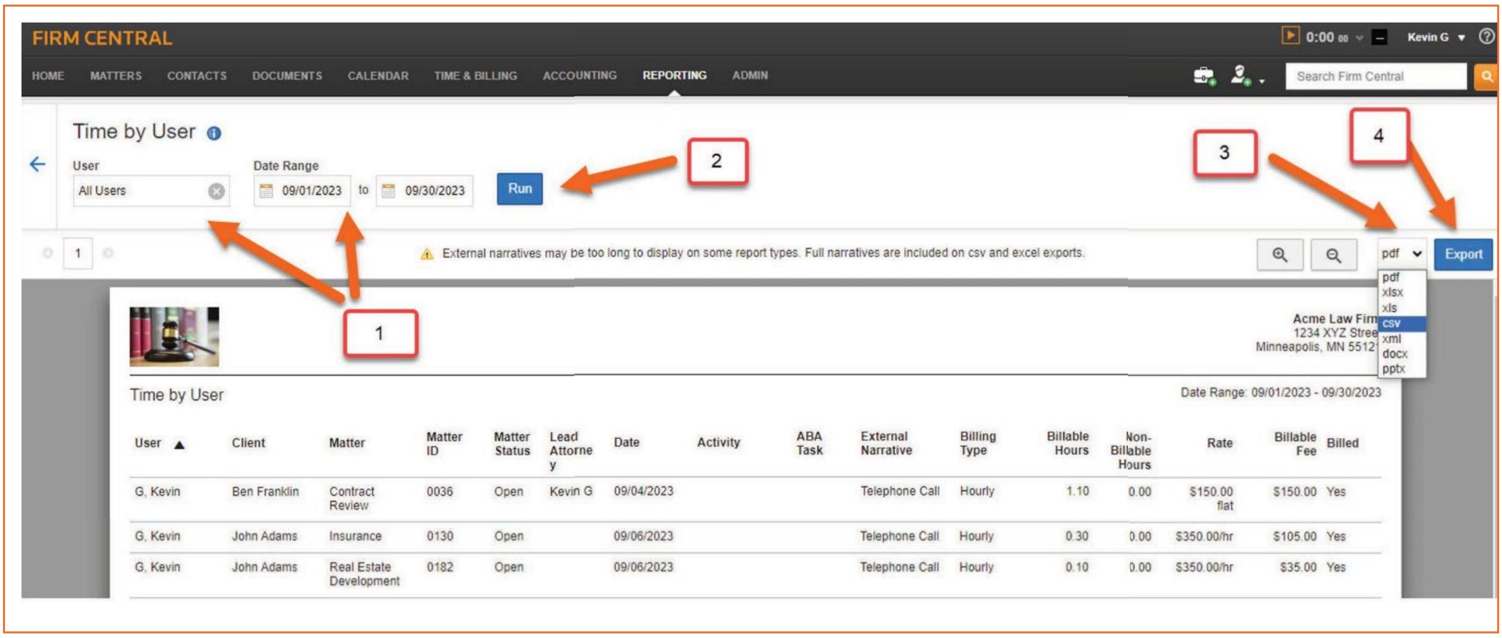
1. Select “REPORTING” from the main menu.
2. Select the “Reports” Tab.
3. On the left side of the page, you will see the report titles.
4. In the center of the page, you will see the description of each report.
5. The Category column shows the category of the report. Customers with Firm Central Accounting 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.



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.



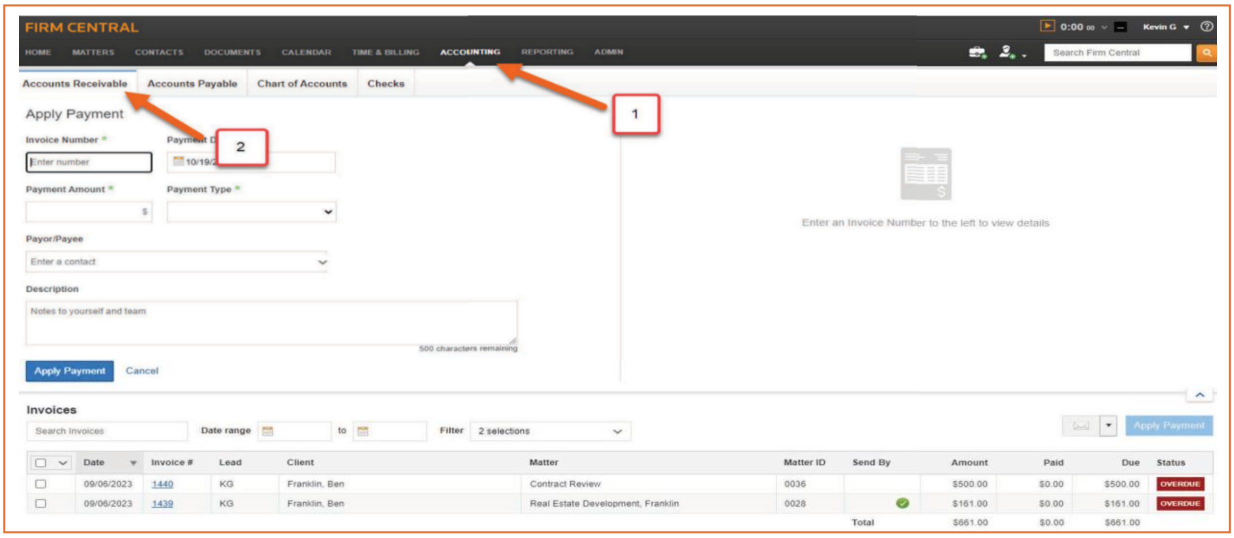
Accounting

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"

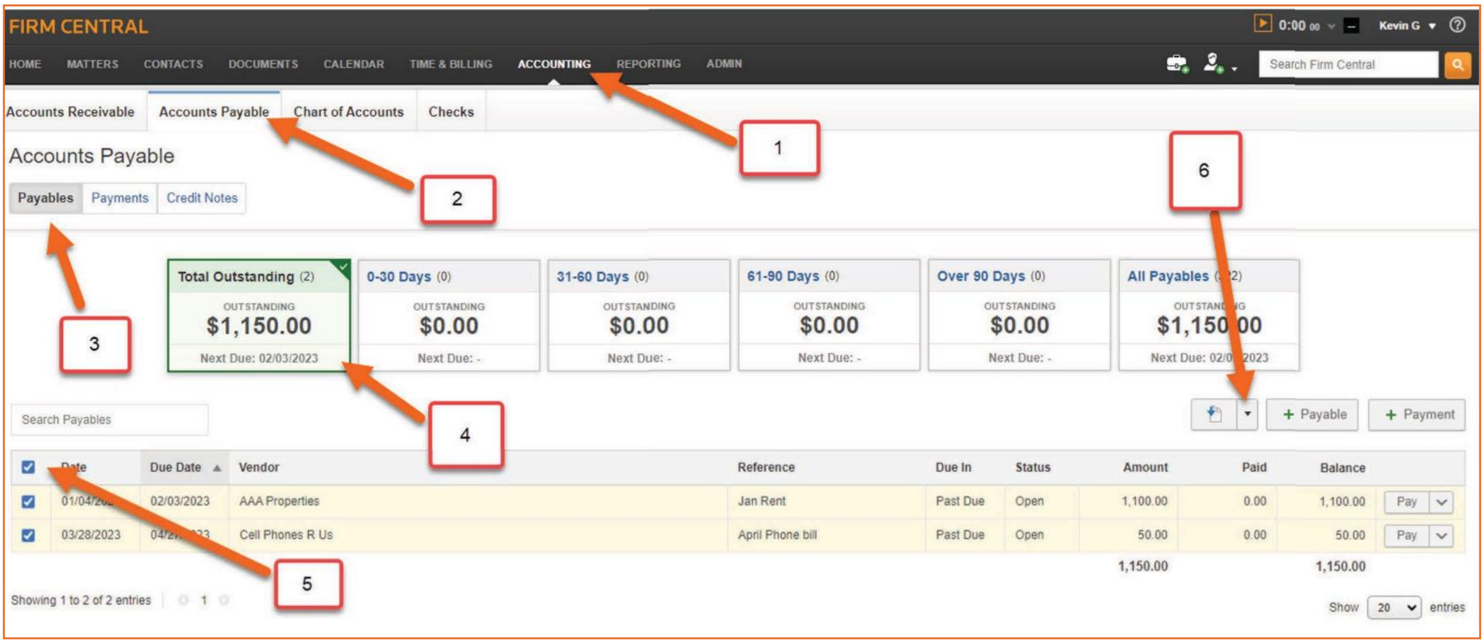
1. Select "ACCOUNTING" from the main menu.
2. Select the "Accounts Receivable" Tab. (See page 27 and follow the same steps in the Payment & Invoices section to download Accounts Receivable).



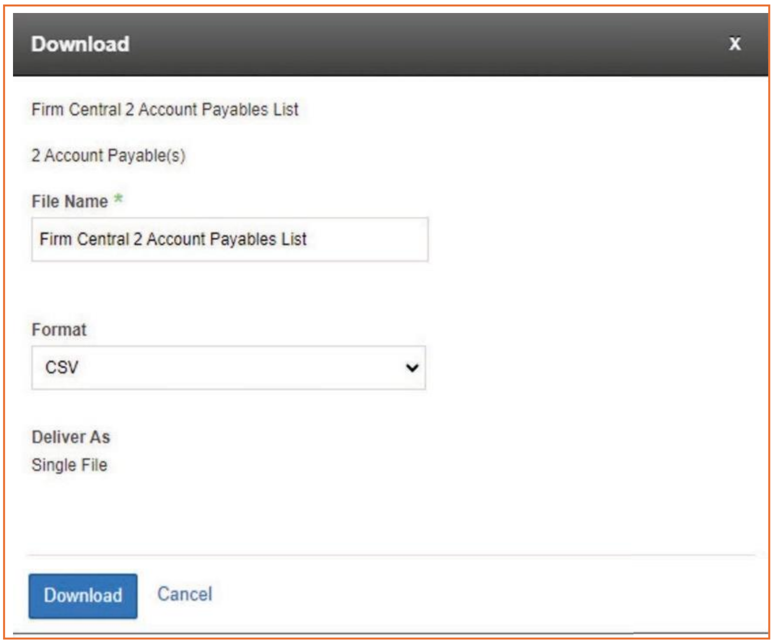
Accounts Payable Tab:

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.



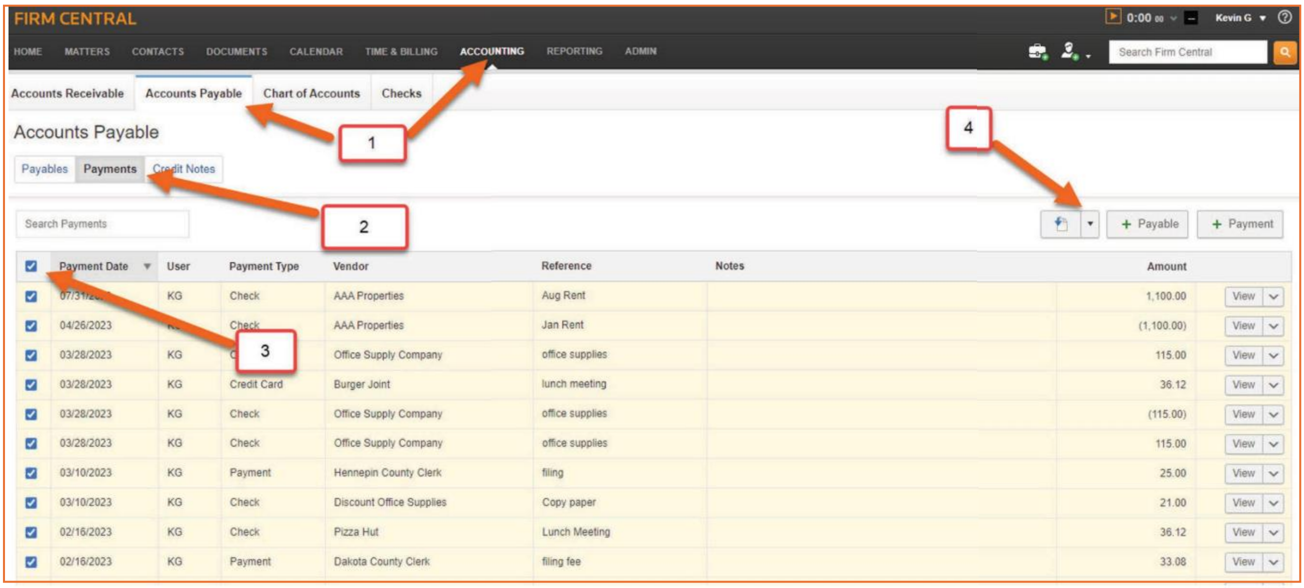
The next tab within “Accounts Payable” is the “Payments” Tab.

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.



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.

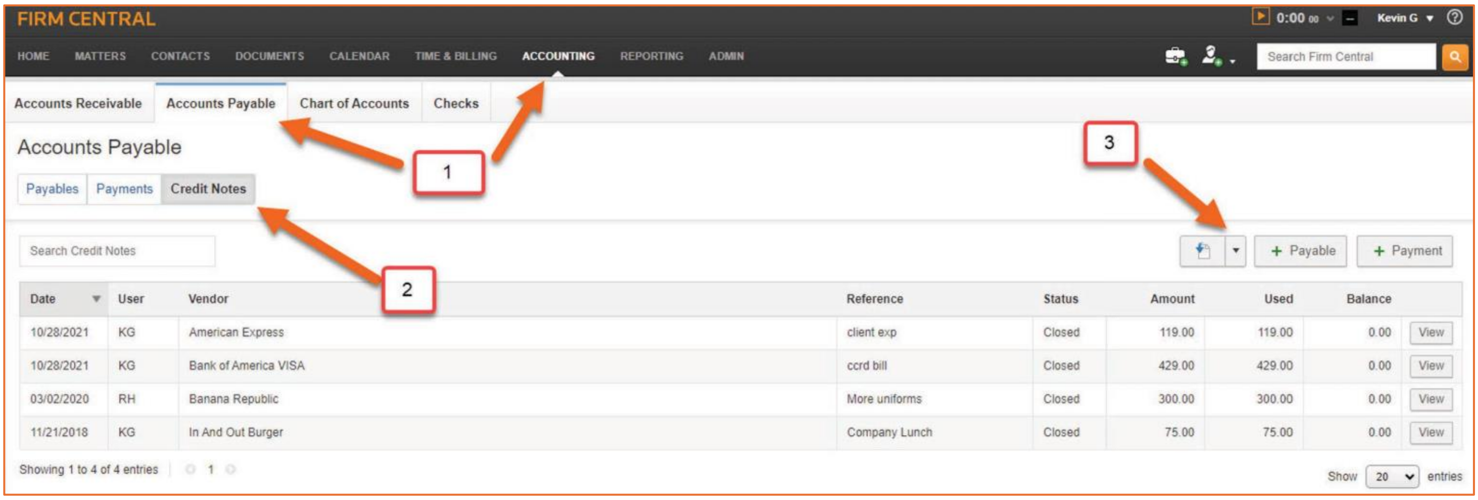
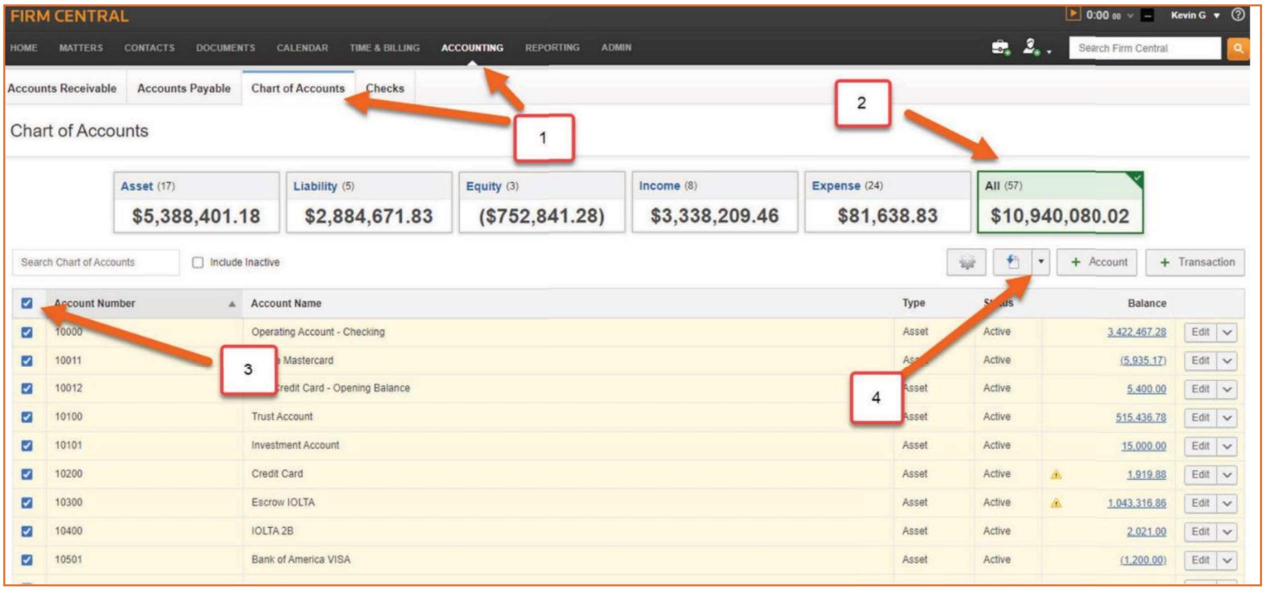


Chart of Accounts Tab:

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

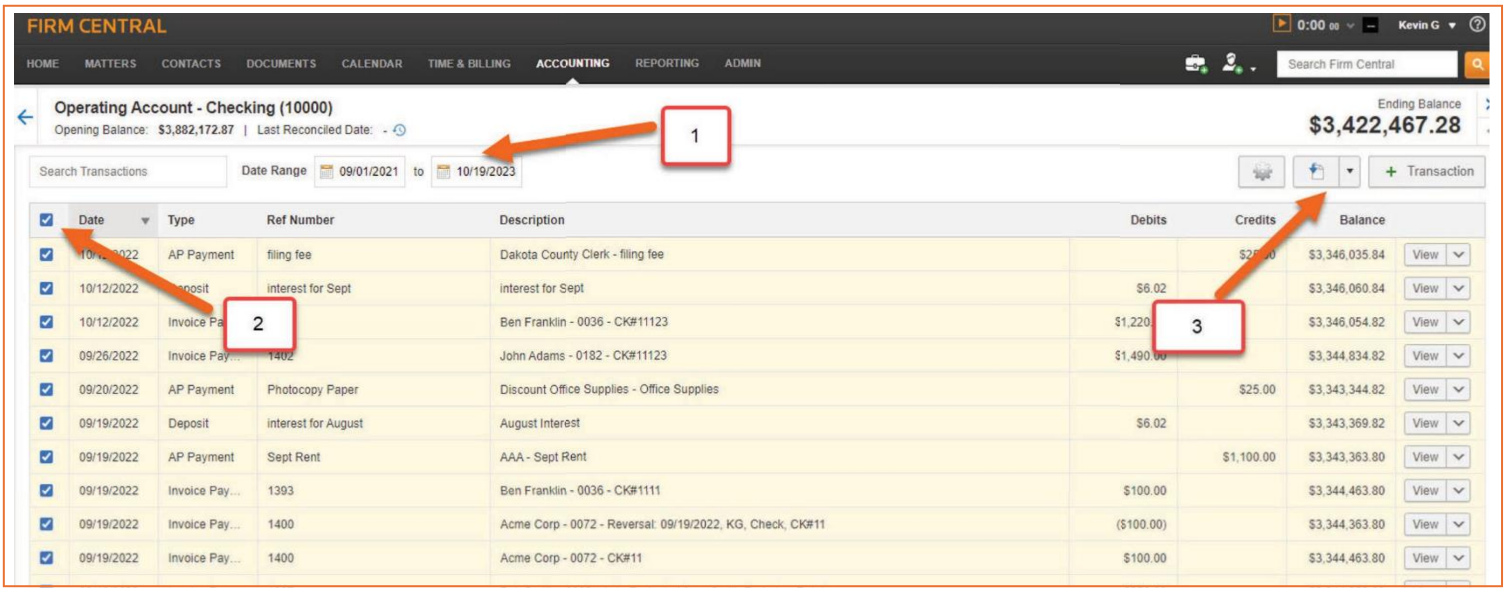
1. Select "ACCOUNTING" from the main menu and then select "Chart of Accounts".

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.



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.

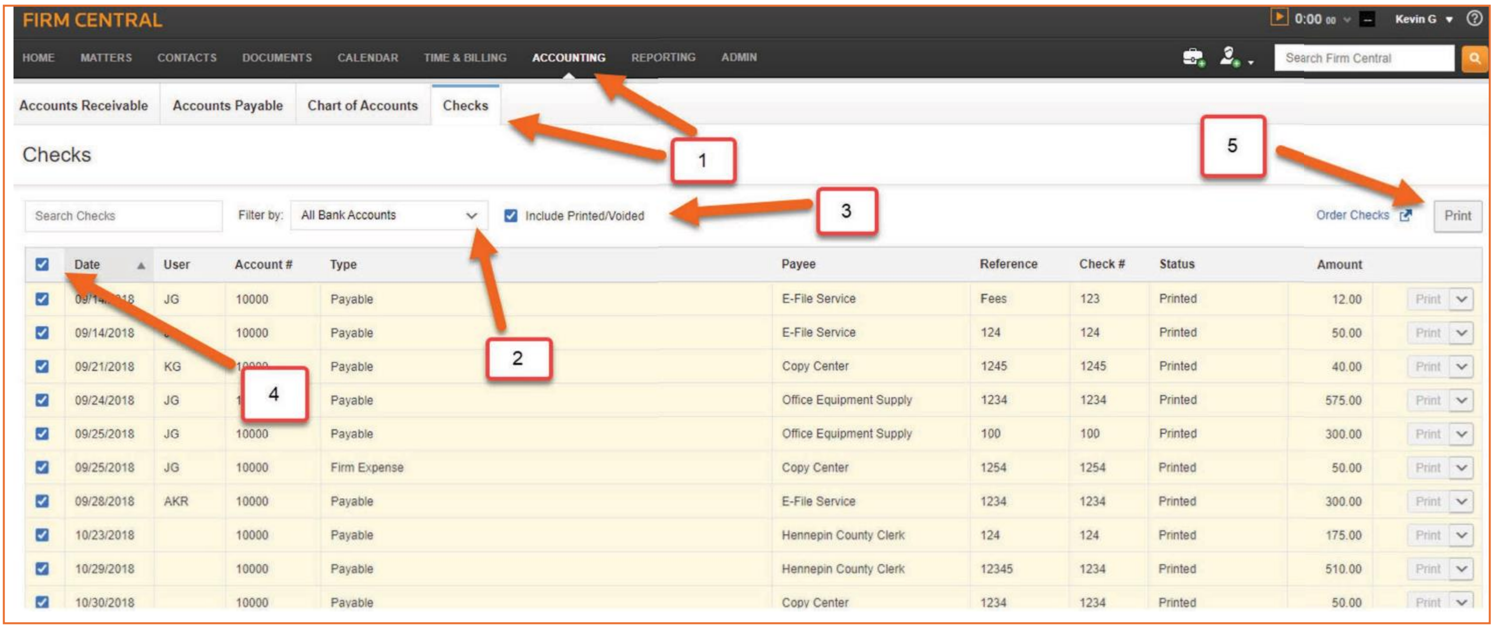
1. Begin by selecting your date range.
2. Click the "Select All" box on the far left on the page.
3. Click on the Export icon or down arrow to begin the download. Like the "Payables" and "Payments" download, when selecting "Download" a pop-up window will appear, giving you the choice to rename the file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



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.



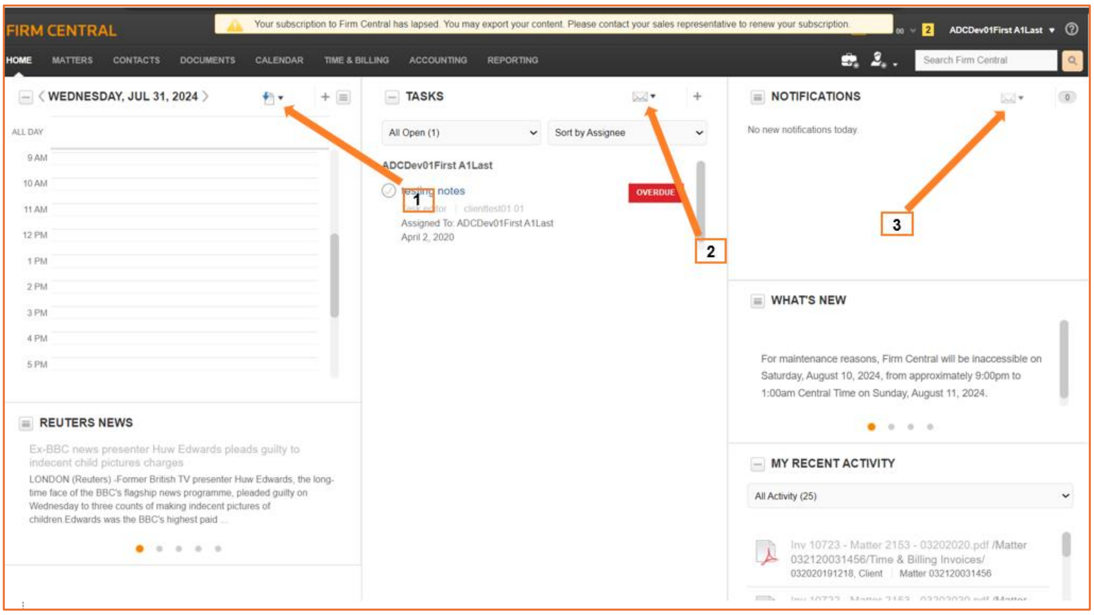
Exporting data from a lapsed Firm Central subscription

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:

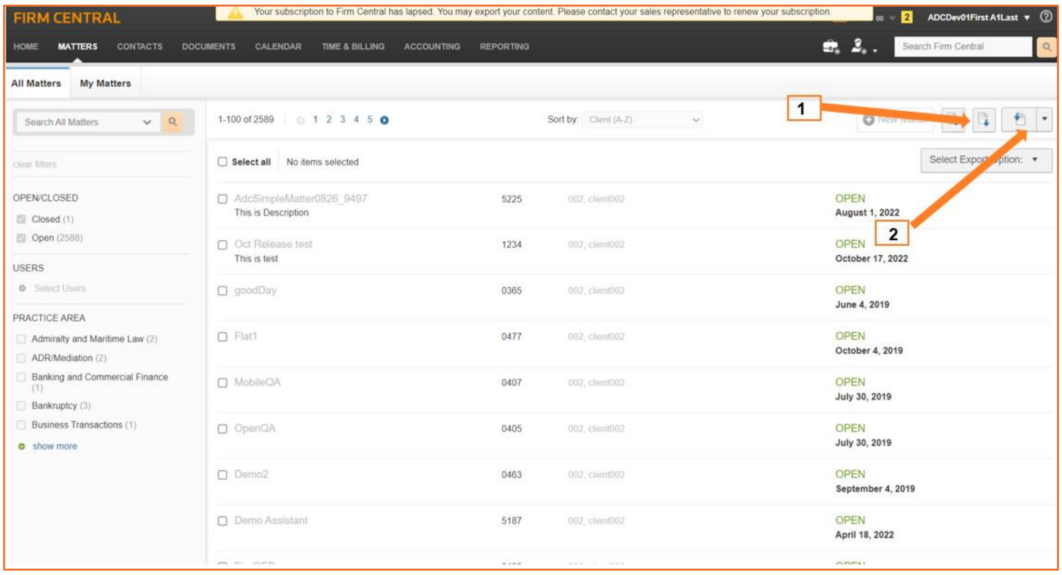
1. The Calendar. Remember, this Calendar Widget is only a one-day snapshot. The export option will be grayed-out if there is no data on the calendar. It is recommended to export data from the main Calendar Menu.
2. Tasks
3. Notifications

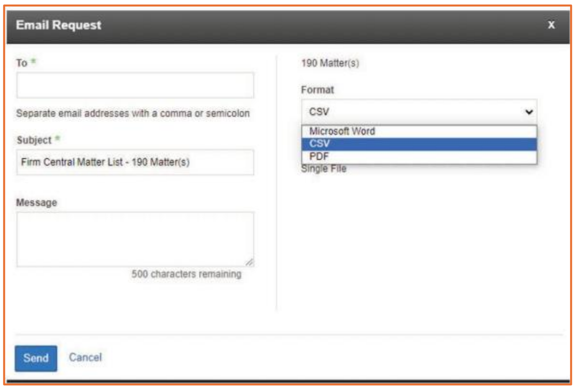


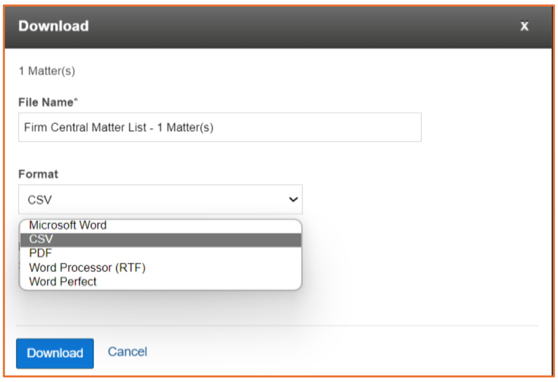
Matters

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.



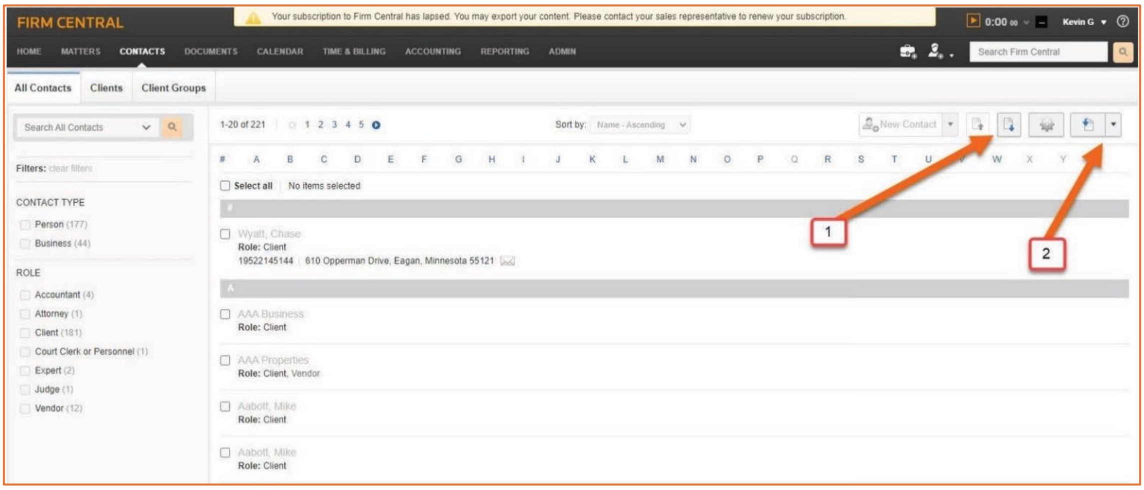




Contacts and Clients

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

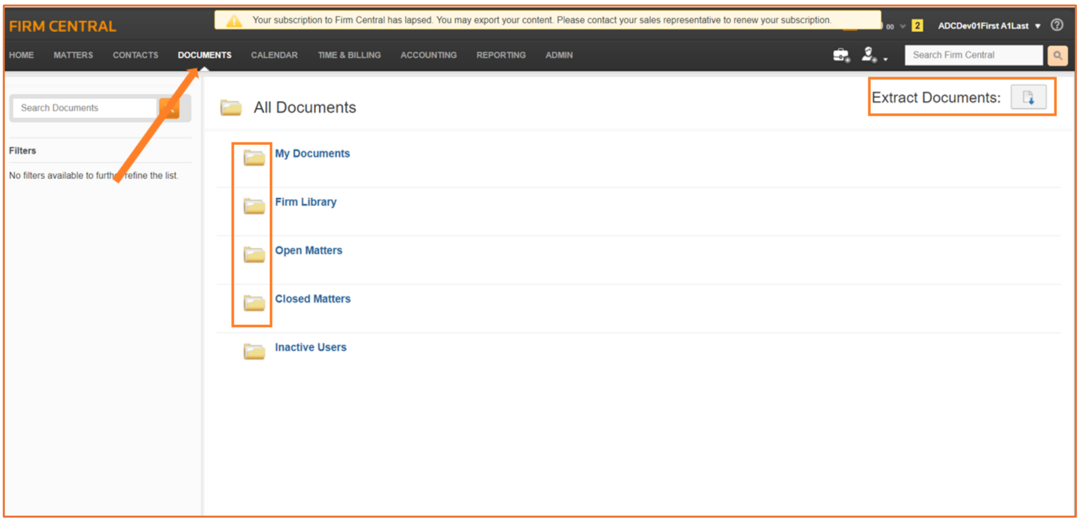
1. Selecting this menu option will download your Contact and Client list as a .CSV file. The file will contain most, but not all, of the information on the Contact and Client intake form.
2. This second option will allow you to export to a .CSV file, like the first option. In addition, you will be able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



Documents

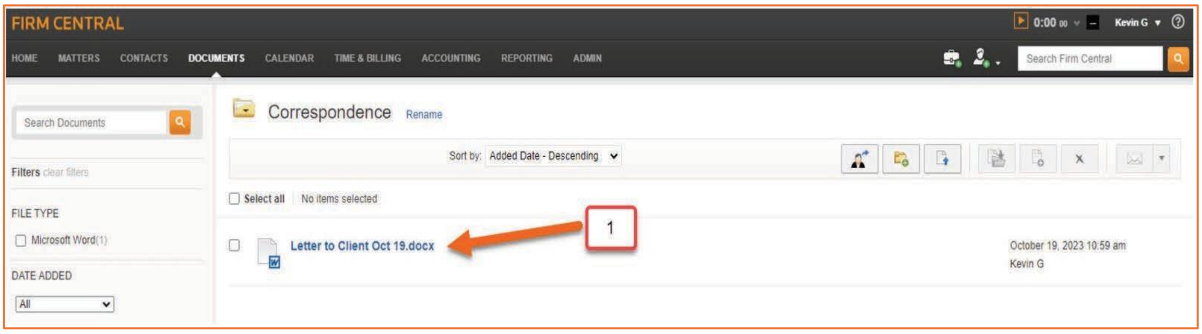
The Documents Tab will have full access to all documents, including the ability to run the search option. Please note that you must be logged in as Admin to access the “My Documents” folder for any inactive user.

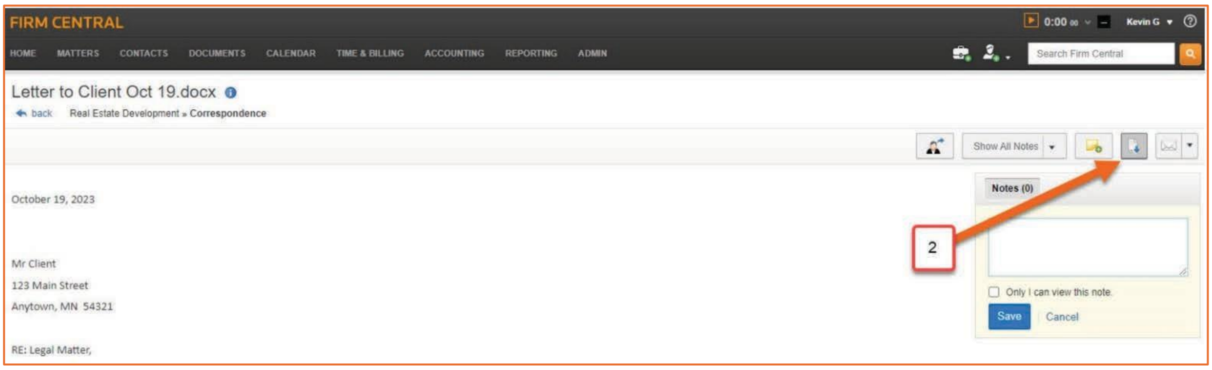
To download an individual document, drill down into the folder to the document you want to download. To download bulk documents, select the “Extract Documents” icon on the top left. Refer to the “Download Bulk Documents” section to download data in bulk.



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.

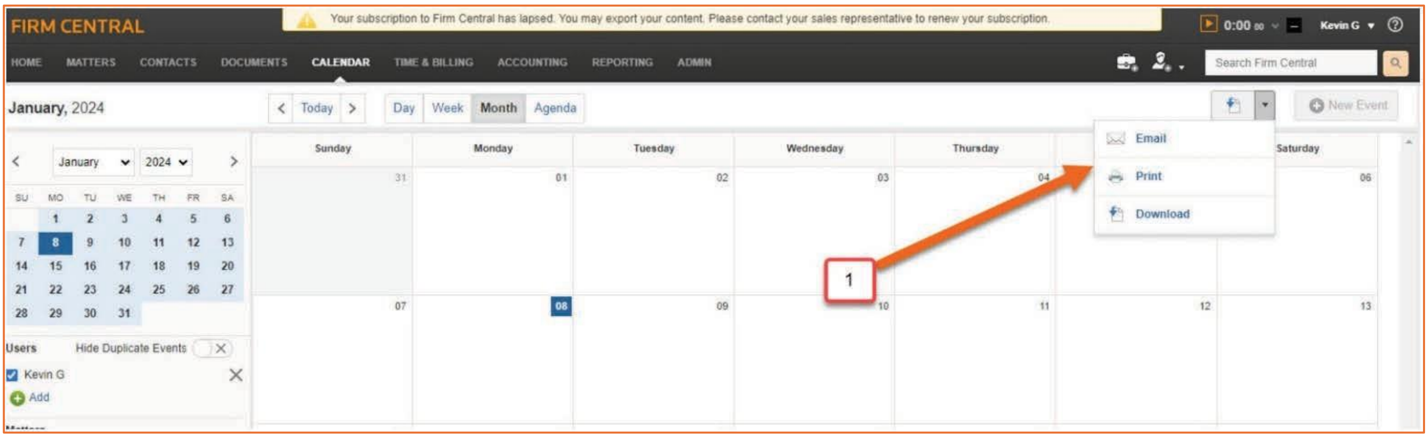




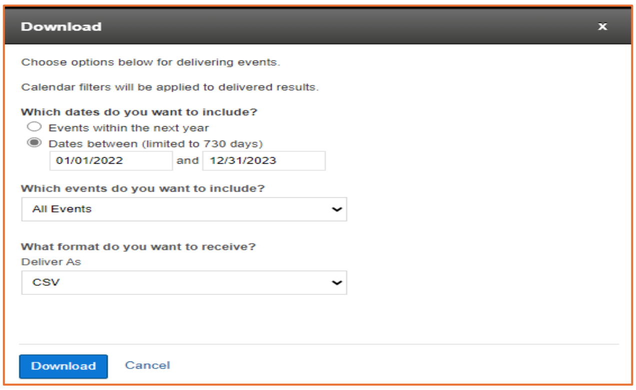
Calendar

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.

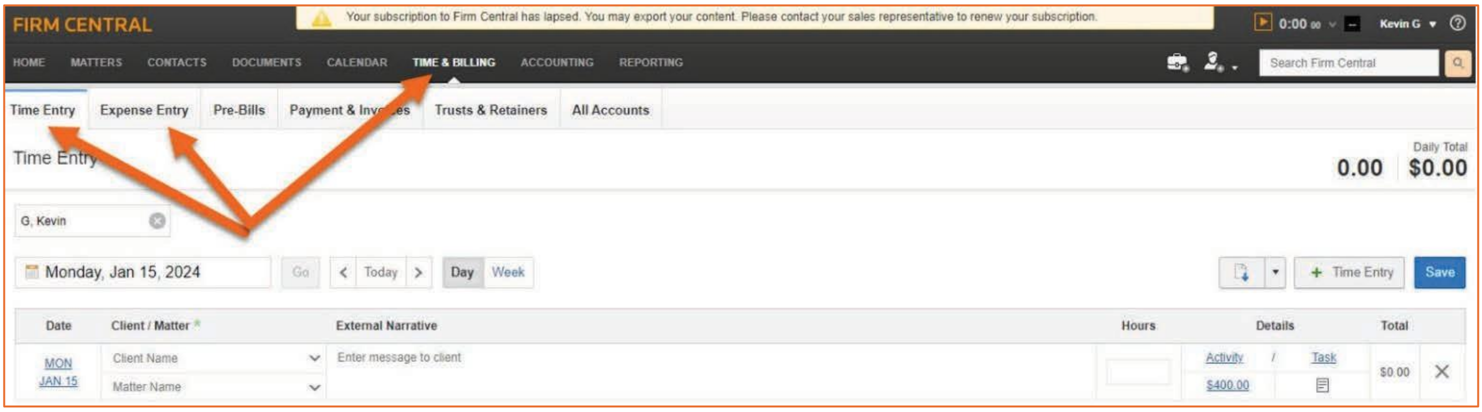


Time & Billing

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.

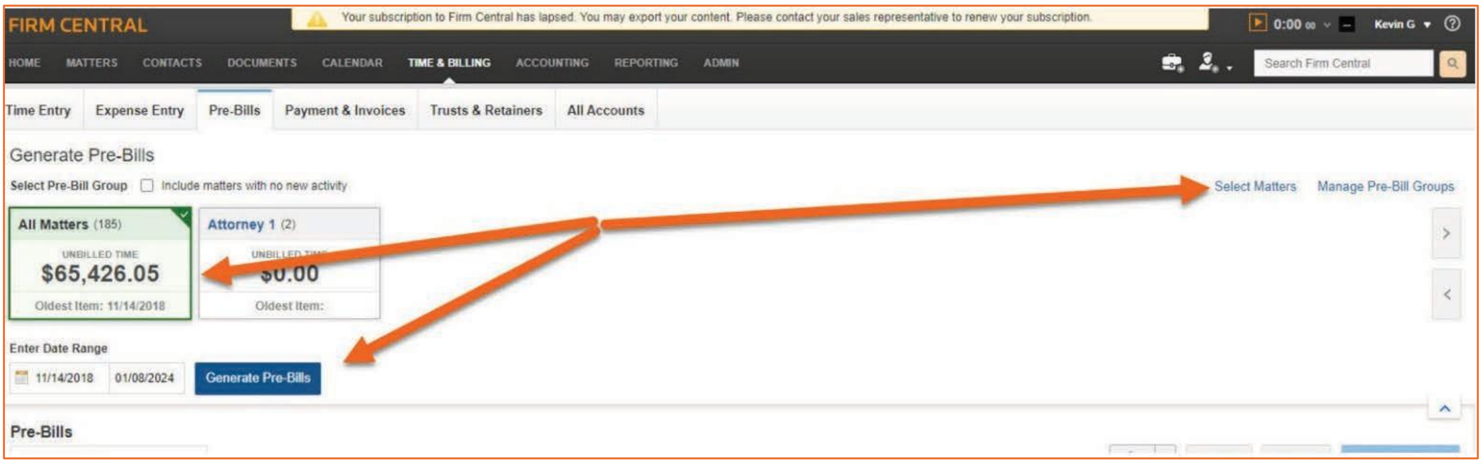
Time Entry and Expense Entry

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.



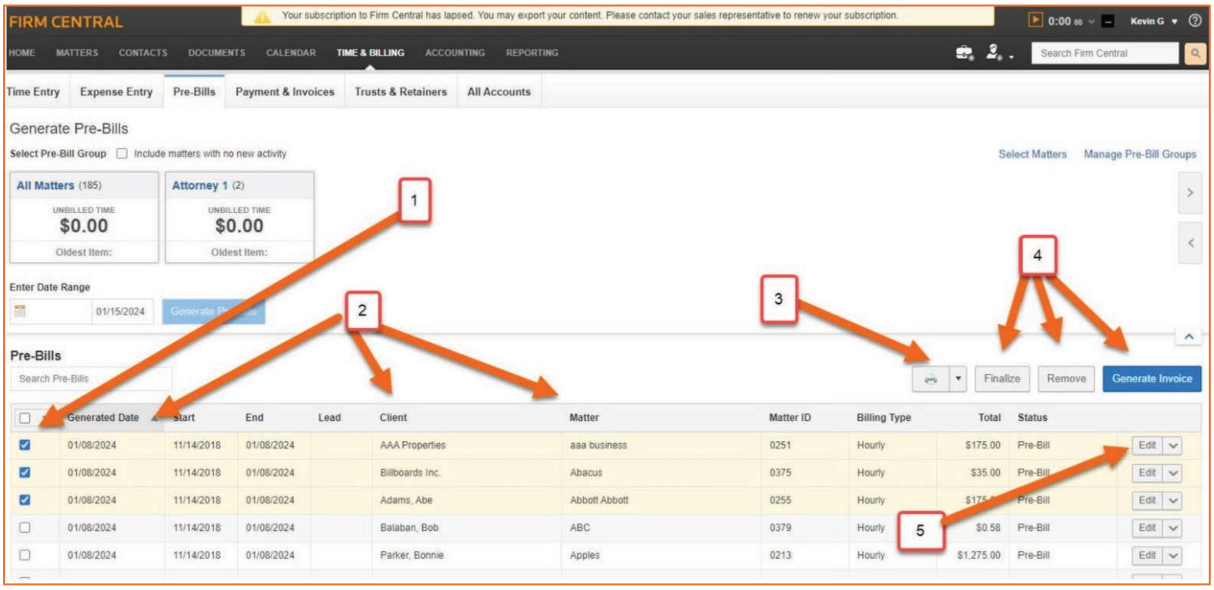
Pre-Bills

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.

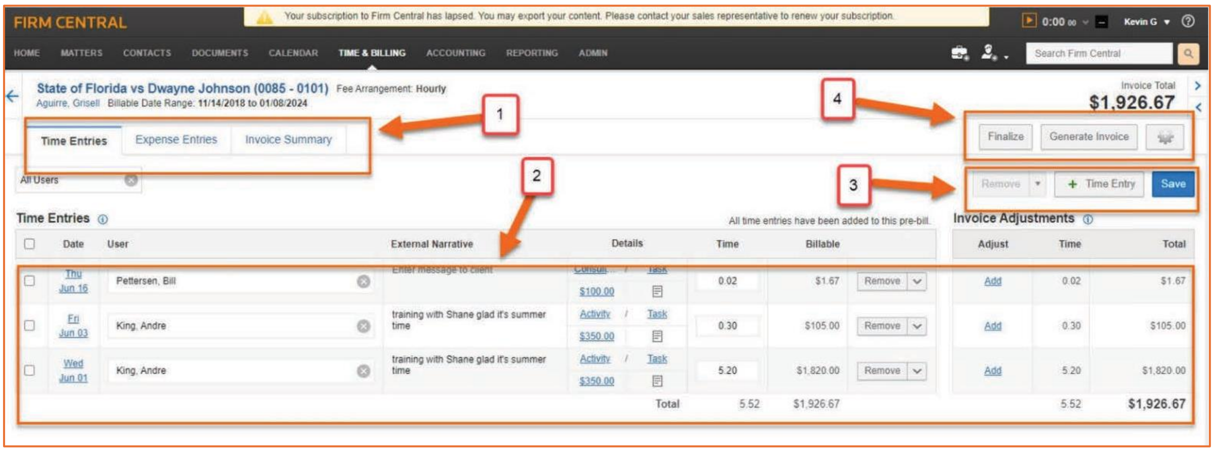


Edit a Pre-Bill

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.

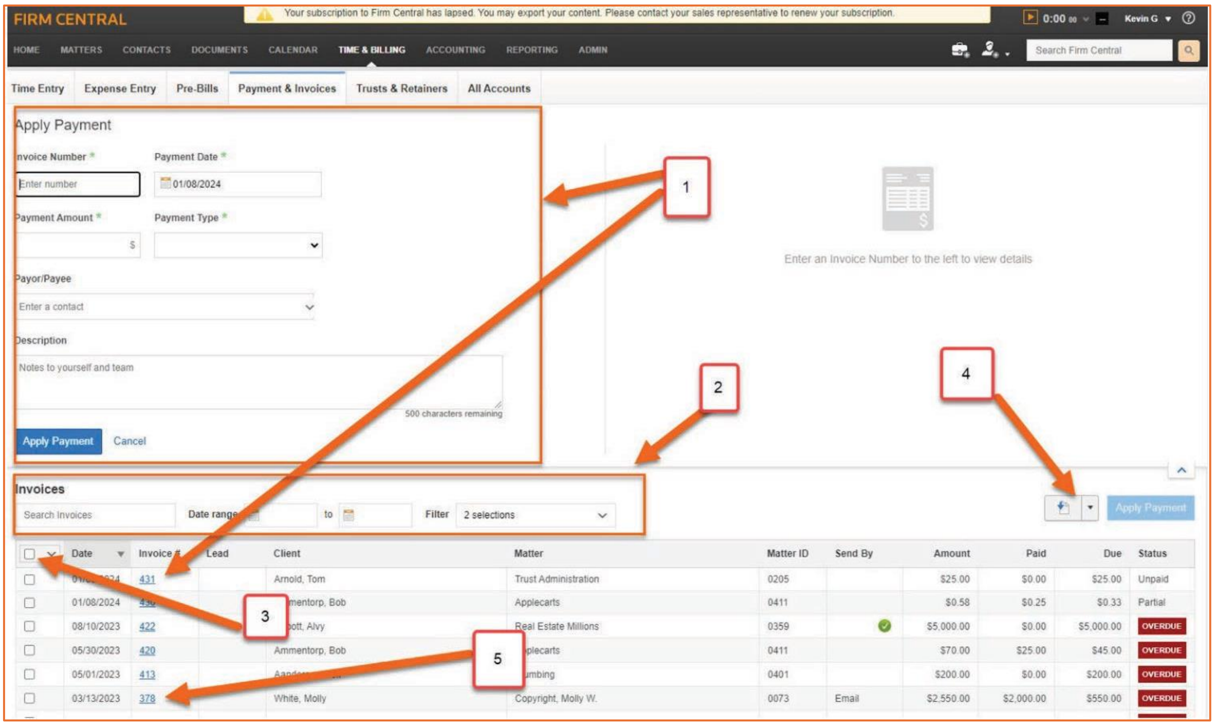
Note: Even though we are not showing the "Expense Entry" page or the "Pre-Bill" Summary page, these pages are fully functional.



Payment & Invoices

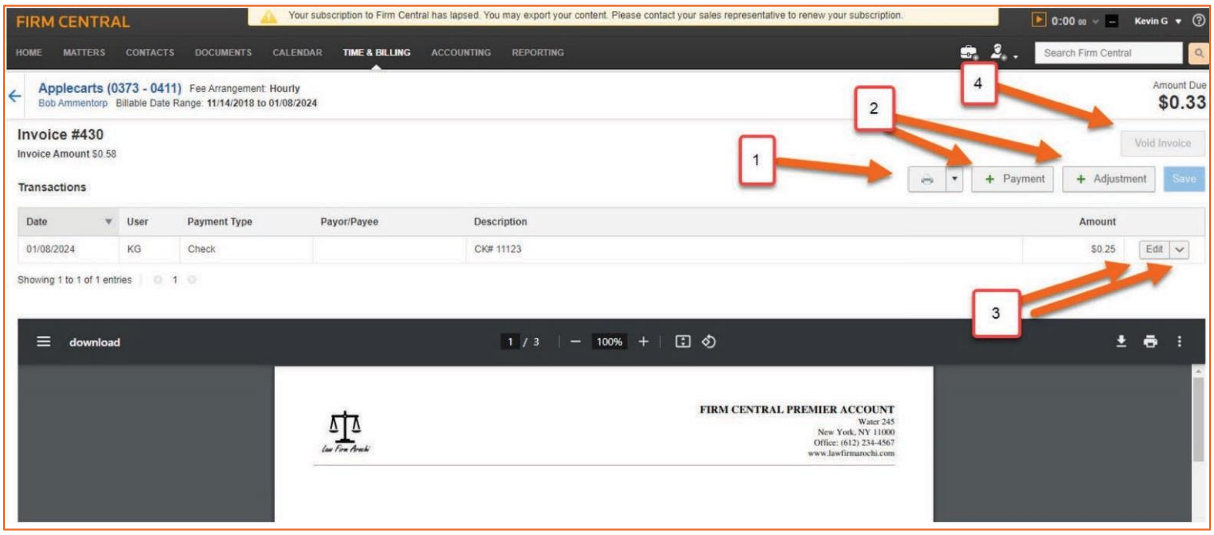
The Payment & Invoices page is fully functional. You will have all the ability to:

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.



All functions are available on the alternate Invoice page including:

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

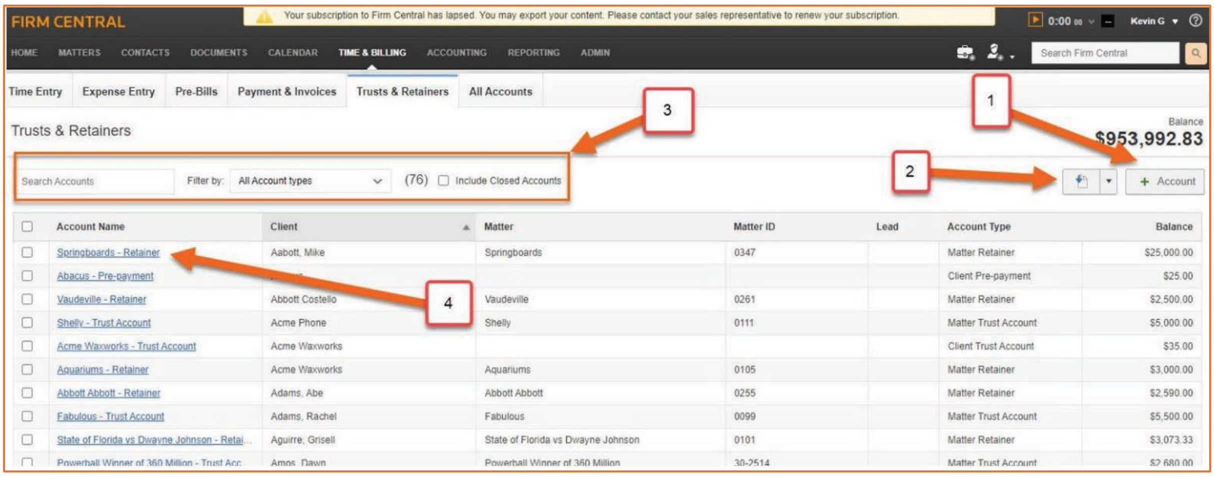


LawPay and Quickbooks Integration:

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

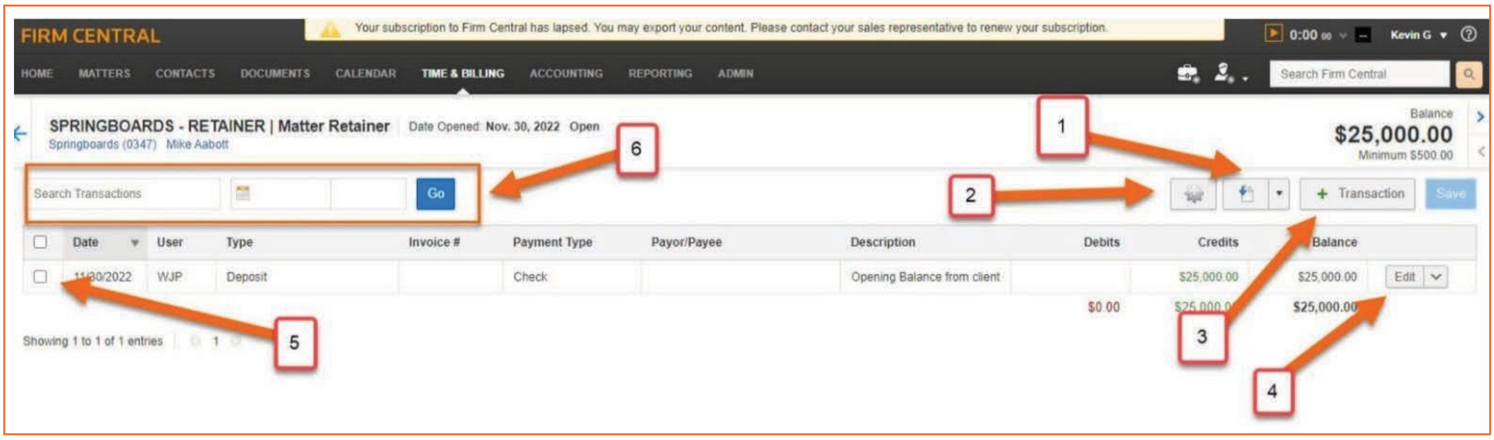
Trust & Retainers

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



All the functions within the individual accounts are active.

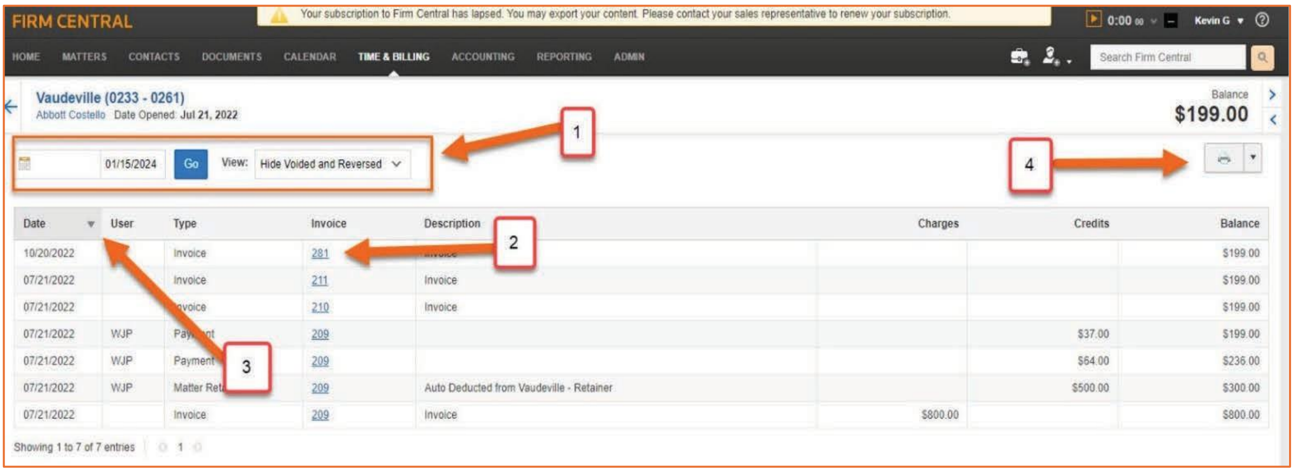
1. Print, Download, or Export.
2. Edit or close.
3. Add a transaction.
4. Edit a transaction.
5. Select transactions.
6. Filter options.

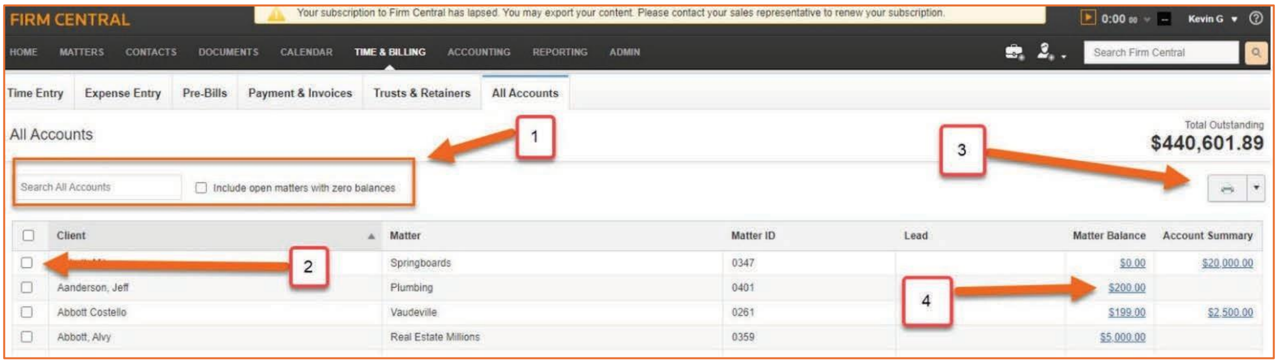


All Accounts

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.



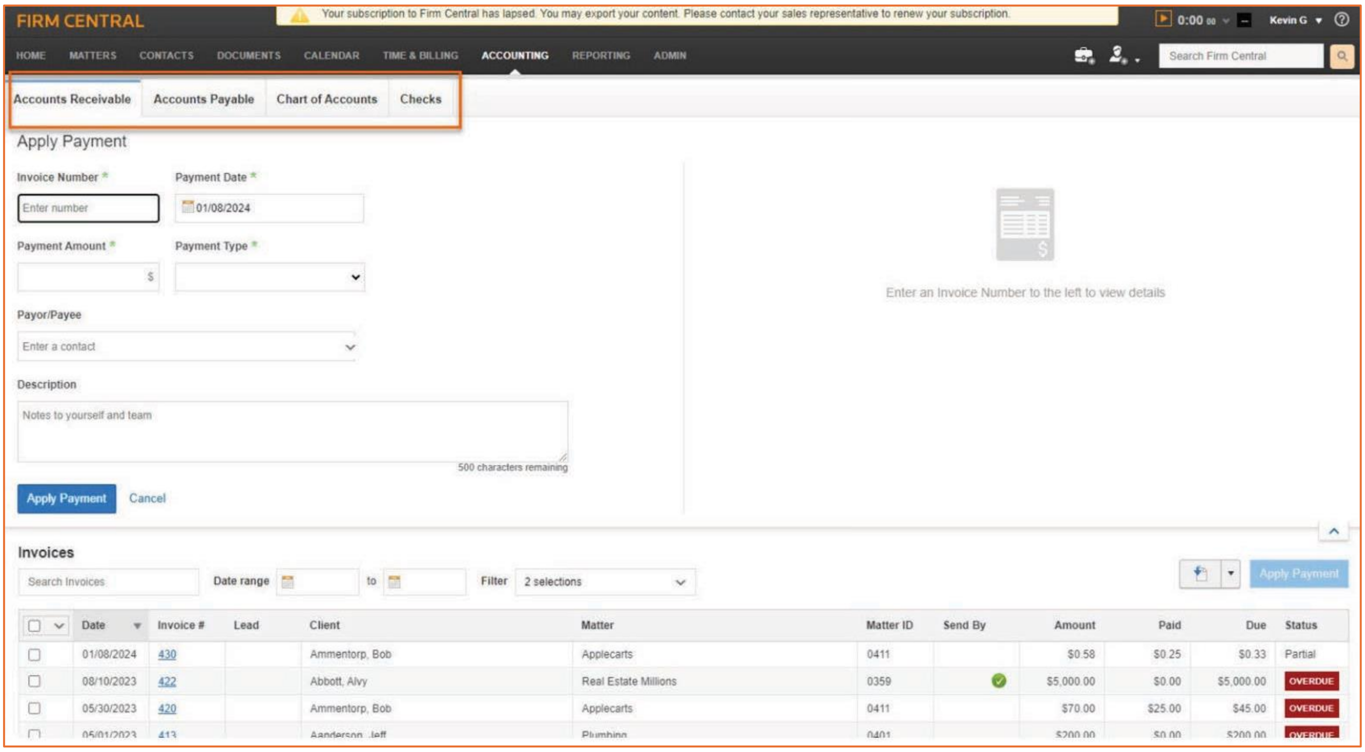


All functions are working within an individual account under “All Accounts”, including:

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

Accounting

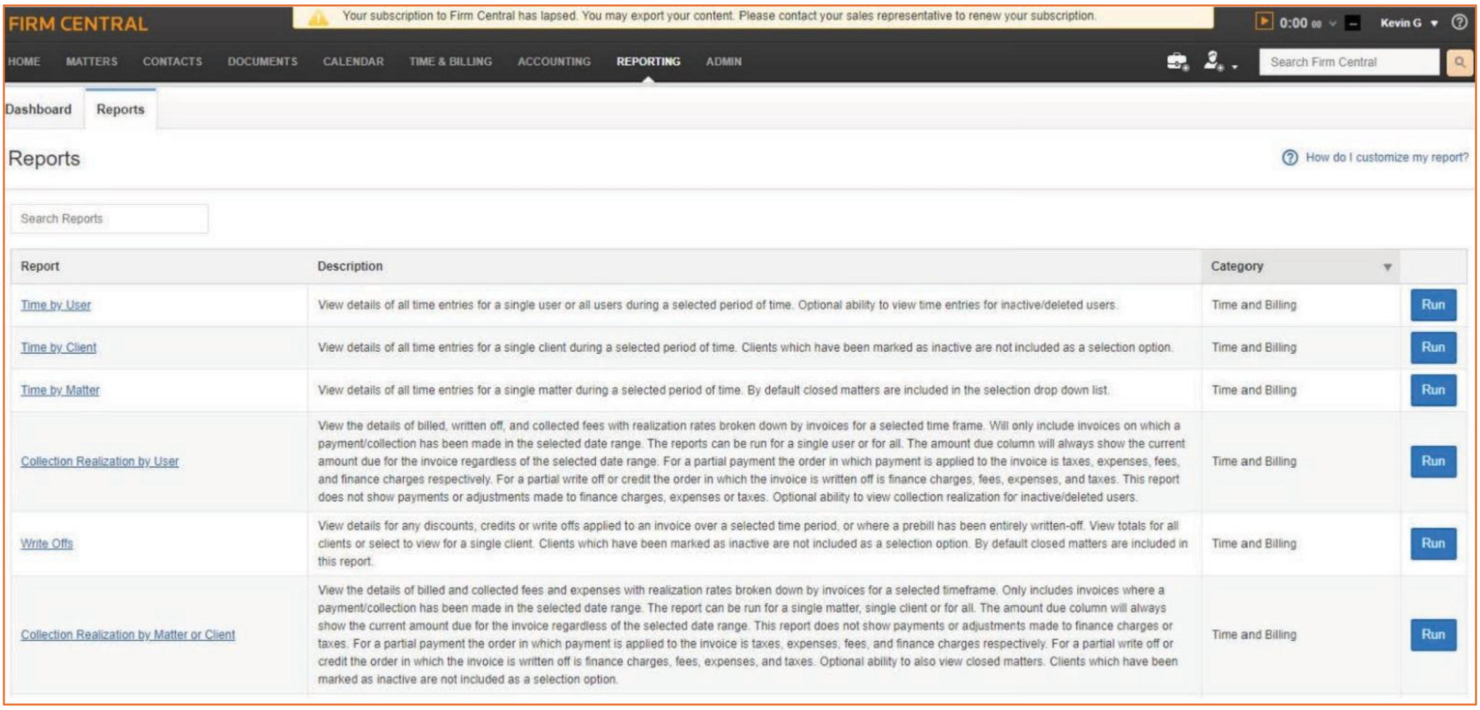
All functions within the Firm Central Accounting Module are fully functional, allowing you to print, download, export, reconcile, add adjustments, and perform other activities. We will now provide a high-level overview of each page. As with the Time & Billing section, we will not go into detail on each 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.



Reporting

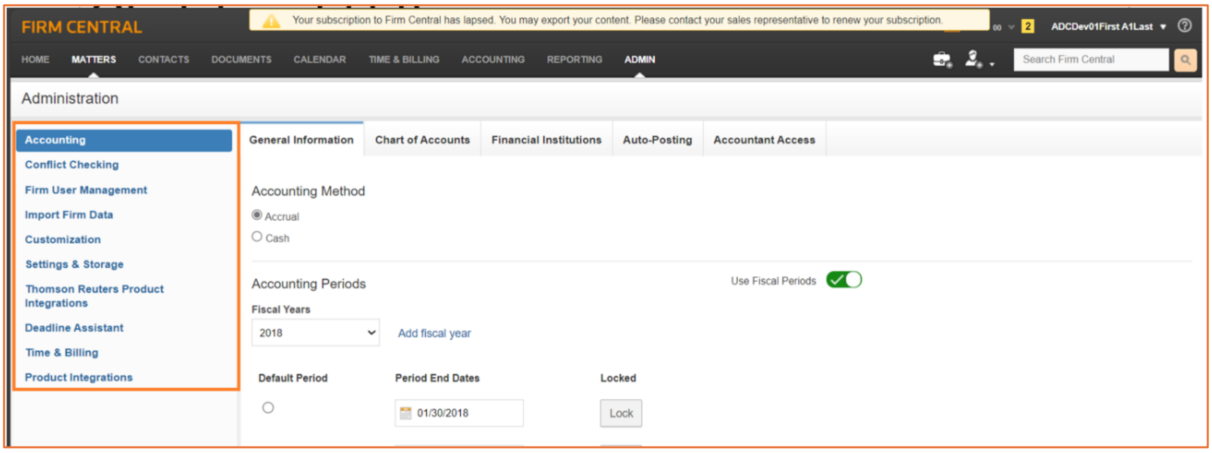
The Reporting page along with Dashboard and Reports are all fully functional, allowing you to export data.

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



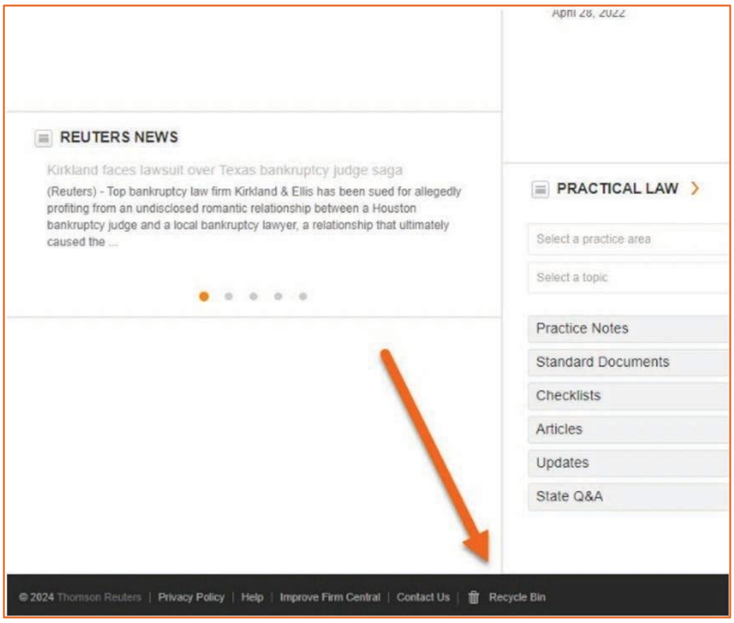
Administrative Menu

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.



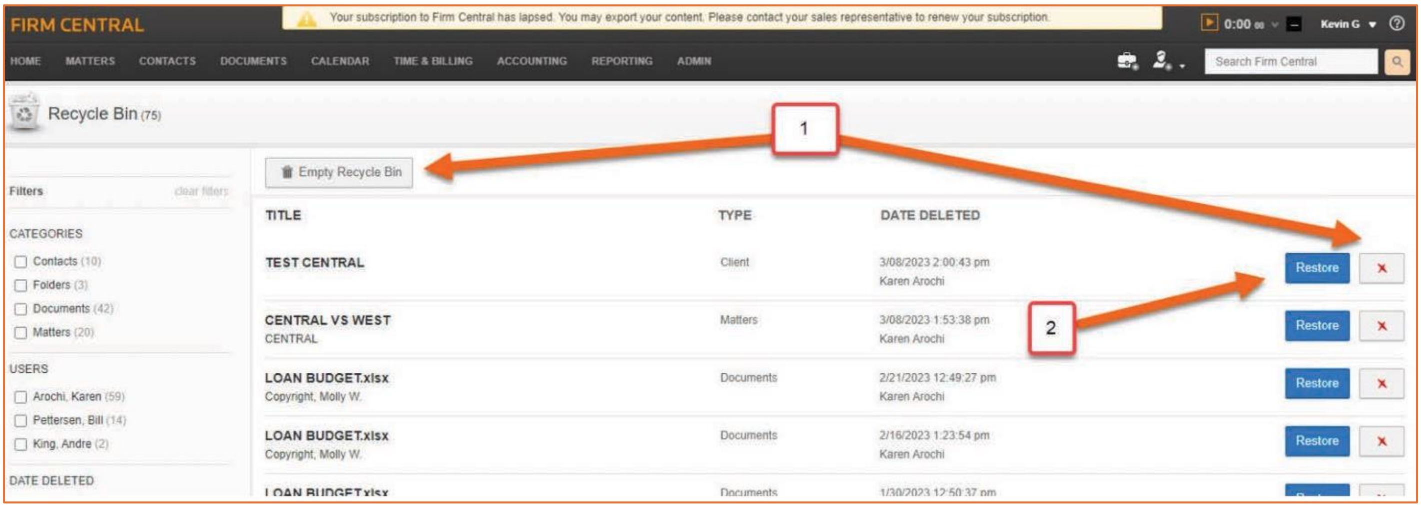
Recycle Bin

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.



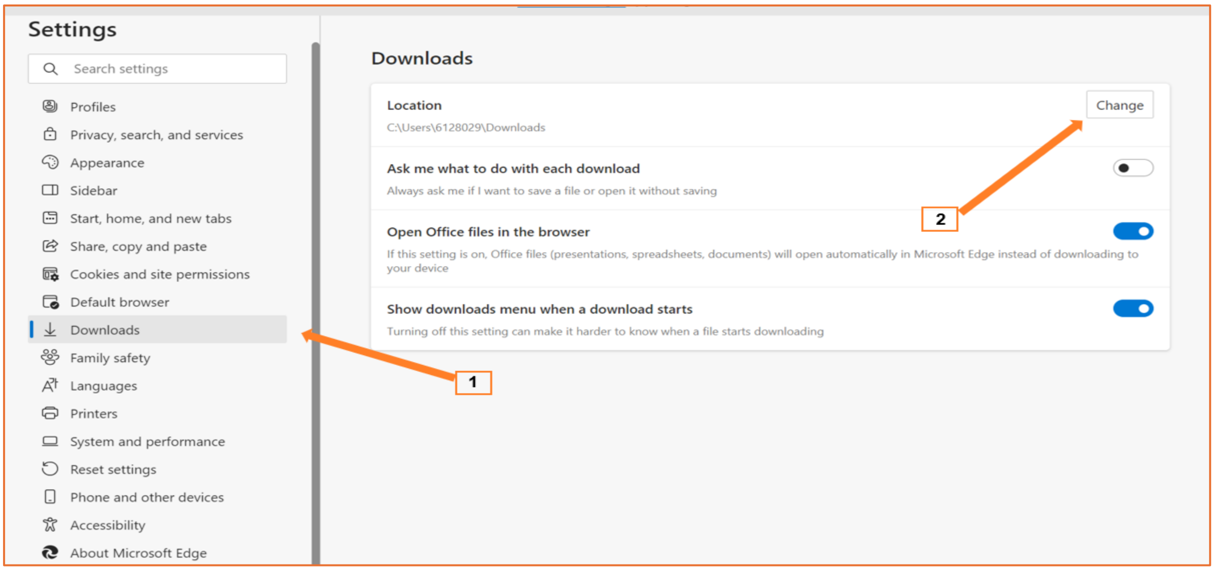
Change the download location in browser.

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.