

FIRM CENTRAL working with contacts and clients guide





FIRM CENTRAL

Working With Contacts and Clients Guide

Add contacts and clients to Firm Central[™] so that you can access all of your relevant connections from a central location. Contacts include prospective clients, attorneys, judges, vendors, and your own private contacts. Clients can be people or businesses. A matter requires a client before you can add it to Firm Central.

You can create contact or client entries one at a time, or you can import multiple contacts or clients to Firm Central using a .csv file. If a contact becomes a client, you can easily convert the contact to a client. If there is more than one client for a matter, you can add them to a client group for easy organization and access.

Contents

3	Viewing Contact Lists
3	FILTER A CONTACT LIST
3	ADD A NEW CONTACT, CLIENT, OR CLIENT GROUP
3	IMPORT CONTACTS OR CLIENTS TO FIRM CENTRAL
3	EXPORT CONTACTS FROM FIRM CENTRAL
4	DEACTIVATE OR REACTIVATE A CONTACT
5	Working with Contacts
5	ADD A CONTACT
6	IMPORT MULTIPLE CONTACTS
8	VIEWING A CONTACT PAGE
8	Edit Client Information
8	Add the Contact to a Client Group
8	Delete a Contact
8	Convert a Contact to a Client
8	Run a Conflict Search
8	Print Contact Information
9	EXPORTING CONTACTS FROM MICROSOFT OUTLOOK
9	Export Contacts into a .csv File from Microsoft Outlook 2013
9	Export Contacts into a .csv File from Microsoft Outlook 2010
9	Export Contacts into a .csv File from Microsoft Outlook 2003 and 2007

Working with Clients

ADD A CLIENT

10

10

11

12

14

14

14

14

14

14

14

14

15

15

16 16

16

16

16

- CONVERT A CONTACT TO A CLIENT
- IMPORT MULTIPLE CLIENTS
- VIEWING A CLIENT PAGE
- Edit Client Information
- Add a Matter
- Add the Client to a Client Group
- Deactivate the Client
- Delete a Client
- Run a Conflict Search
- Print Client Information

Working with Client Groups

- CREATE A CLIENT GROUP
- VIEWING A CLIENT GROUP PAGE
- Edit a Client Group
- Add a Matter
- Deactivate the Client Group
- Delete a Client

Customer Support 1-888-287-8537

Reference Attorneys 1-800-REF-ATTY 1-800-733-2889

http://legalsolutions.thomsonreuters.com/lawproducts/solutions/firm-central/support



Viewing Contact Lists

The All Contacts, Clients, and Client Groups lists serve as a landing page fore the Contacts tab in Firm Central. This starting point allows you to view and filter contacts along with other functions.

FIRM CENTRAL			🕨 0:00 ∞ 🗸 🗕	FC User
HOME MATTERS CONTACTS DOCU	MENTS CALENDAR TIME & BILLING	e, 2, .	Search Firm Central	٩
All Contacts Clients Client Groups				
Search Clients	1-20 of 541 0 1 2 3 4 5 0		• 6 6 9	-
Filters: clear filers	A B C D E F G H I J K L M N O P Q R	S T U	V W X Y	z
CONTACT TYPE	A select all two items selected			
Person (461) Business (80)	Aaroid, Ervid "Erv" Rote: Client, Expert 089-987-974 1 ook street			
STATUS Active Clients (538) Inactive Clients (3)	Abbott, Tom Roke: Client Gal			
ROLE Atomey (6) Client (501)	ABC Company Primary Contact: Norman Hayden Role: Client			

FILTER A CONTACT LIST

- Use the Sort by: drop-down menu to arrange contacts, clients, or client groups in alphabetical order from A-Z (ascending) or Z-A (descending).
- 2 Use the letter links at the top of the All Contacts or Clients lists to jump to that letter.
- Search for contacts, clients, or client groups using the *Search* field in the left column. As you type, suggestions will appear directly below the *Search* field. Select the contact to jump their profile page.
- In the left column, select filters in categories such as Contact Type, Status, and Role to automatically narrow the list of contacts or clients.

ADD A NEW CONTACT, CLIENT, OR CLIENT GROUP

Click the New Client or New Client Group button to begin the process of adding a new contact, client, or client group.

IMPORT CONTACTS OR CLIENTS TO FIRM CENTRAL

Click the Import Contacts button to begin the process of importing multiple contacts or clients.

EXPORT CONTACTS FROM FIRM CENTRAL

You can export all of the contacts in Firm Central except for other users' private contacts. The Firm Administrator can export all contacts, including users' private contacts.

- Click the Export Contacts button on the All Contacts or Clients list.
- a. Choose the **Open** or **Save** option displayed by the browser you are using.
- b. The list of contacts includes both contacts and clients and identifies each entry accordingly.

SME MATT	rens co	NTACTS DOCUM	IENTS	CA	ENDA	• •	INE & E	BILLING														-	• •	•	Sean	:h Fim	n Centr	al	<u> </u>
Contacts	Clients	Client Groups																							6	2			
Search All Co	ontacts	Q	1-20	of 804		1 2	3 4	5 0					Sort	ay: N	ame - A	scending	•			(0	.	New C	ontact	•	4	1	ŝĝ	[] •
tters: clear fil	ters		*	A	в	с	D	Е	F	G	н	1	J	к	L	м	N	0	Р	Q	R	s	т	U	v	w	3	Y	z

FIRM CENTRAL			► 0:00 00 V - FC User ▼
HOME MATTERS CONTACTS DO	CUMENTS CALENDAR TIME & BILLING		🙃 🚨 . Search Firm Central 🔍
All Contacts Clients Client Grou	ps		
Search Client Groups	1-18 of 18 0 1 0	Sort by: Name - Ascending	🚨 New Contact 🔹 😝
	Abelson Action		2
	Anderson Family		

Additionally, there is a **Delivery** button on the All Contacts, Clients, and Client Groups lists. Located on the far right of the toolbar, this button is another way to export these lists, and you can choose which entries you want to export.

- 1 Select the contacts you want to export by selecting the check box preceding each entry. Select the *Select All* check box at the top of the list to select all entries.
- Click on the Delivery button, and then select from the drop-down menu the method you want to use to deliver the list: print, email, or download. Once the list is generated, fill in the information specific for the delivery method.

DEACTIVATE OR REACTIVATE A CONTACT

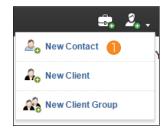
When you deactivate a client or contact, their information remains saved in Firm Central, but it is not queued when you type their names into fields that call for client and contact information.

- Select the contacts you want to deactivate by selecting the check box preceding each entry. Select the Select All check box at the top of the list to select all entries.
- Click the More Options icon, and then click Deactivate to deactivate the clients and contacts or click Reactivate to return them to Active status.
- When a contact or client is deactivated, an INACTIVE icon will appear next to their name in the list.

				3 4 1	50					Sort t	y: N	ame - A	scending	•					_ o	New Contact Reactivate Client
#	A	в	с	D	E	F	G	н	i.	J	к	L.	м	N	0	Р	Q	R	s	
Se Se	elect al	1 iter	m sele	cted c	lear se	lected														V Deactivate client
Α																				
F	Role: Cl	Ervid " lent, Exp -9874	ert																	

3		
	Arburn, Aaron	INACTIVE
	Role: Client	

Working with Contacts



ADD A CONTACT

1 Add a single contact in one of two ways:

- Click **New Contact** from the *Contacts* drop-down menu in the banner.
- Click the Contacts tab in the Firm Central header and then click **New Contact**. You may have to select it from the drop-down menu.

FIRM CENTRAL		▶ 0:00 ∞ ∨ - FC User ▼
HOME MATTERS CONTACTS DOCI	MENTS CALENDAR TIME & BILLING	🚓 🚨 🚬 Search Firm Central
All Contacts Clients Client Groups		
Search Clients	1-20 of 541 0 1 2 3 4 5 0 Sort by: Name - Ascending V	🚨 New Contact 🔹 📑 📑 🙀 🔹
Filters: clear filters	# A B C D E F G H I J K L M N O P C	D 2 0 NewContact
CONTACT TYPE	Select all No items selected	Ao New Client
Person (461)	1 Call Does it All Inc.	Rew Client Group
Business (80)	U 1 Gail Does it All Inc.	

0	11-
Contact Deta	113
Contact Type *	Business
Name	<u> </u>
First Name *	Last Name *
 Additional Name 	internation
Email	
Home	•
o Add Email	
Phone	
Home	
o Add Phone	
Website	
vvebsite	
Address	
Hane •	
City	
County	
State	Salaci •
ZIP	
Country	United States •
Add Address	
0 A01 A03166	
 Additiona 	al Information
Roles	
Active Streetwork	Dadar Presente Cent
Active Strawbakter Attorney Expert Witness	Data Propositive Cheri Data Data Data Data Data Data Data Dat
Wirnes	Coart Clerk or Personnel
Employment	
Employment Employer	Job Title
	International Contract of Cont
Employer Custom Field	200 TEN
Employer	200 TEN
Employer Custom Field	200 TEN
Employer Custom Field	201700
Employer Custom Field Emergency Conte	201700
Employer Custom Field Emergency Conte	201700
Employer Custom Field Emergency Conta 200 characters rem Marital Status Connection	All Time S all all all all all all all
Employer Custom Field Emergency Cente 200 characters rem Marital Status -Salact-	200 1000
Employer Custom Field Emergency Centa 20 characters rem Marital Status -Salact- Connection -Salact- DOS	2 An 1920 2 An 1
Employer Custom Field Emergency Cente 200 characters nem Marital Status -Salact- Connection -Salact-	2 An 1920 2 An 1
Employer Custom Field Emergency Cente 20 shared Status -Salest- Connection -Salest- ODE Enter date (m)	2 An 1920 2 An 1
Employer Custom Field Emergency Centa 20 characters rem Marital Status -Salact- Connection -Salact- DOS	2 An 1920 2 An 1
Employer Custom Field Emagency Cente 20 shared Status -Salest- Connection -Salest- ODE Connection DOE Notes	2 An 1920 2 An 1
Employer Custom Field Emergency Conte 200 characters rem Mentel Status —Salact— Consection —Salact— COS Employee Consection Notes Notes Notes	- Ana Free
Employer Custom Field Emagency Cente 20 shared Status -Salest- Connection -Salest- ODE Connection DOE Notes	- Ana Free
Employer Custom Field Emragency Center 200 characters nem Maritel Status Connection —Status —Connection —Status — Connection — Status _ St	ран тем 5 ма матар
Employer Custom Field Emragency Center 200 characters nem Maritel Status Connection —Status —Connection —Status — Connection — Status _ St	- Ana Free
Employer Custom Field Emragency Center 200 characters nem Maritel Status Connection —Status —Connection —Status — Connection — Status _ St	All File 1 4 4 4 4 5 40 5 40 5 40 5 40 5 40 5 40 5 40 5 40

The New Contact form is displayed. You must specify whether the contact is a person or a business. The form also provides options for classifying the contact by type, such as prospective client or lawyer.

3 You must fill in the *First Name* and *Last Name* fields. All other information is optional. You can edit this information later.

At the bottom of the form, select *Public* if you want to allow anyone at the firm to see this contact. Otherwise, select *Private* so only you can see it. The default selection is *Public*.

5Click **Save**.

FIRM CENTRAL	1																							Þ	0:00 0	o v	FC	User 🔻
HOME MATTERS	CONTACTS DOCU	MENTS	CA	LENDA	R T	IME & E	ILLING														٤	2	• •	Search	Firm C	entral	_	٩
All Contacts Client	s Client Groups																											
Search All Contacts	<u> </u>	1-21	0 of 804		1 2	3 4	5 0					Sort	by:	Varne - A	lacendin;	•					_ o	New C	ontact	•		ŝ	à C	•
Filters: clear filters			A	в	с	D	Е	F	G	н	1	1	к	L	м	N	0	Р	۵	R	s	т	U	× 4		x	< 2	

Organize 🔻 New folde	a.		III 🔹 🗖 🌔
★ Favorites	Documents library Matter Documents		Arrange by: Folder •
鷆 Downloads	Name	Date modified	Туре
Stopbox	Age Discrimination	3/10/2016 11:39 AM	File folder
Recent Places	Orion - Matter X (Fox v Bergman)	3/10/2016 11:39 AM	File folder
Creative Cloud Fr	AccidentReport Anderson	3/11/2016 8:58 AM	Adobe Acrobat Document
🕞 Libraries	MndersonQuickmart Notes	3/11/2016 8:54 AM	Microsoft Office Word Document
Documents	FirmClients	3/10/2016 10:59 AM	Microsoft Office Excel Comma Separated Values Fil
Music	FirmContacts	3/10/2016 10:59 AM	Microsoft Office Excel Worksheet
Pictures	FirmContacts2	5/9/2016 2:00 PM	Microsoft Office Excel Comma Separated Values Fil
Videos	🗟 matterstoupload	3/10/2016 11:52 AM	Microsoft Office Excel Comma Separated Values Fil
-	< [

Found 6 contacts in file. M	ent		
Mapping contai			
• Field Employer is			
Sample	Column Name	Matched Field	
[tionk]	1 Else	Profit	
lim	First Name	a Find Nerro	
Hander	Last name	Land Nerros	
[there]	Saffix	Suffix	
[biank]	Company	Employer	
		Field Employer is mapped 2 times.	
[timk]	Department	Errpkover	
		Field Employer is mapped 2 times.	
[biank]	Job Tille	Job Tille	
[biank]	Sustrees Street	Address 1 Line 1	

IMPORT MULTIPLE CONTACTS

Import multiple contacts to Firm Central using a .csv file. You can create this file by exporting your contacts from Microsoft Outlook.

- 1 Click the Contacts tab in the Firm Central header.
- **2** Toggle to the All Contacts subtab and click the **Import Contacts** icon.
- 3 Access the .csv file containing your contacts and then click **Open**.
- 4 Before you import all of your contacts, Firm Central displays the Import Management page. This page contains three columns:

Sample: The sample data is extracted from the first contact row in your file. You can refer to this data when you map the column names from your file to the fields available in Firm Central.

Column Name: The column names are extracted from your file so you can map your column names to the fields available in Firm Central.

Matched Field: Firm Central attempts to match the column names from your file to the fields in Firm Central for you.

- a. Review the fields. If a field does not match your column name, select the appropriate field from the drop-down menu. You cannot match a field to more than one column name.
- b. Click Next.

Note: Firm Central displays an error message if you have matched a field to more than one column name. Correct this error by selecting a new field from the drop-down menu. You can choose *Select* at the top of the menu if you don't want to map the column name to a specific field. After you have corrected the error, click **Next**.

+	Back						
1-5	of5 010	b		6			Import Select
	Select All All		All Clients	All Public All Priv	ate		
		Contact	Public	Active	First Name *	Last Name *	
	Business	Client	O Private	 Inactive 	5	Handler	Impo
8	More Fields						
		Contact	Public	Active	First Name *	Last Name *	
	O Business	O Client	 Private 	Inactive	Kimberly	Jones	Impo
6	More Fields						
	Person	Contact	Public	Active	First Name *	Last Name *	
	O Business	O Cilent	O Private	 Inactive 	David	Anderson	Impo
œ	More Fields						
	erson	Contact	Public	Active	First Name *	Last Name *	
	O Business	O Client	 Private 	Inactive	Mike	Nelson	Impo
	More Fields						

O Business O Client O Private O Inactive	Kentaely			James		_
	ransary			John Market		
Spouse's/Partner's Name	Prefix	Preferred Name		Middle Name	Suffix	
Employer						
Building Design						
Job Title	Referred By			Notes		
Website	Alternate ID					
Email	Phone			Address		
Hama •	Hame •	(812)000-0121	×	Hame •	×	
				City	County	
					County	
				City State	County	
				State Salazi		
				State	Country	
				State Salazi		
				State Salazi	Country	
Enropsing Central	Marital Status			State -State:	Country	
Energiency Contact	Marital Status —Salet—		•	State ZIP @ Add Address	Country	
			·	State ZIP @ Add Address	Country	
	-Salact		•	State Satet	Country	
			•	State ZIP @ Add Address	Country	
	-Salact			Datebatc	Country United States •	
Dener	Connection -Salest			State State State State State State State State State State State St	Country United States •	
Qasar .	-Salact			Datebatc	Country United States •	

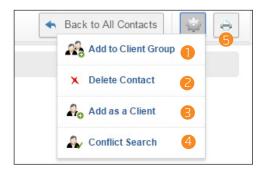
- 6 At the Import Management page, Firm Central lists your contacts.
- a. Deselect the check box for any entry that you determine you do not want to import.
- b. Select whether an entry is a client or a contact. If all entries are one or the other, click either **All Contacts** or **All Clients**. All clients are public.
- c. Select whether an entry is private or public. If all entries are one or the other, click **All Public** or **All Private**.

Note: Choose **All Private** if you do not wish to select the status of each contact at this time (unless you know they are all public). You can edit contact information later to change a private contact to public, but you cannot change a public contact to private.

- d. Click **More Fields** to expand the information for the contact. An error message appears if you try to import a contact and have filled in a field incorrectly. Edit the data before trying to import again.
- ⁽⁶⁾ The form expands to show all of the fields for that contact. If any of the fields contain an error, a message will appear when you attempt to import the contact. Edit the data before trying to import again. After you have completed reviewing or editing the contact information, click **Fewer Fields** to collapse the fields.
- By default, the check box for each contact is selected. Deselect the check box for any contact you do not want to import. Click Import All Selected at the top of the page to import all of the selected contacts at one time. You can import contacts one by one by clicking Import to the right of the contact details for each contact you want to import.
- 8 After you have reviewed and imported your contacts, click Done at the bottom of the page to complete the import process.

9 The Contacts page is displayed.

FIRM CENTRAL		► 0:00 00 v - FC User v
HOME MATTERS CONTACTS DOC	UMENTS CALENDAR TIME & BILLING	🔄 🤰 Search Firm Central
Geoff Wall Vice President, Investments at Finance Exper NonClient	ts	
		Sack to All Contacts
Contact Details	Associated Matters	
Job Title Vice President, Investments	There are no associated matters.	
Employer Finance Experts		
Fax (866) 555-1212 🔶 Work (612) 555-1313		
Email geoff.wall@financeexperts.com 🔶		
Work 9050 S. 7th St 🔶 Minneapolis MN 55402 United States		



VIEWING A CONTACT PAGE

When you click on a contact's name, you are brought to their Contact Profile page. The left column displays contact information for the contact, and the right shows the matters they are involved in, if any. This page has several notable functions.

Edit Client Information

1 Click Edit in the Contact Details section.

a. The Edit Contact form displays the same fields as the New Contact form. Add or edit the information as necessary.

Note: The Edit Contact form does not include the Public/Private option if the contact is public. You can change a private contact to public, but you cannot change a public contact to a private contact.

b. Click Save.

Add the Contact to a Client Group

- Click the More Options icon on the right, and then click Add to Client Group.
- a. The Add to Client Group form appears. Select the Client Groups you want to add the client to, and click **Save**.

Delete a Contact

Click the More Options icon on the right, and then click Delete Client. All of their information will be erased from Firm Central.

Convert a Contact to a Client

Click the More Options icon on the right, and then click Add as Client to begin the process of converting this contact to a client.

Run a Conflict Search

If you are signed on to Firm Central as an Admin, the Conflict Search option is present in the More Options drop-down. Click Conflict Search to initiate a Conflict Search of the contact name.

Print Contact Information

- 5 Click the Print icon on the far right of the page to print the Contact Page. It includes the Contact Details and the matters they are associated with.
- a. The Print Preview window appears. Click **Print** to continue.

EXPORTING CONTACTS FROM MICROSOFT OUTLOOK

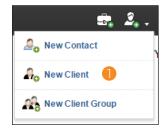
Export Contacts into a .csv File from Microsoft Outlook 2010 and 2013

- 1. Start Microsoft Outlook.
- 2. Click the **File** tab.
- 3. Click **Options** in the left column.
- 4. Click **Advanced** in the left column to display the Advanced options in the right frame and then click **Export** in the right frame.
- 5. In the Choose an Action to Perform box, select *Export to a file* and click **Next**.
- 6. In the Create a File of Type box, select *Comma Separated Values (Windows)* and then click **Next**.
- 7. In the Select Folder to Export From box, select the contact folder that you want to export and then click **Next**.
- 8. Below *Save exported file as*, click **Browse** to specify a location and name for the file and then click **Next**.
- 9. If necessary, map fields from the file you are exporting to the .csv file.
- 10. Click Finish. The .csv file is saved to the location you specified in Step 8.

Export Contacts into a .csv File from Microsoft Outlook 2003 and 2007

- 1. Start Microsoft Outlook.
- 2. From the File menu, click Import and Export.
- 3. In the Choose an Action to Perform box, select *Export to a file* and then click **Next**.
- 4. In the Create a File of Type box, select Comma Separated Vaues (Windows) and then click Next.
- 5. In the Select Folder to Export From box, click **Contacts** and then click **Next**.
- 6. Below *Save exported file as*, click **Browse** to specify a location and a name for the file and then click **Next**.
- 7. If necessary, map fields from the file you are exporting to the .csv file.
- 8. Click **Finish**. The .csv file is saved to the location you specified in Step 6.

Working with Clients



FIRM CENTRAL		▶ 0:00 ∞ v - rcu
HOME MATTERS CONTACTS DO	UMENT'S CALENDAR TIME & BILLING	🚓 💪 . Search Firm Central
All Contacts Clients Client Group	s	
Search Clients	1-20 of 541 0 1 2 3 4 5 0 Sort by: Name - Ascending V	🚨 New Contact 💌 📑 📑
itters: clear filters	# A B C D E F G H I J K L M N O P	Q Ao NewContact W X Y Z
	Select all No items selected	A New Client
CONTACT TYPE	1	New Client Group
Person (461)	1 Call Does It All Inc.	and the other order

Client De	
Client De	
8 Person	0 Durness
	Select an existing contact to add as a client.
Name	
First Name *	Last Name *
e A031072	Name information
Alternate ID	
Email	
Home	•
o Add Email	
Phone	
Home	
e Add Phone	
Website	
website	
Address	
Home +	
city	
county	
State	-desd- •
ZP	dext- •
Country	United States •
• A31 A32 65	
- Addition	nal Information
Roles # care	E Mar
Outer	
D Judge	Nas Adamy Expert
Employmer	
Clert Ourse Judge Judge Vendor Employmen Employee	.00 10a
Employment Employer Originating	Na Tra
Employmen	.00 10a
Employment Employer Originating	ttAanna Abbreay
Employment Employw Originating Delet Custom	Atomey Fields
Employment terproyer Originating	Atomey Fields
Employmer Employer Originating Detect Custom Emergency (t Attainey
Employmer Driginating —Deen— Custom Emergency (380 character	d Alamay
Employment Disployment Originating — 0866— Custom Emergency of 380 characters Marital Statu	t Abstrary
Employment Employment Originating —Deen Custom Emergency (280 character Marital State —Oelect	t annu annu annu annu annu annu annu ann
Employment Employment Originating Custom Emergency 0 280 character Marital State Delect	Atomicy Atomicy Fields among a
Employmer Deployer Originating -Steet Custom Emergency of 280 character Marital Stats. Delect Connection Steet	t Abstracy
Employmer Driginating - deed Custom Emergency (180 character Marital State - Delect Connection - Salect-	t ante ante ante ante ante ante ante ant
Employmer Employmer Originating —Dees— Custom Emergency of 380 character Marita Stat. —Deloch- Connecton —Delect Date of Mari	t Abstracy
Employment Employment Originating Deen Custom Emergency C Seconsection Defect Connection Seect Date of Marr III Enter da	t Atoma o and a management of the second of
Employment Employment Originating — Jeech — Custom Emergency (280 characterit Marital Statu — Delect — Connection — Seech — Date of Mari	t ante ante ante ante ante ante ante ant
Employment Employment Criginating -deed Custom Emergency d 380 character Martial State Select Date of Marting Emergency d Select Date of Marting Emergency d Select Date of Marting 	t Atoma o and a management of the second of
Employment Employment Originating — Jeech — Custom Emergency (280 characterit Marital Statu — Delect — Connection — Seech — Date of Mari	t Atoma o and a management of the second of
Employment Employment Originating -Best- Custom Emergency of 280 cnarecter Martial State -Generation -Seed- Date of Marti Consection Date of Martial Consection Date of Martial Consection Consectio	t Atoma o and a management of the second of
Employment terestyre Originating —deea— Custom Emergency of 200 creacter Market Market —deed— Connection —deed— Date of Market Market Dote of Market Market Dote of Market Market Dote of Market Market Notes Notes	t Abritery Felds contral a a a a a a a a a a a a a a a a a a
Employment project Originating -sees- Custom Emergency L 260 creates Martal Mart -seed- Connector Co	t menung me menung menung menu
Employmer previou Originating —sees— Custom Emergency (280 cnactes and statistic —sees— Consolon Cons	t mana mana mana mana mana mana mana man
Employment project Originating -sees- Custom Emergency L 260 creates Martal Mart -seed- Connector Co	t mana mana mana mana mana mana mana man
Employmer previou Originating —sees— Custom Emergency (280 cnactes and statistic —sees— Consolon Cons	t mana mana mana mana mana mana mana man
Employmer previou Originating —sees— Custom Emergency (280 cnactes and statistic —sees— Consolon Cons	t

ADD A CLIENT

1 Add a single client in one of two ways:

- Click **New Client** from the *Contacts* drop-down menu in the banner.
- Click the Contacts tab in the Firm Central header and then click **New Client**. You may have to select it from the drop-down menu.

- 2 The New Client form is displayed. You must specify whether the client is a person or a business.
- You must fill in the *First Name* and *Last Name* fields. All other information is optional. You can edit this information later.
- Firm Central automatically assigns a number to each of your new clients. You have the option to include an alternative ID for this client using the numbering system your firm uses to identify clients. If you do so, this alternative ID will display on the client profile screen, rather than the ID generated by Firm Central.
- 5 You have the option to include the name of the person who referred this client to you.

6 Click Save.

New Client	CONVERT A CONTACT TO A CLIENT
Client Details	Convert a contact to a client by adding a client in one of
Client Type *	two ways.
Person O Business Fred	
	Click New Client from the Contacts drop-down menu ir
Nama	the the banner.
Name Paul Fredrickson	the the banner.
Additional Name Information	Click the Contacts tab in the Firm Central header and
Alternate ID	then click New Client . You may have to select it from
	the drop-down menu.
Email	
Home ·	
Add Email	Enter the client's name in the Select an existing contact
Phone	to add as a client. field at the top of the New Client form.
Home •	
Add Phone	As you type, Firm Central will display a list of matching
	contacts. Click the name of the contact you want to
Website	convert to a client.
Address	
Home •	
	Firm Central automatically populates the fields with you
	contact's information.
City	
County	
StateGelect +	4 Firm Central automatically assigns a number to each
ZIP	
Country United States	of your new clients. You have the option to include
Add Address	an alternative ID for this client using the numbering
Additional Information	system your firm uses to identify clients. If you do so, this
Roles	alternative ID will display on the client profile screen,
Under Anney	rather than the ID generated by Firm Central.
Employment	,
Employer Job Title	
Originating Attorney	5 You have the option to include the person who referred
Dalact •	this client to you.
Custom Fields	
Emergency Contact	
	6 Click Save.
250 characters remaining	Note: All clients are public, so if your contact was private, it will become
Marital Status	
Select •	public when converted to a client.
Connection	
Select ·	
Date of Marriage	
Date of Marnage Enter date (mm/dd/yyyy)	
DOB Enter date (mm/dd/yyyy)	
Notes	
110/00	
500 characters remaining	
Deferred Dy	
Referred By Referred By	
Save Cancel	
b	

FIRM CENTRAL																							00	-	
IONE MATTERS CONTACTS DOCU																				. 2		Jearch Fir	m Cent	ral	<u> </u>
dl Contacts Clients Client Groups																									
Search Clients	1-20 of	541 i o	1 2 3	4 5 4	•				:	Sort by: (Name	Ascending	, •						2.	New Co	ntact •	6	1	ŝĝ	B •
itters: close filters		A B	с	D	е	G	н	ī.	J.	к	L	м	N	0	Р	Q	R	s	т	U	v	(2	k.	Y	z

Organize 🔻 New fol	der		III 🔹 🔟 🌘
★ Favorites ■ Desktop	Documents library Matter Documents		Arrange by: Folder 🔻
〕 Downloads	Name	Date modified	Туре
Stopbox	Age Discrimination	3/10/2016 11:39 AM	File folder
Recent Places Oreative Cloud Finance	Orion - Matter X (Fox v Bergman)	3/10/2016 11:39 AM	File folder
Creative Cloud Fi	AccidentReport Anderson	3/11/2016 8:58 AM	Adobe Acrobat Document
🗎 Libraries	AndersonQuickmart Notes	3/11/2016 8:54 AM	Microsoft Office Word Document
Documents	FirmClients	3/10/2016 10:59 AM	Microsoft Office Excel Comma Separated Values Fil
Music	🐴 FirmClients2	5/9/2016 2:00 PM	Microsoft Office Excel Comma Separated Values Fil
Pictures	FirmContacts	3/10/2016 10:59 AM	Microsoft Office Excel Worksheet
Videos	🚳 matterstoupload	3/10/2016 11:52 AM	Microsoft Office Excel Comma Separated Values Fil
		III	

•	ent	
Found 6 contacts in file. Ma	tch the fields below to begin import.	
A Mapping contain	ns errors	
Field Employer is	mapped 2 times.	
Sample	Column Name	Matched Field
[therek]	TEM	Profix
Im	First Nerve	Final Norma
Handar	Land rooms	Last Permi
[there]	Suffer	Suffex
[biank]	Company	Employer
		Field Employer is mapped 2 times.
[tionik]	Department	Employer
		Field Employer is mapped 2 times.
[there]	Job Title	Job Title
[tionik]	Business Street	Address 1 Line 1

IMPORT MULTIPLE CLIENTS

Import multiple clients to Firm Central using a .csv file. You can create this file by exporting your clients from Microsoft Outlook.

- 1 Click the Contacts tab in the Firm Central header.
- **2** Toggle to the Clients subtab and click the **Import Clients** icon.
- 3 Access the .csv file containing your clients and then click **Open**.
- Before you import all of your clients, Firm Central displays the Import Management page. This page contains three columns:

Sample: The sample data is extracted from the first client row in your file. You can refer to this data when you map the column names from your file to the fields available in Firm Central.

Column Name: The column names are extracted from your file so you can map your column names to the fields available in Firm Central.

Matched Field: Firm Central attempts to match the column names from your file to the fields in Firm Central for you.

- a. Review the fields. If a field does not match your column name, select the appropriate field from the drop-down menu. You cannot match a field to more than one column name.
- b. Click Next.

Note: Firm Central displays an error message if you have matched a field to more than one column name. Correct this error by selecting a new field from the drop-down menu. You can choose *Select* at the top of the menu if you don't want to map the column name to a specific field. After you have corrected the error, click **Next**.

🐟 Back							
1-5015 0 1 0	-		-				import Selecte
	— (b)		C				angon derede
Select All	Il Contacts All	Clients	All Public All Private]	•		
e 🛞 Person	Contact	Public	Active	First Name *	Last Name		
Business	O Client	Private	 Inactive 	Tim	Handler		Import
More Fields							
🖉 🖲 Person		Public	Active	First Name *	Last Name	•	
O Business	O Client	 Private 	Inactive	Kimberly	Jones		Import
More Fields							
🖉 🛞 Person		Public	Active	First Name *	Last Name	•	
Business	O Cilent	Private	Inactive	David	Anderson		Import
More Fields							
 e Person 	Contact	Public	Active	First Name *	Last Name	•	
O Business	O Client	 Private 	Inactive	Mike	Nelson		Import
More Fields							

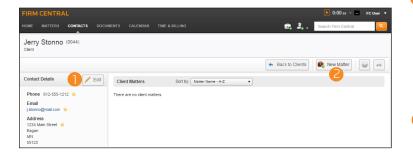
Person @ Contact @ Public @ Active		First Name *			Last Name *		
O Business O Client O Private O Inactive		Kantsety			Jarea		Import
Spouse's/Partner's Name		Prefix	Preferred Name		Middle Name	Suffix	
Employer		· ·					
Building Design							
Job Title		Referred By			Notes		
		Alternate ID					
Website		Alternate ID				1	
Email		Phone			Address		
Hame •	x	Hans •	(812)555-5121	×	Hans •	×	
					State Salact	Country United States •	
					Add Address		
Emergency Contact		Marital Status			Shareholder		
		-Salari		•		4	
Owner		Connection			Date of Marriage		
		-Salact-		•	Enter date (mm/dd/yyyy)		
008		Web Service URL			Mapping File		

- 6 At the Import Management page, Firm Central lists your clients.
- a. Deselect the check box for any entry that you determine you do not want to import.
- b. Select whether an entry is a client or a contact. If all entries are one or the other, click either **All Contacts** or **All Clients**. All clients must be public.
- c. Select whether an entry is private or public. If all entries are one or the other, click **All Public** or **All Private**.

Note: Choose All Private if you do not wish to select the status of each contact at this time (unless you know they are all public). You can edit contact information later to change a private contact to public, but you cannot change a public contact to private.

- d. Click **More Fields** to expand the information for the client. An error message appears if you try to import a client and have filled in a field incorrectly. Edit the data before trying to import again.
- ⁽⁶⁾ The form expands to show all of the fields for that client. If any of the fields contain an error, a message will appear when you attempt to import the client. Edit the data before trying to import again. After you have completed reviewing or editing the client information, click **Fewer Fields** to collapse the fields.
- By default, the check box for each client is selected. Deselect the check box for any client you do not want to import. Click Import All Selected at the top of the page to import all of the selected clients at one time. You can import clients one by one by clicking Import to the right of the client details for each client you want to import.
- After you have reviewed and imported your clients, click Done at the bottom of the page to complete the import process.

9 The Contacts page is displayed.



VIEWING A CLIENT PAGE

When you click on a client's name, you are brought to the Client Profile page. The left column displays contact information for the client, and the right shows the matters they are involved in, if any. This page has several notable functions.

Edit Client Information

1) Click Edit in the Client Details section.

- a. The Edit Client form displays the same fields as the New Client form. Add or edit the information as necessary.
- b. Click Save.

Add a Matter

Click the New Matter button to add a matter for the client to add a matter for this client. The New Matter form will appear. Fill in the appropriate information and click Save.

Add the Client to a Client Group

- Click the More Options icon on the right, and then click Add to Client Group to include this client in a client group.
- a. The Add to Client Group form appears. Select the Client Groups you want to add the client to, and click **Save**.

Deactivate the Client

Click the More Options icon on the right, and then click Deactivate Client. Once you deactivate a client, their information remains saved in Firm Central, but it is not queued when you type their name into fields that call for client and contact information. If the client is deactivated, click Reactivate Client to reactivate the client.

Delete a Client

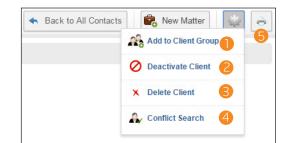
Click the More Options icon on the right, and then click Delete Client. All of their information will be erased from Firm Central. You cannot delete clients if there are open matters associated with them.

Run a Conflict Search

If you are signed on to Firm Central as an Admin, the Conflict Search option is present in the More Options drop-down. Click Conflict Search to initiate a Conflict Search of the client name.

Print Client Information

- Click the Print icon on the far right of the page to print the Client Page. It includes the Contact Details and the matters they are associated with.
- a. The Print Preview window appears. Click **Print** to continue.



Working with Client Groups

Clients can be organized into Client Groups. This is helpful if your client is a larger entity that contains many individuals, such as a family or business. Sort your existing contacts and clients into Client Groups, or create new clients as you create a Client Group.

ient Group Name *		Description	
		200 characters remaining	li li
ontacts & Clients			4 o New Client
Enter contact or client name		Client Group Members	Remove All
Abrams, Ronald	V 🔺	Anderson, Anna	5
Aceves, Anne	\checkmark		
Alam, Ash	1		
Alexander, Lamar	~		
Amara, Janice	\checkmark		
Anderson, Amelia	√		
Anderson, Anna	×		
Anderson, David	√.		

CREATE A CLIENT GROUP

1 Add a client group in one of two ways:

- Click **New Client Group** from the *Contacts* drop-down menu in the banner.
- Click the Contacts tab in the Firm Central header and then click **New Client Group**. You may have to select it from the drop-down menu.
- 2 The New Client Group form appears. You must fill in the *Client Group Name* field. Provide an optional description.
- A list of all clients and contacts is present on the form. Scroll through and click each contact or client you want to add to the Client Group, or search for their name in the *Enter contact or client name* field. Their name will appear in the Client Group Members list on the left. Inactive clients will not appear in the list and cannot be added to client groups.
- Additionally, you can create new clients for the Client Group by clicking **New Client** above the Client Group Members list. Fill in the appropriate information on the New Client form, and click **Save**.
- **(5** To remove a client from the Client Group Members list, click the **Red X** next to their name, or click **Remove All** at the top to remove all clients from the Client Group.

6 Click Save when you are finished adding clients.

FIRM CENTRAL		D:00 ∞ ∨ - FC User ▼
HOME MATTERS CONTACTS DOCUM	ENTS CALENDAR TIME & BILLING	🔩 🤰 Search Firm Central
Play it Again Music		
Client Group Details	Client Matters	Back to Client Groups
Description		
Client Group Members (4) ABC Company Anderson, David "Dave" Baker, Al Bath, Anita		

Back to Client Groups

Rew Matter

X Delete Client Group

🖉 Deactivate Client Group

VIEWING A CLIENT GROUP PAGE

When you click on a client group's name, you are brought to the Client Group Profile page. The left column displays contact information for the client group, and the right shows the matters they are involved in, if any. This page has several notable functions.

Edit a Client Group

Click Edit in the Client Group Details section.

- a. The Edit Client Group form displays the same fields as the New Client Group form. Add or edit the information as necessary.
- b. Click Save.

Add a Matter

Click the New Matter button to add a matter for the client group. The New Matter form will appear. Fill in the appropriate information and click Save.

Deactivate the Client Group

Click the More Options icon on the right, and then click Deactivate Client Group. Once you deactivate a client group, the information is not queued when you type the group into fields that call for client group information. If the client group is deactivated, click Reactivate Client Group to reactivate the client group.

Delete a Client

Click the More Options button on the right, and then click Delete Client Group. All of the information will be erased from Firm Central. The information of the clients in the client group will not be deleted, only the client group itself.

LOOKING FOR MORE INFORMATION?

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

 $\label{eq:constraint} For free \ reference \ materials, visit \ http://legalsolutions.thomsonreuters.com/law-products/solutions/firm-central/support$

© 2016 Thomson Reuters S-035322/5-16 The trademarks used herein are the trademarks of their respective owners. West trademarks are owned by West Publishing Corporation.

The intelligence, technology and human expertise you need to find trusted answers.



the answer company™ THOMSON REUTERS®