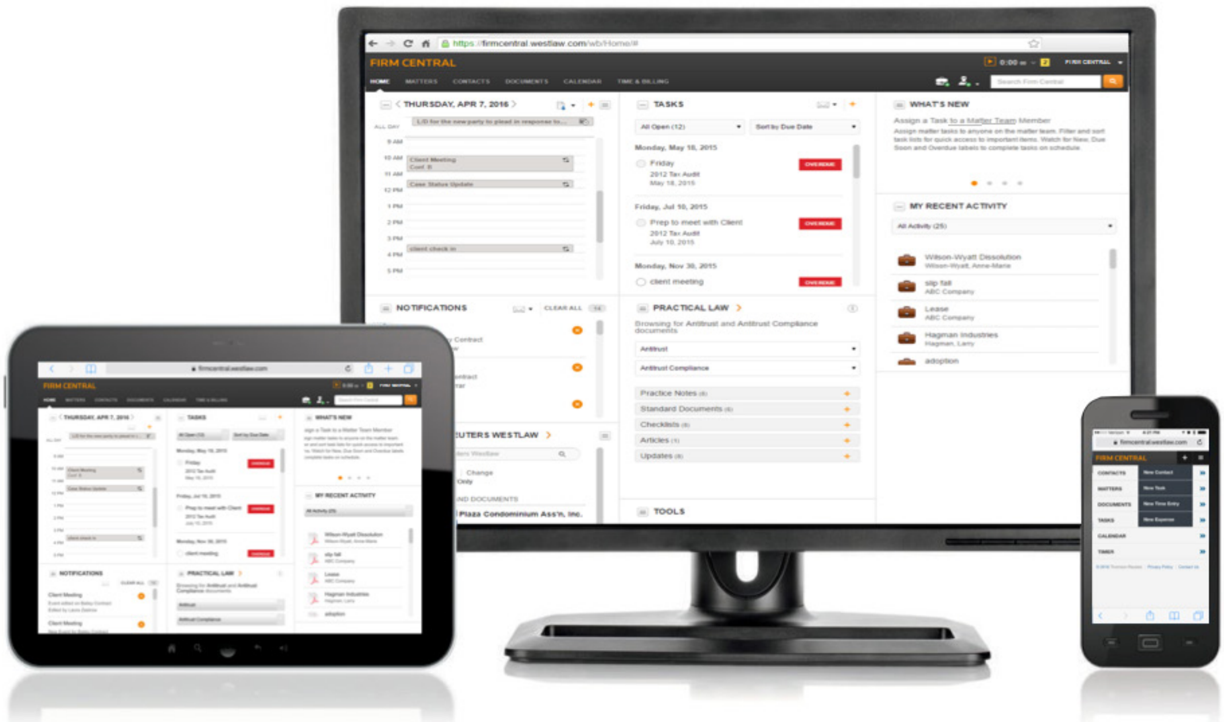

FIRM CENTRAL

WORKING WITH CONTACTS AND CLIENTS GUIDE

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you need to find trusted answers.

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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

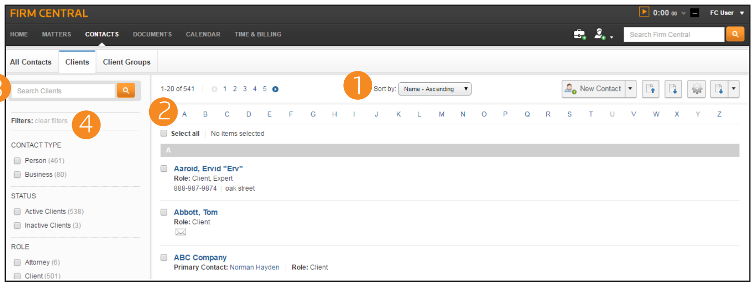
Customer Support
1-888-287-8537

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

http://legalsolutions.thomsonreuters.com/law-products/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.

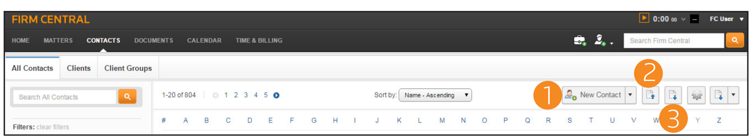


FILTER A CONTACT LIST

1. 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.
3. 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.
4. 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

1. 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

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

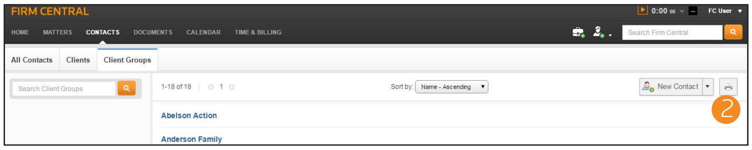
EXPORT CONTACTS FROM FIRM CENTRAL

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.

3. 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.

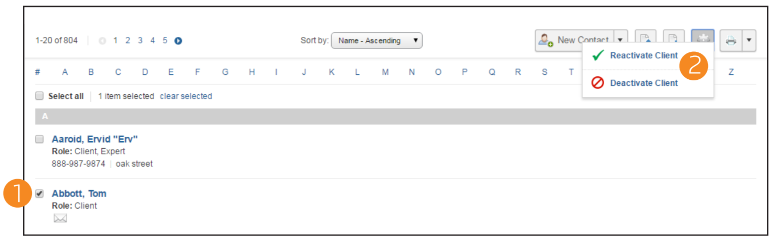
b. The list of contacts includes both contacts and clients and identifies each entry accordingly.



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.

2 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.

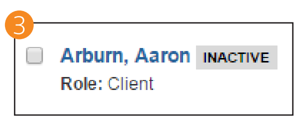


DEACTIVATE OR REACTIVATE A CONTACT

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.

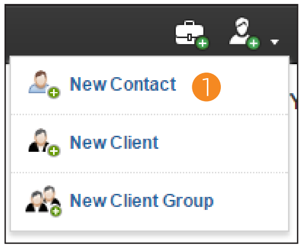
1 Select the contacts you want to deactivate by selecting the check box preceding each entry. Select the *Select All* check box at the top of the list to select all entries.

2 Click the **More Options** icon, and then click **Deactivate** to deactivate the clients and contacts or click **Reactivate** to return them to Active status.



3 When a contact or client is deactivated, an INACTIVE icon will appear next to their name in the list.

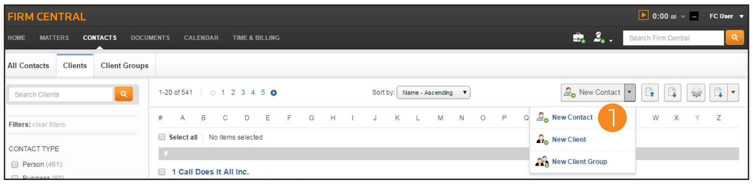
Working with Contacts



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.



2 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.

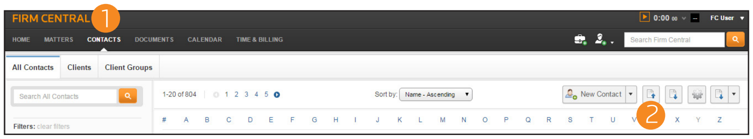
3 You must fill in the *First Name* and *Last Name* fields. All other information is optional. You can edit this information later.

4 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*.

5 Click **Save**.

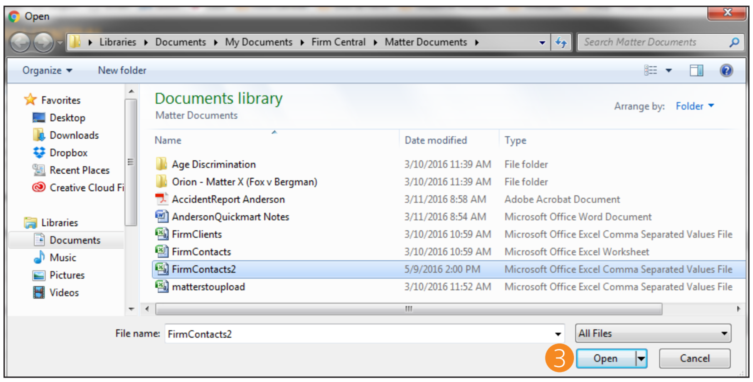
IMPORT MULTIPLE CONTACTS

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

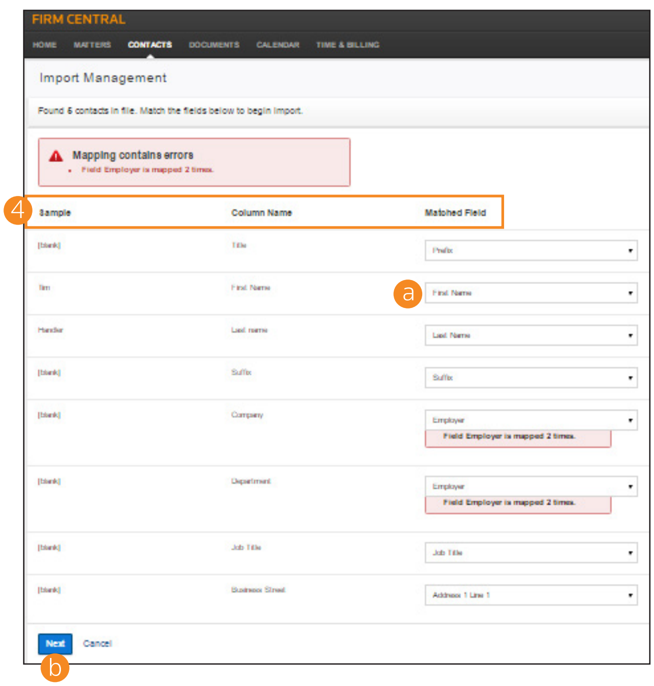


1 Click the Contacts tab in the Firm Central header.

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.

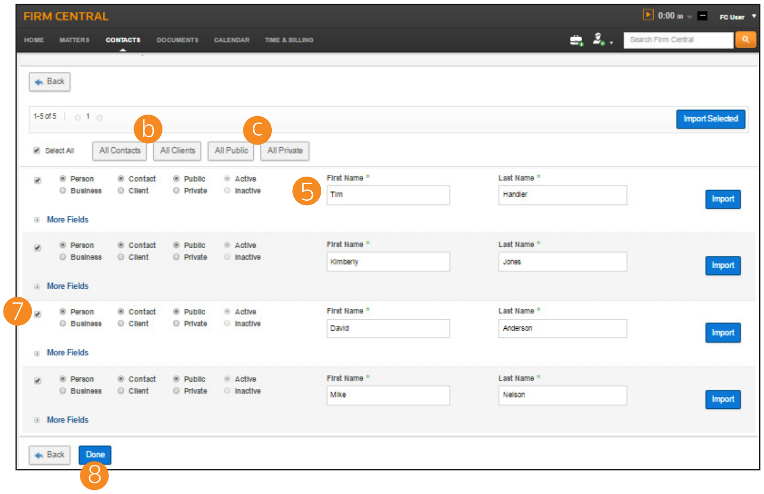
Column Name: The column names are extracted from your file so you can map your column names to the fields available in Firm Central.

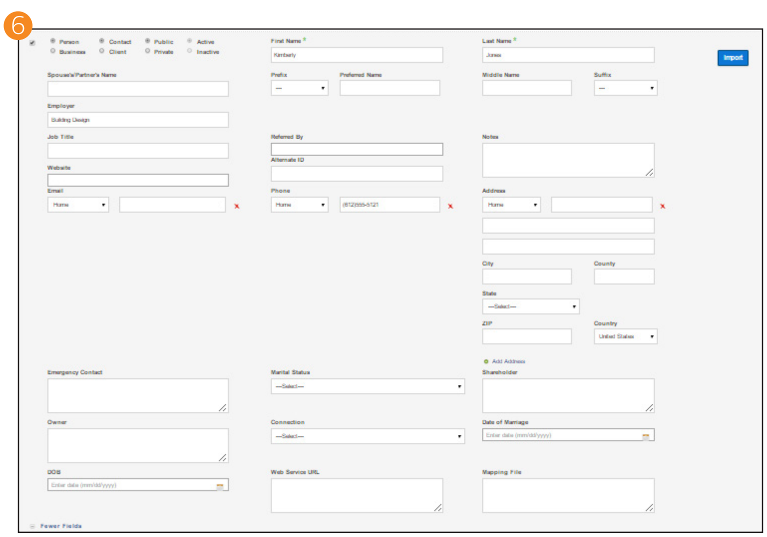
Matched Field: Firm Central attempts to match the column names from your file to the fields in Firm Central for you.

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 specfic field. After you have corrected the error, click **Next**.





5 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.

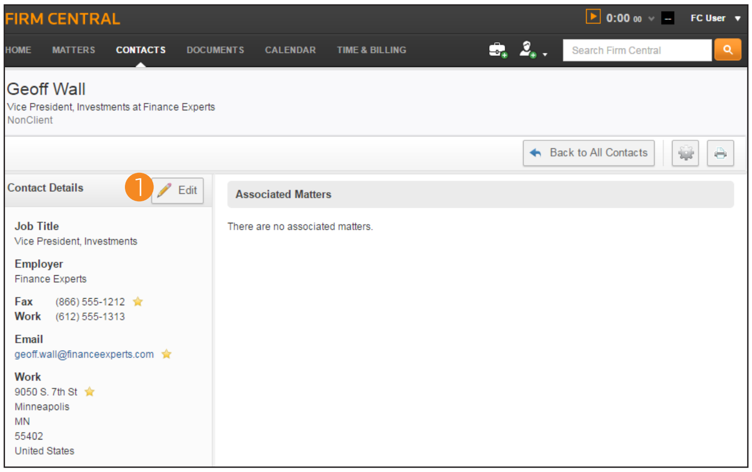
d. Click **More Fields** to expand the information for the contact. An error message appears if you try to import a contact and have filled in a field incorrectly. Edit the data before trying to import again.

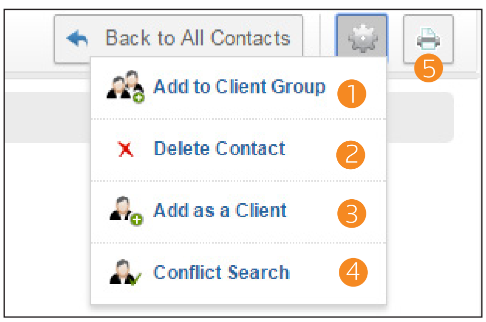
6 The form expands to show all of the fields for that contact. If any of the fields contain an error, a message will appear when you attempt to import the contact. Edit the data before trying to import again. After you have completed reviewing or editing the contact information, click **Fewer Fields** to collapse the fields.

7 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.





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

1 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

2 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

3 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

4 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

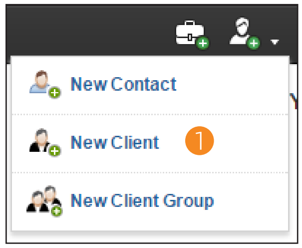
Export Contacts into a .csv File from Microsoft Outlook 2010 and 2013

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.

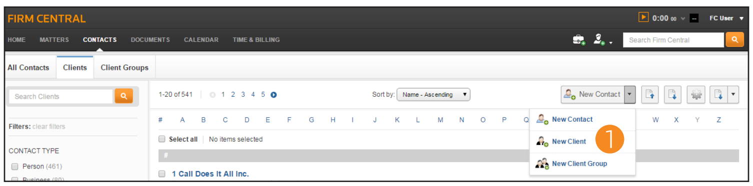
Working with Clients

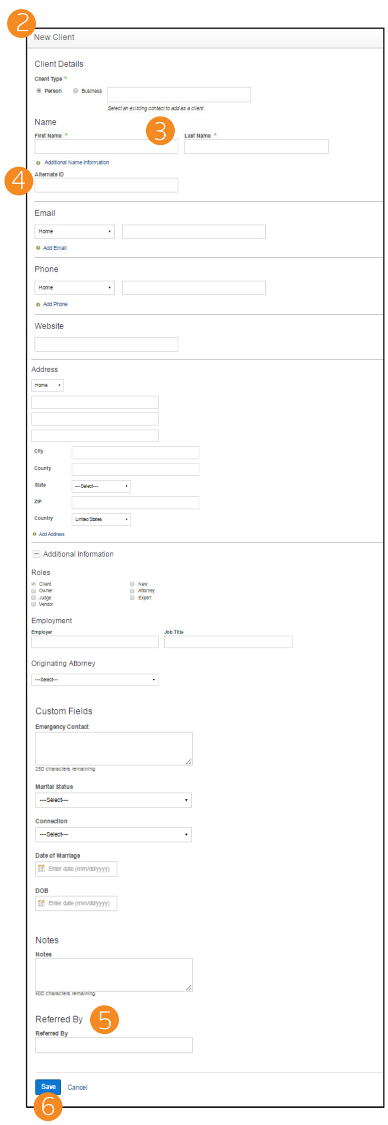


ADD A CLIENT

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.





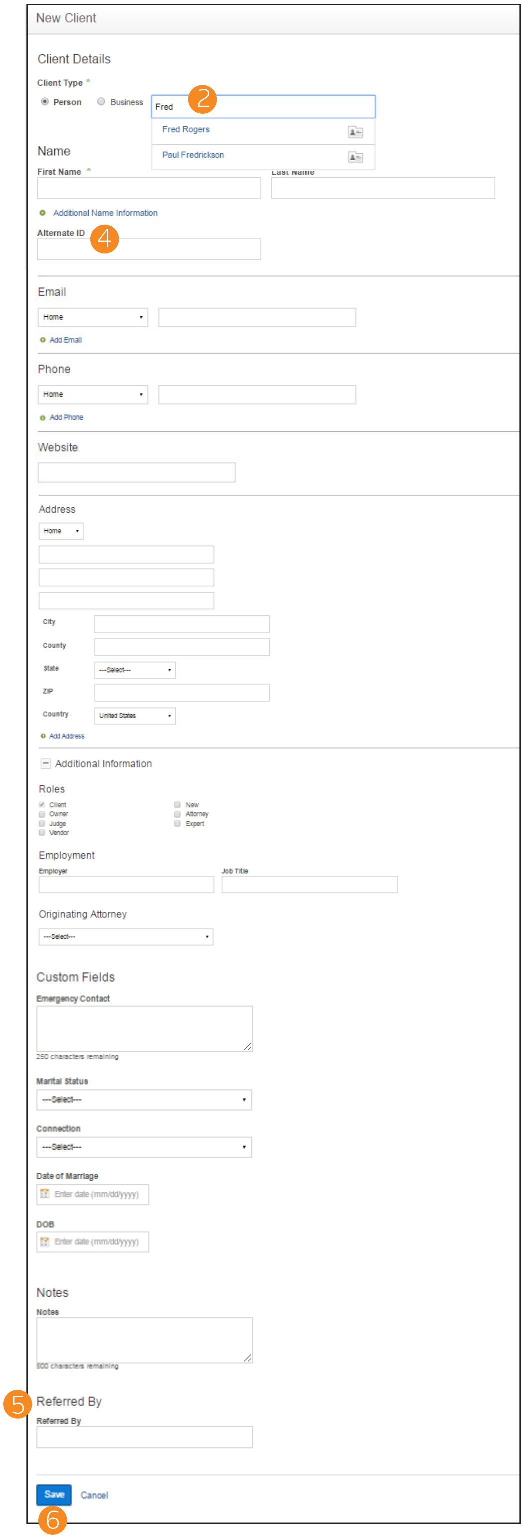
2 The New Client form is displayed. You must specify whether the client is a person or a business.

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

4 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**.



CONVERT A CONTACT TO A CLIENT

1 Convert a contact to a client by adding a client in one of two ways.

- Click **New Client** from the Contacts drop-down menu in the 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 Enter the client's name in the *Select an existing contact to add as a client.* field at the top of the New Client form. As you type, Firm Central will display a list of matching contacts. Click the name of the contact you want to convert to a client.

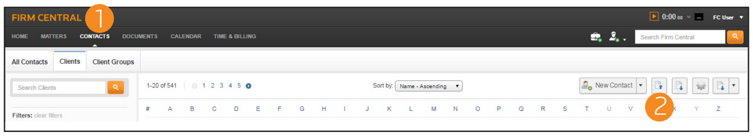
3 Firm Central automatically populates the fields with your contact's information.

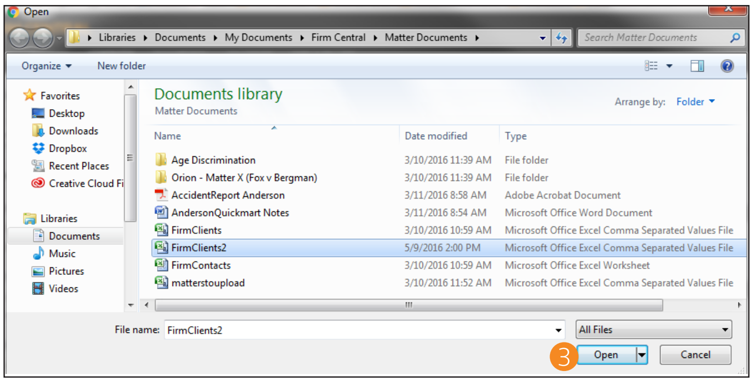
4 Firm Central automatically assigns a number to each of your new clients. You have the option to include an alternative ID for this client using the numbering system your firm uses to identify clients. If you do so, this alternative ID will display on the client profile screen, rather than the ID generated by Firm Central.

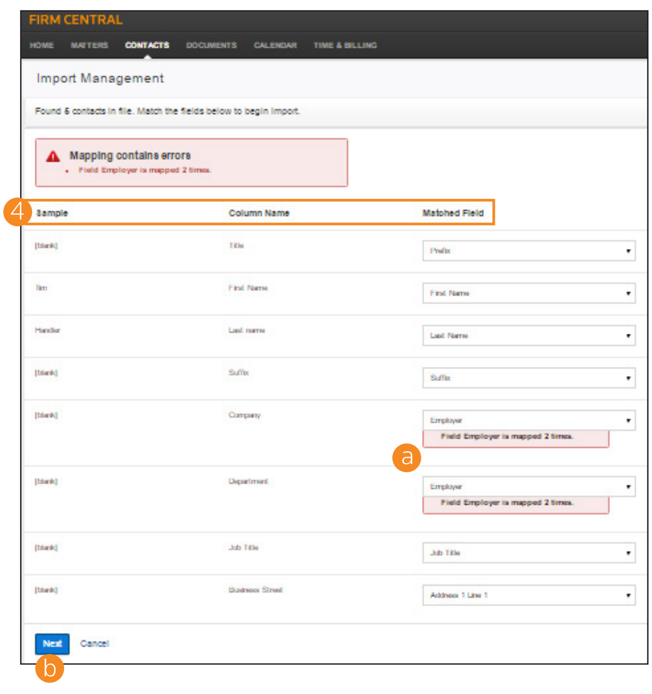
5 You have the option to include the person who referred this client to you.

6 Click **Save**.

Note: All clients are public, so if your contact was private, it will become public when converted to a client.







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**.

4 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.

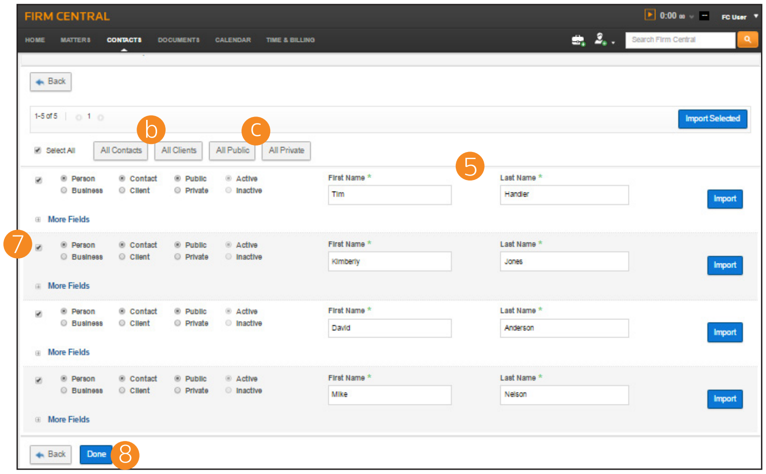
Column Name: The column names are extracted from your file so you can map your column names to the fields available in Firm Central.

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 specfic field. After you have corrected the error, click **Next**.



5 At the Import Management page, Firm Central lists your clients.

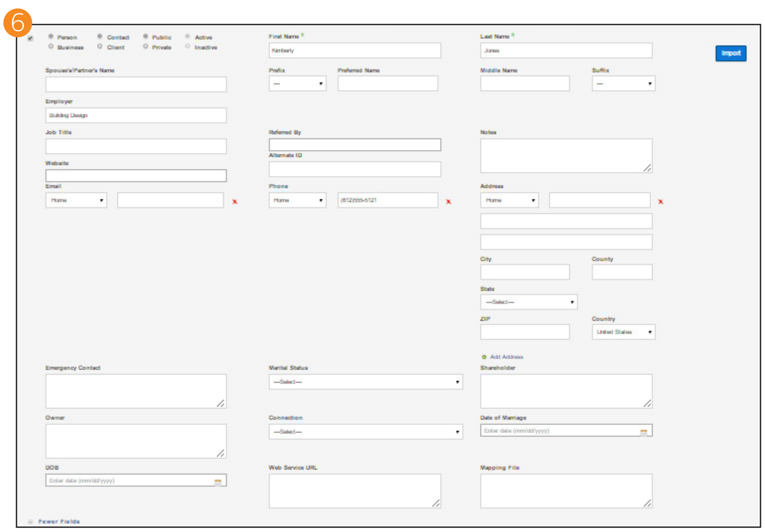
a. Deselect the check box for any entry that you determine you do not want to import.

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.

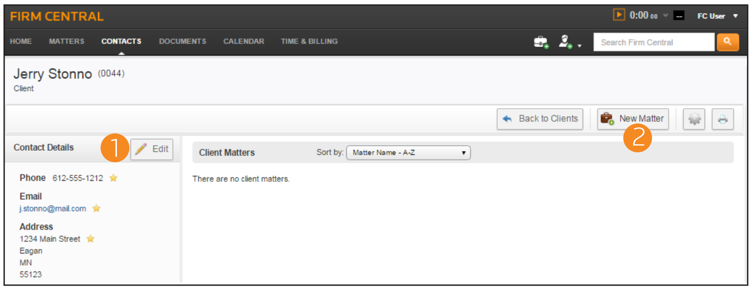
7 By default, the check box for each client is selected. Deselect the check box for any client you do not want to import. Click **Import All Selected** at the top of the page to import all of the selected clients at one time. You can import clients one by one by clicking **Import** to the right of the client details for each client you want to import.

8 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

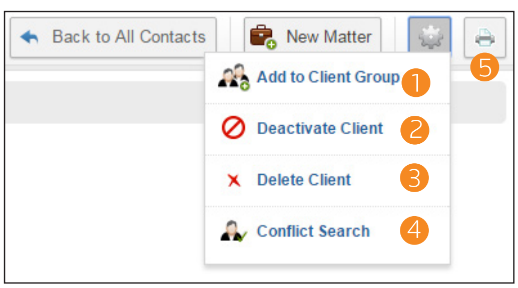
1 Click **Edit** in the Client Details section.

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

2 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

1 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

2 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

3 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

4 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.

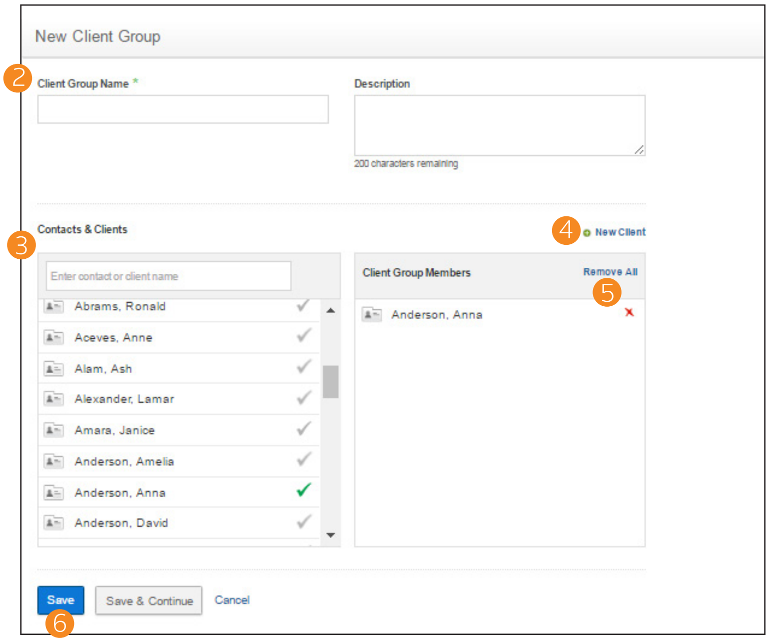
Print Client Information

5 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.



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.

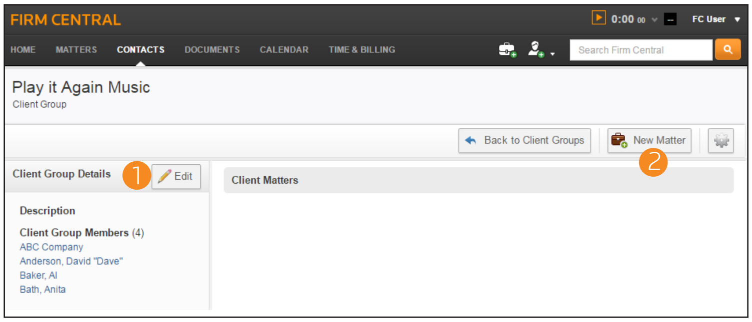
2 The New Client Group form appears. You must fill in the *Client Group Name* field. Provide an optional description.

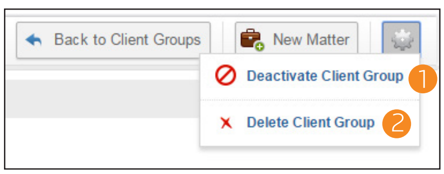
3 A list of all clients and contacts is present on the form. Scroll through and click each contact or client you want to add to the Client Group, or search for their name in the *Enter contact or client name* field. Their name will appear in the Client Group Members list on the left. Inactive clients will not appear in the list and cannot be added to client groups.

4 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.





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

1 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

2 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

1 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

2 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

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