









































WHAT TO EXPECT DURING THE Firm Central Data and Accounting Migration Process

Scenario You have informed your Thomson Reuters Firm Central® account manager and/or on-boarding team that you have preexisting contacts, clients, and matters that include sensitive information with a second-party practice management system and you want to move that information into Firm Central.

Which data sets are supported?

	Supported	Unsupported	
Client Information	<ul style="list-style-type: none">  Client Name  Client Number  Employer  Job Title  Address  Phone  Email 	<ul style="list-style-type: none">  Website  Primary Contact  Spouse/Partner  Doing Business As  Referred By  Notes (500 characters)  10 Custom 	<ul style="list-style-type: none">  Client Documents  Tasks  Calendar Meetings  Associated Parties
Matter Information	<ul style="list-style-type: none">  Client Name  Matter Number  Matter Name  Matter Status  Practice Area  Case Type  Description  Matter Outstanding Balance  Court Location 	<ul style="list-style-type: none">  Docket Number  Lead Attorney  Billing Contact  Statute of Limitations  Notes (1000 characters)  10 Custom  Last Invoice Date  123818 Last Invoice Number  Billing Type 	<ul style="list-style-type: none">  Invoice Statements  Court Documents  Court Meetings  Templates  Time Entries

5 Phases of Firm Central Data Migration

Phase 1

- Introductions
- Waiver
- Initial Review

Phase 2

- Data Cleanup
- Data Finalization
- Data Confirmation
- Customer Approval

Phase 3

- Data Review
- Sample Import
- Customer Approval

Phase 4

- Full Data Import
- Customer Review
- Customer Confirmation

Phase 5

- Accounting – Chart of Accounts

Questions? Call 1-888-287-8537.

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



the answer company™
THOMSON REUTERS®