



FIRM CENTRAL

GET SET UP.
GET STARTED.
GET TO WORK.

Welcome
to the new
center of your
workday.

FIRM CENTRAL

SUPPORT

WHATEVER
HELP YOU NEED.
WHENEVER
YOU NEED IT.



the answer company™

THOMSON REUTERS®

Firm Central® Support

1-888-287-8537

legalsolutions.tr.com/law-products/solutions/firm-central/support

Online Video Help

firmcentral.com/videos

**HERE'S ANOTHER WAY TO GET
ATTACHED TO FIRM CENTRAL.**

This magnet has all of the contact information you'll ever need to make sure you get the most out of Firm Central.

WELCOME TO FIRM CENTRAL.

You've made a great decision to make Firm Central® the center of your workday. It's the ideal practice management tool for solo and small law firms to accomplish more for your clients with less effort and stress.

Everything you need in one convenient location

Firm Central simplifies every workday by providing one online location where you can access the information and tools you need to manage your firm.

Your practice will run more efficiently. You'll be able to more easily track your time, create invoices, and process payments. All of your documents and data will be available where and when you need them. Everything will be fully integrated to make your workflow seamless and a whole lot easier.

It's easy to get started

1. Once you've received your **Firm Central Welcome Email**, you can use the quick, easy guide starting on page 5 to get set up and ready to work. (Remember, Firm Central integrates what you do for a client and what you do to run your practice, so it needs to be populated with the right information and have the right tools accessible.)
2. Your Thomson Reuters Sales Consultant will set up an appointment with one of our Project Managers to help you with the following:
 - Register your OnePass
 - Install your Desktop Integration Plug-In (PC users)
 - Create Matters
 - Create Contacts
 - Create Clients
 - Upload documents, including drag and drop
 - Integrate with Thomson Reuters Westlaw™, Westlaw® Form Builder, and Drafting Assistant (where applicable)
3. Turn the page to find out how Firm Central integrates the products you use every day and where to go if you ever have questions.



EASY TO CONNECT

EVERYTHING YOU NEED WITH MORE CLARITY AND LESS CLUTTER.

Firm Central Suite

No other practice management system for solo and small law firms connects your legal practice and business operations like Firm Central. It's designed to let you choose and connect to industry-leading platforms and programs from Thomson Reuters that help you manage your practice and your business.

Time & Billing

Track and record every billable minute of your day, even when you're offline, and present clients with well-documented invoices. Enter time with preloaded ABA billing codes or customized codes. Provide clients with complete, firm-branded invoices.

Custom Forms

Custom Forms is a word processor tool that lets you customize, build, and save your firm's forms directly into Westlaw Doc & Form Builder. Custom Forms can also be shared through the secure Firm Central Client Portal.

Deadline Assistant

Deadline Assistant calculates your litigation deadlines for your matters based on applicable federal, state, and local court rules – then adds the information directly to your Firm Central calendar and your Microsoft Outlook calendar view. It provides firm-wide access so the whole team stays informed, and sends automatic alerts via email if any changes occur to the rule set governing your matter. You can also customize matter deadlines by editing dates, renaming events, adding notes, and removing events from the calendar display.

Microsoft® Outlook® and Windows® Explorer

You'll be able to easily access your emails and contacts, calendar, and notes, and organize them with the relevant clients and matters.

Seamlessly integrate with other Thomson Reuters solutions:

Connect to Westlaw

Westlaw is the world's premier online legal research platform. Legal professionals around the world rely on it every day to deliver better research results, faster. Westlaw is built on more than 125 years of proprietary legal analysis and the power of the unequalled WestSearch® legal search engine. You can even make a Westlaw practice area page your "default start page," which makes life easier if you often search only specific information on that practice area.

Connect to Westlaw Doc & Form Builder

It's easy to automate form building with Westlaw Doc & Form Builder. This program is a convenient online document assembly tool that helps you complete your forms faster. Client data can be saved to reuse for additional forms. Plus, you have no-charge linking to cited statutory and analytical content on Westlaw. Westlaw Doc & Form Builder uses forms from familiar, trusted sources that are updated automatically, so you always have the most current versions.

Connect to Drafting Assistant

You can save hours of drafting and review time by using Drafting Assistant. All of the tools you need are right in your word processor, so the process is easy and intuitive. Litigators can easily check citations and compile authority, while transactional attorneys can quickly identify drafting errors, inconsistencies, and missing information.

Connect to Practical Law

Practical Law™ goes beyond legal research and delivers the know-how to help you interpret and apply law more quickly. Its comprehensive content is created with front-line lawyers in mind, offering the concise, up-to-date resources needed to practice more efficiently, improve client service, and grow your practice. Our team of over 130 expert attorney-editors, who have worked at the world's leading law firms and in-house departments, create and maintain resources such as standard documents and clauses, checklists, and practice notes

EASY TO GET SUPPORT

WHATEVER HELP YOU NEED. WHENEVER YOU NEED IT.

Firm Central Support

Firm Central customers have 24/7 access to online training, downloads, research assistance (for Westlaw customers), and technical support at no extra charge.

Software downloads, including updates, are available to help you integrate Microsoft Outlook and Windows Explorer with Firm Central.

Firm Central **online training and webinars** give you step-by-step instructions to help you get the most out of your workday.

Our **online videos** provide a wide range of easy-to-access information on all things Firm Central, from how you can integrate all of the tools you use every day to specifics on how your client and practice documents integrate into Firm Central.

Thomson Reuters **Reference Attorneys** can help you get better results, faster. Every Reference Attorney is a licensed attorney and online research expert with a deep understanding of Westlaw features, functionality, databases, and other Firm Central integration services.

Firm Central Product Support

1-888-287-8537

Specialists are available 24/7, every day of the year.

Firm Central Downloads

Download the latest version of the PC Desktop Plug-In at firmcentral.com/support.

Online Video Help

Access short how-to videos at firmcentral.com/videos.

Reference Attorney Assistance

1-800-REF-ATTY

Knowledgeable, 24/7 research assistance.

CUSTOMIZE YOUR HOMEPAGE TO MAXIMIZE YOUR WORKFLOW.

Drag and drop widgets, delete widgets, and choose between a white or dark color scheme.

NEVER MISS A DEADLINE OR FORGET A TASK.

Your **to-do list** and **notifications** are displayed prominently, so you won't overlook anything.

TRACK YOUR TIME AND EXPENSES.

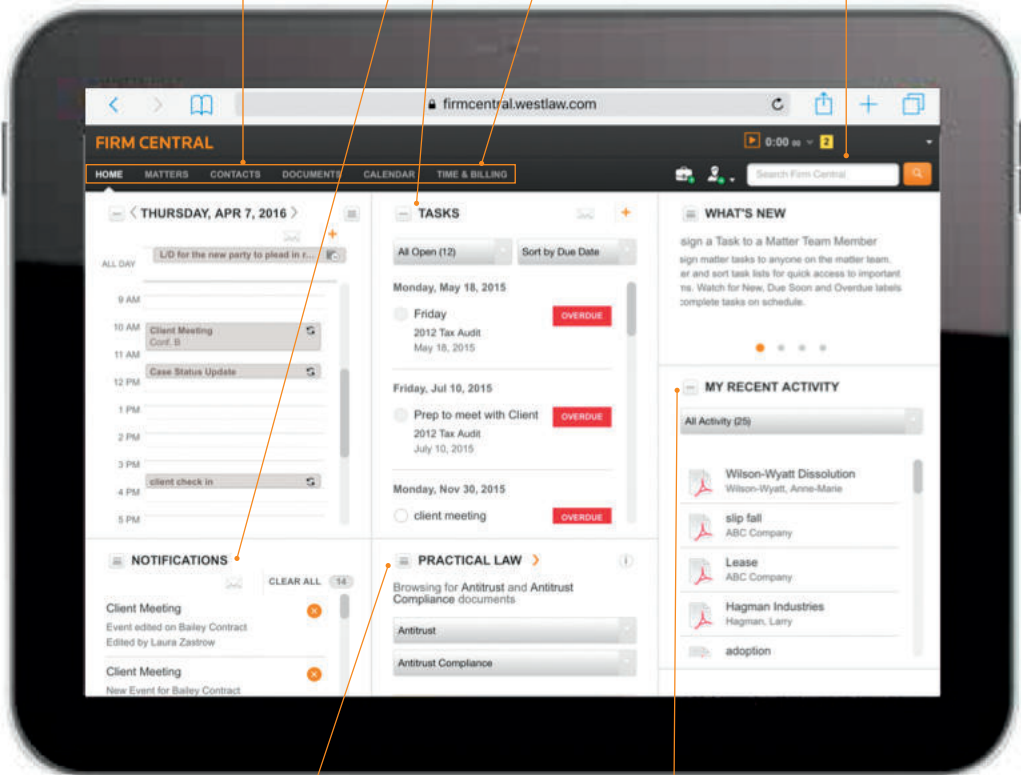
Firm Central **Time & Billing** allows you to keep track of time spent on matters, create invoices, and easily organize your firm's billables.

CLICK A TAB AND ZERO IN.

When you know the type of content you need, the **Matters, Contacts, Documents, and Calendar** tabs will deliver it in a flash.

SAVE TIME BUT STILL FIND EVERYTHING.

Firm Central's **Global Search** bridges the gaps among various types of information, delivering complete results with a single query.



SMOOTH YOUR WORKFLOW BY BLENDING ALL OF YOUR ELECTRONIC INFORMATION.

Sign in once to Firm Central, and you're automatically signed in to client and matter files and any other Thomson Reuters' legal solution you subscribe to, including **Westlaw, Westlaw Doc and Form Builder, and Practical Law.**

RETRACE YOUR STEPS AND RESUME WORK WITH EASE.

When appointments, emails, phone calls, and other interruptions break your concentration, **Recent Activity** on the homepage and **Recent Documents** on a Matter page get you back on track quickly.

EASY TO GET STARTED

THE QUICK WAY TO PUT THE CENTER OF YOUR WORKDAY TO WORK.

The Firm Central Quick Start Guide

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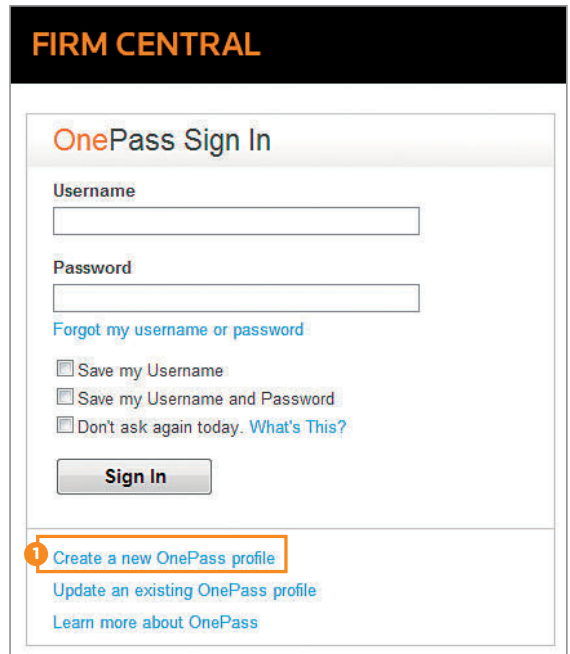
ONEPASS

Adding your Firm Central Registration Key to OnePass

After you are added as a Firm Central user, you will receive an email with a registration key that gives you access to Firm Central. You must enter this registration key into your OnePass profile. You can use the link provided in the email or you can use the links provided on the Firm Central sign-in page.

Create a OnePass profile

- 1 If you have never set up a OnePass profile, click **Create a new OnePass profile** at the bottom of the OnePass Sign-In screen.
 - Enter your Firm Central registration key in the *registration key* text boxes.
 - Enter a name for this registration key so you can easily distinguish it from other products, e.g., My Firm Central.
 - Enter the email address where your Firm Central registration key was sent.
 - Click **Continue**.
 - Fill in the form on the General Settings page with your information. Create a OnePass username and password for yourself following the requirements that appear on the page. Choose a security question that you can answer in the event you need to reset your password.
 - Click **Create Profile**.
 - A message confirming your successful registration appears. Additional OnePass features appear on the left of the page, allowing you to manage your products and electronic payments. Click **Return to Thomson Reuters Firm Central** to sign on to Firm Central with your new OnePass username and password.
 - At the OnePass Sign-In page, enter your OnePass username and password and click **Sign In**. You can select options to save your username and password. Do not select these options if you are working on a shared computer.



ONEPASS (CONTINUED)

Update an existing OnePass profile

- 1 If you have a OnePass profile already, click **Update an existing OnePass profile** at the bottom of the OnePass Sign-In screen.
 - Enter your OnePass username and password at the *manage onepass* section and then click **Sign In**.
 - At the OnePass General Settings page, click **Manage Products**.
 - Click **Add a new Registration Key**.
 - Enter your Firm Central registration key in the *registration key* text boxes.
 - Enter a name for this registration key so you can easily distinguish it from other products, e.g., **My Firm Central**.
 - Select the check box for *Preferred* if you want this registration key to be preselected if prompted for a registration key during the sign-on process. (The friendly name you selected is displayed at that time.)
 - Click **Save**.
 - Click **Return to Thomson Reuters Firm Central**.
 - At the OnePass Sign-In page, enter your OnePass username and password and click **Sign In**. You can select options to save your username and password. Do not select these options if you are working on a shared computer.

FIRM CENTRAL

OnePass Sign In

Username

Password

[Forgot my username or password](#)

Save my Username

Save my Username and Password

Don't ask again today. [What's This?](#)

Sign In

[Create a new OnePass profile](#)

1 [Update an existing OnePass profile](#)

[Learn more about OnePass](#)

BEING AN ADMINISTRATOR

Firm Central users designated as Administrators

The Firm Administrator has full access to all matters, contacts, clients, and documents in Firm Central. Additionally, the Firm Administrator can create the Default Permission list for firm users, designate a storage notification limit, set up either the Outlook or Firm Central calendar for the firm – and is the only person in the firm with the ability to permanently empty the Recycle Bin. (Emptying the Recycle Bin can help reduce unwanted storage usage.)

You are encouraged to have more than one Firm Administrator for Firm Central. In the event an Administrator leaves the firm, the remaining Administrator will continue to have access to all matters, contacts, clients, and documents. The Administrator can be a regular user of Firm Central and has the ability to sign in and work as either a user or the Administrator. The Firm Administrator(s) should be designated when your firm first begins using Firm Central and can be changed by going to My Account.

Sign in as Administrator

- 1 Click the **drop-down arrow** to the right of your name.
- 2 Click **Admin**.
- 3 The Administration page is displayed.

Conflict Checking – You must be signed in to Firm Central as an Administrator to use the Conflict Checking feature. This allows you to search all content on the site, other than private contacts, for references to a person or business, then create a report from the result.

Firm User Management – You can add users to all or multiple matters, designate their role, set their permissions, set their default rates, and add them to a matter team (optional). Inactive users who have left the firm are displayed here and you have the ability to delete them if you like. Use My Account tab, which will open up a new browser to add or delete users and administrative permissions.

Customization allows you to change the custom fields in new matters and contacts as well as set user rates and Time & Billing permissions.

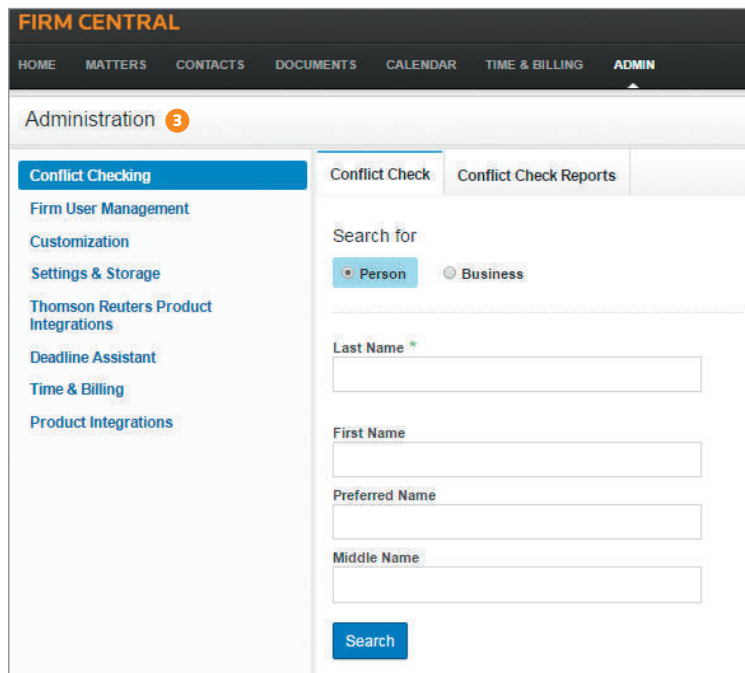
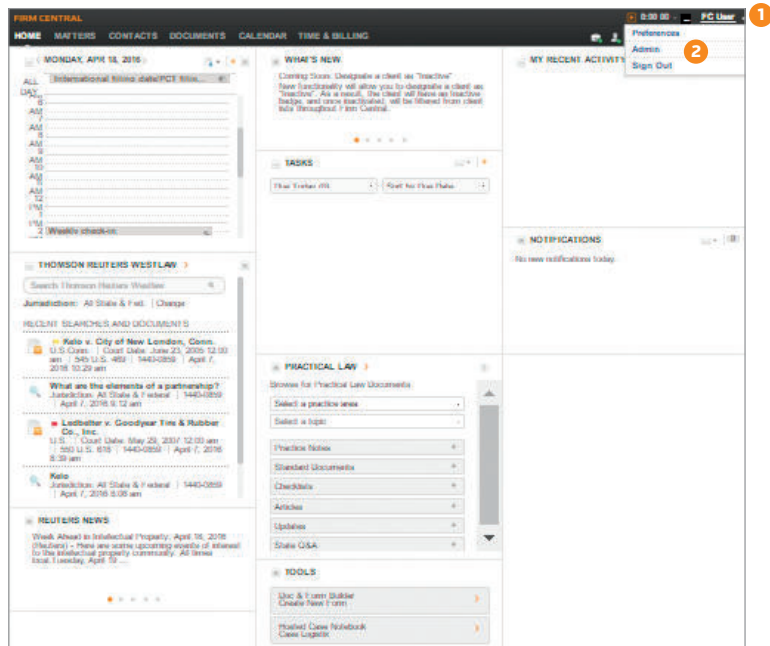
Settings – The Storage section in Settings shows you the available space for your documents. Select the checkbox to receive an alert to be notified when the storage amount reaches a specified percent of capacity.

Deadline Assistant lets you create automated deadlines for your litigation matters based upon applicable state and federal court rules governing your jurisdiction.

Time & Billing – You can select and customize activity and expense codes, set payment terms, establish invoice settings and templates, and establish firm time entry intervals.

Thomson Reuters Product Integrations – You can select the checkbox to display a link to Hosted Case Notebook™ and Case Logistix® on your Firm Central homepage, if your firm has a subscription to these products

ADMINISTRATORS (CONTINUED)



CREATE A CONTACT

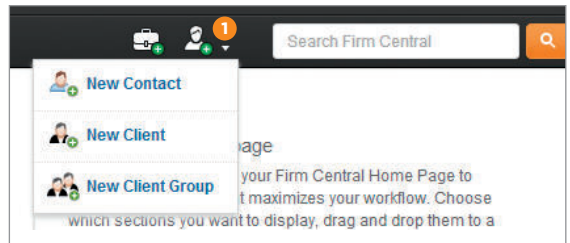
Add a single contact one of two ways

- 1 Click the **Contacts icon** in the Firm Central header. Choose **New Contact** from the drop-down menu.
- 2 Click the **Contacts tab** in the Firm Central header and then click **New Contact**.

The New Contact form allows you to specify whether the contact is a person or a business and provides options for classifying the contact by type, such as prospective client or lawyer.

NOTE: You can filter your contacts by individual/business and role type. You must fill in the First Name and Last Name fields. All other information is optional. You can edit this information later.

- 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.
- Click **Save**.

A screenshot of the 'New Contact' form in Firm Central. The form is titled 'New Contact' and is located under the 'CONTACTS' tab in the header. The form is divided into several sections: 'Contact Details', 'Email', 'Phone', 'Website', 'Address', and 'Additional Information'. The 'Contact Details' section includes a 'Contact Type' dropdown menu with 'Person' and 'Business' options, and 'Name' fields for 'First Name' and 'Last Name'. The 'Email' section has a 'Name' dropdown and an email address field. The 'Phone' section has a 'Name' dropdown and a phone number field. The 'Website' section has a text input field. The 'Address' section has a 'Home' dropdown, a street address field, a city field, a county field, a state dropdown, a ZIP field, and a country dropdown. The 'Additional Information' section has a 'Public' radio button (selected) and a 'Private' radio button. At the bottom of the form are 'Save' and 'Cancel' buttons. A red circle with the number '2' is positioned to the left of the form.

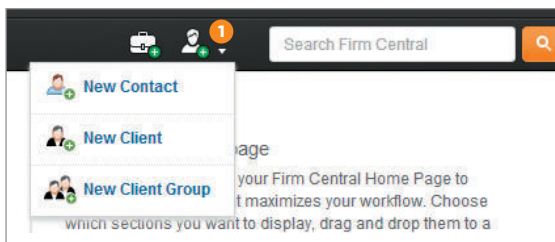
CREATE A CLIENT

Add a single client one of two ways

- 1 Click the **Contacts icon** in the Firm Central header. Choose **New Client** from the drop-down menu.
- 2 Click the **Contacts tab** in the Firm Central header, then click **New Client**.

The New Client form is displayed. Specify whether the contact 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 method your firm uses to identify clients.
- You have the option to include the name of the person who referred this client to you.
- Click **Save**.



 A screenshot of the 'New Client' form in the Firm Central application. The form is titled 'New Client' and is located under the 'CONTACTS' tab in the header. The form is divided into several sections:

- Client Details:** Includes a 'Client Type' dropdown menu with 'Person' and 'Business' options. Below it is a text field for 'Select an existing contact to add as a client.'
- Name:** Includes 'First Name' and 'Last Name' text fields.
- Additional Name Information:** Includes an 'Alternate ID' text field.
- Email:** Includes a dropdown menu for 'Name' and a text field for the email address. Below it is an 'Add Email' button.
- Phone:** Includes a dropdown menu for 'Name' and a text field for the phone number. Below it is an 'Add Phone' button.
- Website:** Includes a text field.
- Address:** Includes a dropdown menu for 'Name' and three text fields for the address.
- City:** Includes a text field.
- County:** Includes a text field.
- State:** Includes a dropdown menu.
- ZIP:** Includes a text field.
- Country:** Includes a dropdown menu.
- Additional Information:** Includes a text field.

 At the bottom of the form, there are 'Save' and 'Cancel' buttons. A red circle with the number '2' is placed over the 'New Client' option in the header.

CREATE A MATTER

Add a single matter in one of three ways

- 1 Click the **Add Matter icon** in the Firm Central header.
- 2 Click the **Matters tab** in the Firm Central header, then click **New Matter**.
- 3 From the page for a specific client, click **New Matter**.

The New Matter form includes six sections: Matter Details, Matter Description, Billing Information, Court Information, Custom Fields, and Matter Team. You can include as much detail as you wish. You can edit the matter at another time to fill in optional information.

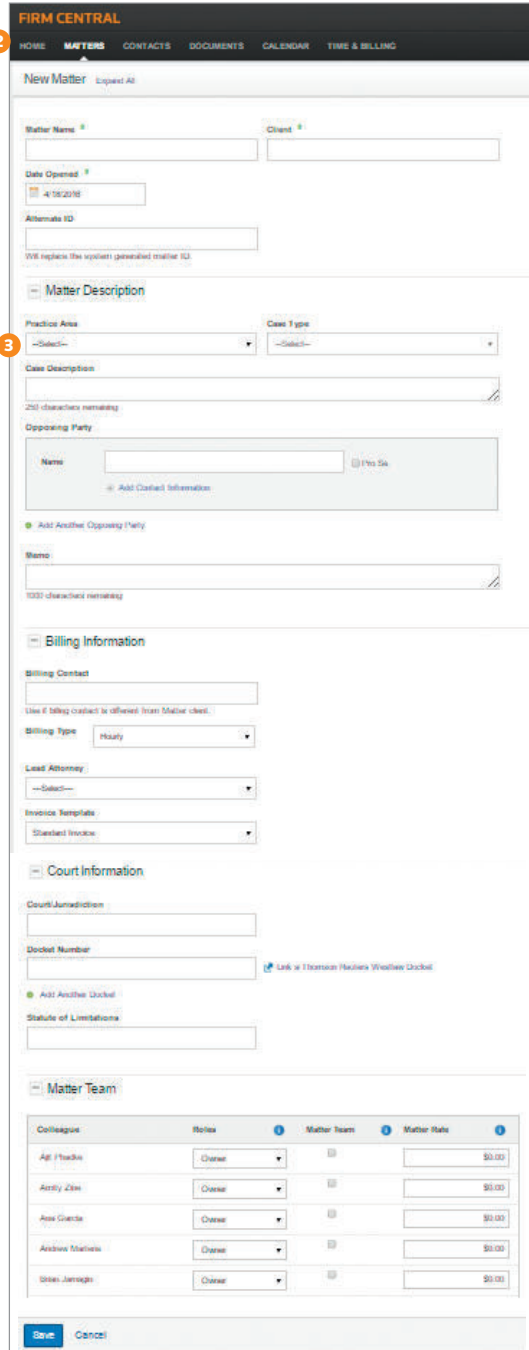
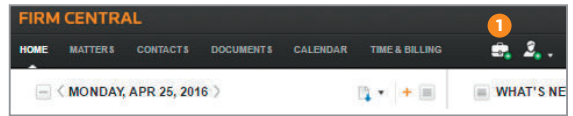
Matter Details

- Fill in a Matter Name.
- Fill in the Date Opened. It defaults to today's date. If you want to change the date, you can use the Calendar icon.
- Enter a client. As you type the client's name, Firm Central displays a list of suggestions in a drop-down menu. Click the client's name from this list. If this client is not an existing client, click **Create a New Client** from the drop-down list, then fill in the Create New Client form with at least the client's first and last name or business name. You can also convert an existing contact into a client at the Create New Client form.
- Firm Central automatically assigns a Matter ID for each new matter created. You have the option to include an Alternate ID for this matter using the method your firm uses to identify matters.

Matter Description (optional)

Select a practice area from the drop-down menu.

- 4 **Best Practice Tip:** You can search and filter your matters by practice area. Remember to always fill in this field for a complete display of matters by practice.
- If the practice area you selected has a case type, select the case type from the drop-down menu. For example, Intellectual Property has the case types Patents, Copyright, or Trademarks.
 - Enter a description of the case. This field is also searchable.
 - Enter opposing party contact information.



CREATE A MATTER (CONTINUED)

Billing Information (optional)

Note: Only the Billing Type field will be displayed unless you subscribe to Firm Central Time & Billing.

- Enter the billing contact for the Client.
- Select the billing type for the matter.

Note: depending on the billing type selected additional fields may be generated (e.g., selecting Contingency will generate additional fields including Firm Percentage, Settlement Amount, etc)

- Designate the lead attorney for the Matter.
- Select an invoice template to use for the Matter.
- Indicate whether a Matter has a trust account.

Note: selecting the trust account checkbox will generate additional fields including trust account name, opening balance, etc.

Court Information (optional)

- Enter the court or jurisdiction for this matter.
- Enter the docket number.
- Enter the statute of limitations.

Matter Permissions & Matter Team

Your firm has default settings for Matter Permissions and Matter Team. You can change these settings at any time.

• Matter Permissions

Choose the role for a specific person using the drop-down list.

- **Owners:** Can create, edit, review, and delete matters and matter documents.
- **Editors:** Can edit Matter details and review documents. Editors cannot delete a matter but can delete documents they added to the matter.

Matter Team			
Colleague	Roles	Matter Team	Matter Rate
Ajit Phadke	Owner	<input type="checkbox"/>	\$0.00
Amy Zine	Owner	<input type="checkbox"/>	\$0.00
Ana Garcia	Owner	<input type="checkbox"/>	\$0.00
Andrew Martens	Owner	<input type="checkbox"/>	\$0.00
Brian Jamagin	Owner	<input type="checkbox"/>	\$0.00

- **Read Only:** Can view all matter information but cannot edit or delete.
- **Denied Access:** User cannot see any portion of the matter.
- **Admin:** This is not a role you select here. Administrators have full ownership of everything.

• Matter Team

Select the **Matter Team** checkbox following a specific person's name to indicate that person is on the team for this matter. This matter will display on the My Matters list for all matter team members. You may be an Owner, Editor, or have Read Only permission and be on the Matter Team.

• Matter Rate

If you subscribe to Firm Central Time & Billing, users with the proper Time & Billing permission can change the hourly billing rates for any user.

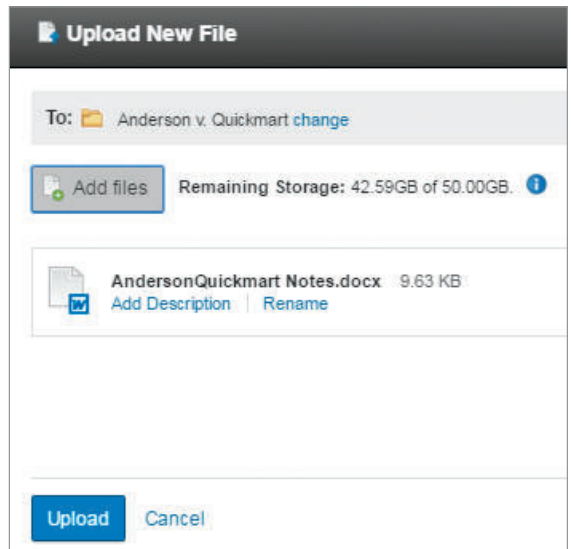
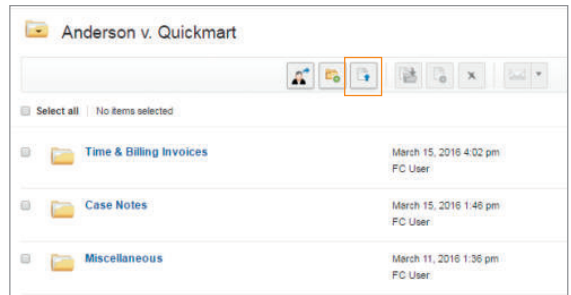
- Click **Save**.

ADD A DOCUMENT

Add documents to a matter with a few clicks

- Select a matter folder or subfolder from the Folders list on the Documents tab.
- Click the **Upload a Document** icon on the right side of the page.
- The file upload page for the matter is displayed. Click **Add Files** to access the file(s) you want to upload.
- Select the document(s) you want to upload to your matter, then click **Open**.
- The documents are displayed on the file upload page for the matter. Upload additional files by clicking **Add Files** and accessing the files. This is especially useful if you want to upload files from a different folder.
- Review the list.
 - You can add a description to any of the files.
 - You can rename any of the filenames.
 - If the list contains a file that you determine you do not want to upload, click the red **X** to delete it from the file upload page.
- Click **Upload**.

*NOTE: Firm Central shows the progress of your files uploading to the matter. As Firm Central uploads your documents, it applies indexing technology from Westlaw to add KeyCite® status flags to your cited authority and links to the full-text documents on Westlaw. You can access KeyCite and the full text of your cited references if you have a subscription to Westlaw. When all of your files are uploaded, click **Close**.*



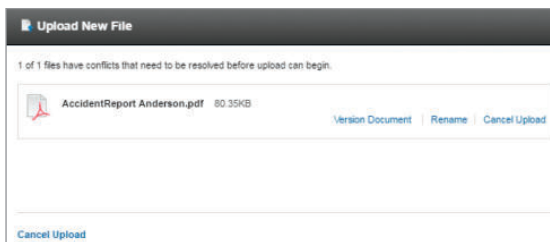
ADD A DOCUMENT *(CONTINUED)*

Create and maintain multiple versions of a document

Document versioning gives you the ability to modify an existing document and save a new version while still being able to access any previous versions of the document. When uploading a new version, be sure that you have saved the modified document with the original file name.

- To upload a new version of an existing document, click the **Upload a Document** icon and select the new file to upload.
- To version the selected file, click the **Upload** button, which will trigger a message notifying you that a conflict needs to be resolved before the upload can begin. (The conflict recognized by Firm Central is your attempt to upload a document with the same name as a document already in the matter folder.)
- Click the **Create New Version** icon to upload the modified document as a versioned document into Firm Central.

NOTE: You will have the ability to delete any of the versions stored within your version history as well as revert back to a prior version of the document.



DRAG AND DROP FOLDERS

FROM DESKTOP TO WEBSITE

You can now drag and drop folders into My Documents, Firm Library and Open or Closed Matters.

NOTE: The Google Chrome™ browser must be used to drag and drop folders from the desktop to the website; empty folders will not copy into Chrome.

Before you begin

Prior to executing the bulk import from desktop to website or desktop to desktop, a few steps will help make the process run smoother.

- In the Firm Central website, you may want to disable the document upload notification – this will avoid individual notifications from appearing for each file and folder uploaded. To adjust your notification settings, go to the *preferences* section, click on **Notifications** and deselect the checkbox next to Document Uploaded/Version Added. Then, click **Save**.
- Import all clients/matters or create clients/matters in the Firm Central website. This will set up your matters so you have target destinations for each matter's documents.

How it works

- Click the **Documents** tab, then select your desired location – My Documents, Firm Library, Open Matters or Closed Matters (or a subfolder) – to prepare your Firm Central document destination. If a specific matter is your destination, open the matter folder as well from the Open or Closed Matters folder.
- From your computer's desktop, access the folders and document(s), and select the title(s) and folder

*NOTE: To select all of the documents in a row, click the first document, hold down the **Shift** key and then click the last document. If the documents are not in a row, click the first document, hold down the **Ctrl** key and then click each additional file. Holding down the **Ctrl** key and the **A** key will select all folders and documents on the page.*

- Next, left-click your mouse, then drag the file(s) into the opened Firm Central folder area in the Chrome browser. A specific folder will highlight in green to indicate it is the selected target location of the drag-and-drop action. A green box will appear around the area indicating that the file(s) will drop to the root folder instead of a specific subfolder.
- Release the mouse button to drop the file(s) into the desired folder.
- Firm Central will show the progress of the files being uploaded. As Firm Central uploads the documents, it applies indexing technology from Thomson Reuters Westlaw™ to add KeyCite® status flags to your cited authority and links to the full-text documents on Westlaw®. Note that you need a subscription to Westlaw to access KeyCite and the full text of your cited references.
- After all of the files are uploaded, click **Close**.
- When using Google Chrome, you cannot drag empty folders into Firm Central's document area. If you attempt to do so, you will receive a warning message noting that you cannot drag the selected empty folders (or an unaccepted file type) and they will not be uploaded. Click **OK** to move past the warning screen and continue uploading the remaining folders and documents.
- When the upload dialogue box opens, it displays the list of folders and documents to be uploaded. You now have three options:
 - You may remain on this screen while the files upload (no other work can be done while on this screen).
 - You may cancel the upload and any remaining items will not upload.
 - You may select the **Open New Tab** button from the upload dialogue box. This will open a new tab in Firm Central, where you can continue to perform other work until the upload completes.

DRAG AND DROP FOLDERS – FROM DESKTOP TO WEBSITE (CONTINUED)

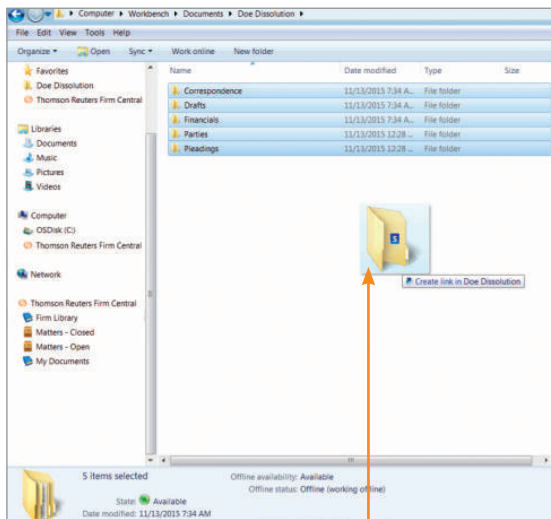
- If you return to the original tab during the upload, the displayed list will update to show the current progress, including those files that have successfully uploaded. You will also see a Cancel button that allows you to cancel the remaining uploads at any time. Once the upload completes, you must return to the original tab and close the dialogue box.

- To monitor the status of your upload, review the Upload Queue on the footer of the screen in the second tab. The Upload Queue text will display the number of documents left in the queue.

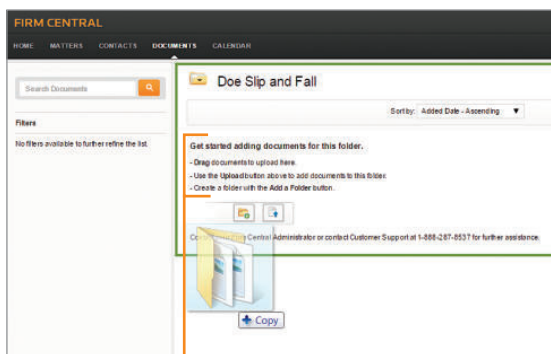
- Click on **Upload Queue** to see the list of upload batches you have started in the last 24 hours. You can view entries for completed uploads and note any items that did not upload due to an error. Click on the **email/print delivery** icon to deliver the list of items that failed to upload. These entries will disappear after 24 hours.

- Documents will be uploading to the system while the queue indicates the number of items. As documents are uploaded, they can be accessed and opened in their native formats.

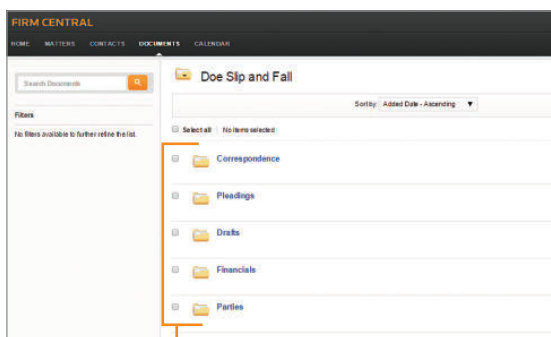
NOTE: It may take up to 24 hours for the documents to be indexed and available for search due to the bulk import process, which allows for the upload of a large number of items at one time.



Select desktop files or folders and begin the drag to the Firm Central website.



Drag the files or folders into the Firm Central website. When a green box appears, release the mouse to copy.



When the upload is complete, the files or folders will be accessible in Firm Central.

DRAG AND DROP FOLDERS

FROM DESKTOP TO DESKTOP

Users can use the drag-and-drop functionality to copy documents and folders into Matters using Windows Explorer. The desktop integration adds a Firm Central section to the groups of folders displayed in Windows Explorer on your computer. You can expand this section to access all of your Firm Central folders.

NOTE: To ensure drag-and-drop folder capability, users must have Version 2.1.0304 or newer installed.

How it works

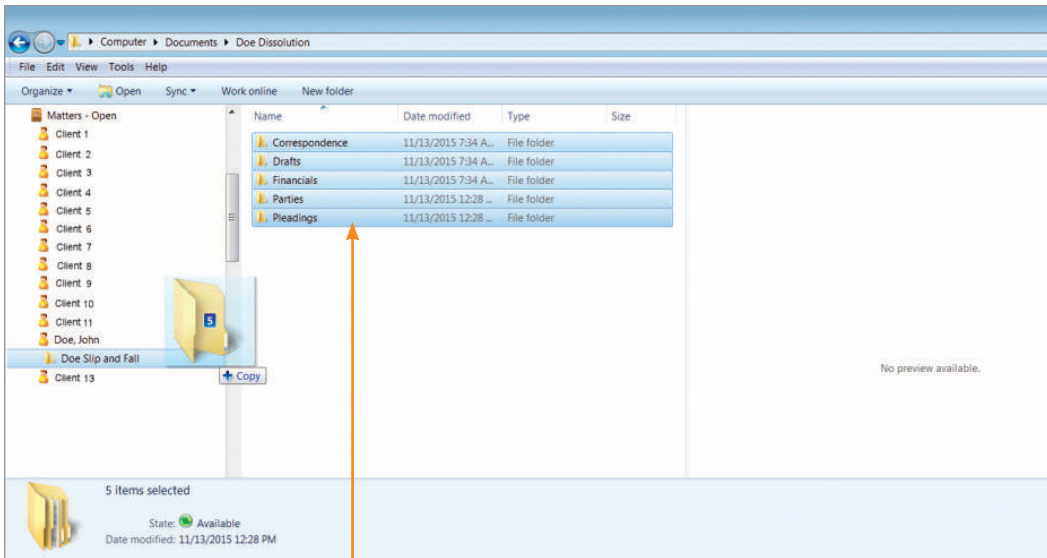
- Open a Windows Explorer window and navigate to the Firm Central directory. Next, open a separate Windows Explorer window and navigate to the folder or documents to be transferred.
- To copy documents and folders from your desktop computer to My Documents, Firm Library, Open Matters or Closed Matters (or a subfolder), select one or more documents and folders and drag them to the destination folder listed below the Firm Central heading.

*NOTE: To select all of the documents in a row, click the first document, hold down the **Shift** key and then click the last document. If the documents are not in a row, click the first document, hold down the **Ctrl** key and then click each additional file. Holding down the **Ctrl** key and the **A** key will select all folders and documents on the page.*

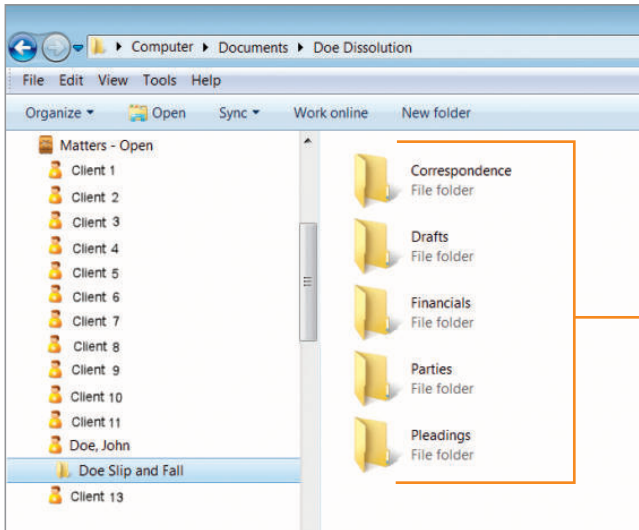
- Once the selected folders and documents are pulled to the destination folder, the system will display a progress bar to indicate that the upload is active.
 - If any unaccepted file types are included in the upload, they will be identified and will not upload.
 - You will receive a warning if a selected document or folder already exists in the destination location. As part of this process, you will be asked to **Rename** the item, mark it as a **New Version** of the previous document or **Don't Upload**.
 - Empty folders will upload to Firm Central as part of the desktop to desktop transfer option.
- To receive an update on the upload status of the files and folders, you can access the Firm Central desktop system tray in the footer. Right-click the **Firm Central Desktop Icon** in the footer and the system status tray will open.
- A list of files and folders waiting to upload will appear. The queue will show the number of items awaiting upload along with the list of files and folders.
- You may view a list of items that did not upload due to error by clicking on the **Error Report** button.
- As documents are uploaded, they can be accessed and opened in their native formats.

NOTE: It may take up to 24 hours for the documents to be indexed and available for search due to the bulk import process, which allows for the upload of a large number of items at one time.

DRAG AND DROP FOLDERS – FROM DESKTOP TO DESKTOP (CONTINUED)



Select desktop files or folders and begin to drag to the Firm Central destination folder.



When the upload is complete, the files or folders will be accessible in Firm Central destination folder.

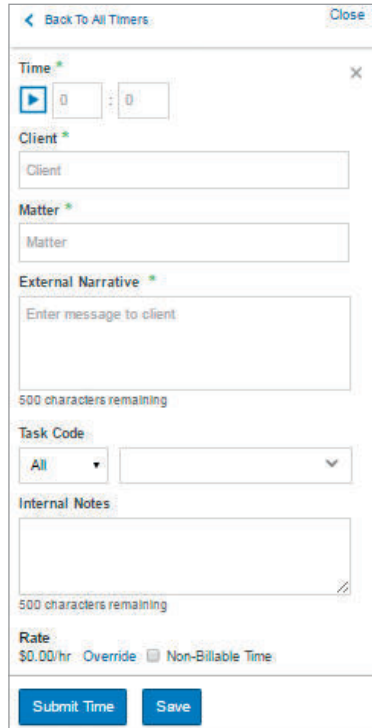
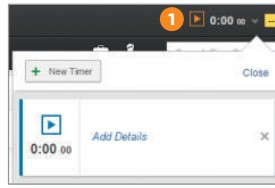
USING TIME & BILLING

When using Time & Billing through Firm Central, there are a number of functions the user can perform, from entering time to finalizing invoices and tracking payments.

Track your time in one of two ways

There are two ways to track your time: using the timer function, or on the Time Entry Time Sheet under the Time & Billing tab

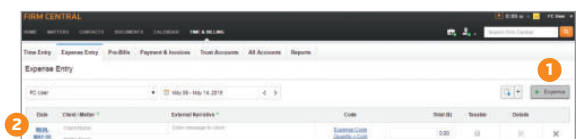
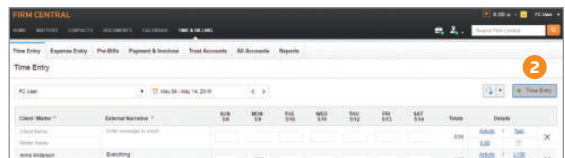
- 1 To track as you go, use the **Timer** in the upper right hand corner. Click the **Play** button to start tracking time. Click the **Pause** button when you are finished. A window will appear below the timer with a section to enter information about the time spent.
- 2 To add an entry at a later time, go to Time Entry under the Time & Billing tab and click the + **Time Entry** button near the upper right corner of the time sheet. A new row will appear, where detailed information can be entered. Click **Save**. Under the details section, the applicable rate will appear, or "FLAT" for flat fee agreement or "CONT" for a contingency agreement



Entering your expenses

To enter an expense associated with a matter, access the **Expense Entry** tab.

- 1 Click the + **Expense** button in the upper-right corner.
- 2 Enter the information in the new row that appears.
- 3 Click **Save**.

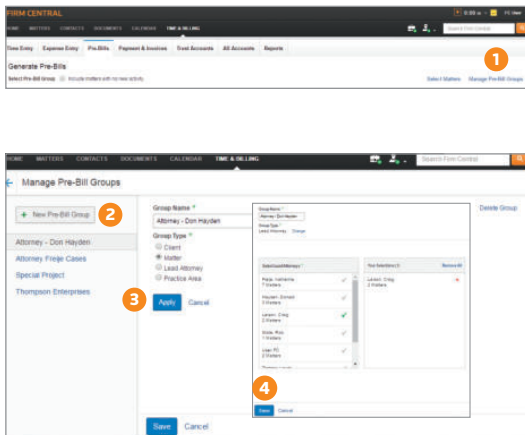


USING TIME & BILLING (CONTINUED)

Creating and managing pre-bill groups

Pre-Bill groups provide an option to organize pre-bills by group type: Client, Matter, Lead Attorney, or Practice Area.

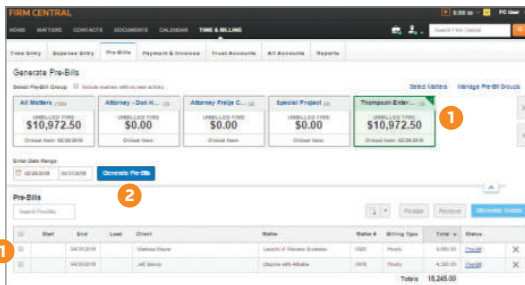
- 1 Access the **Pre-Bills** tab and click **Manage Pre-Bill Groups** in the upper-right corner.
- 2 On the next screen, click **+ New Pre-Bill Group**. Enter the Group Name and select the Group Type.
- 3 Click **Apply**. Based on the Group Type, new information will display to allow you to customize the Pre-Bill Group.
- 4 Click **Save** to complete the process.



Generating and reviewing pre-bills

Established pre-bill groups will be displayed at the top in the groups that were created. The individual groups display the unbilled totals for the matters included in the pre-bill group.

- 1 To create a pre-bill, click one of the pre-bill groups, or go to the **Select Matters** link to individually select matters for the pre-bill.
- 2 Verify the desired date range, and click **Generate Pre-Bills**.

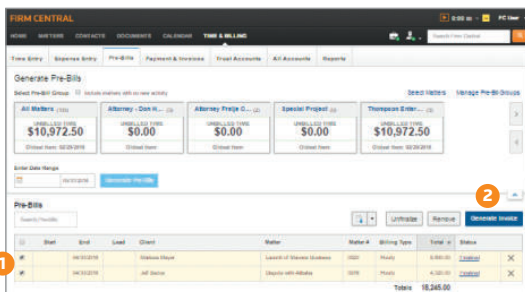


Once created, the pre-bill will appear in the list on the bottom half of the window. Click on the **Pre-Bill** link in the status column to review the details of the pre-bill.

Finalizing and generating invoices

Once the pre-bill is ready for the client, it is time to finalize it and create an invoice.

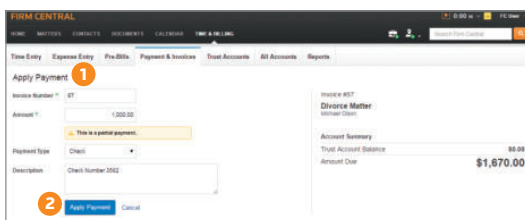
- 1 From the Pre-Bills tab, select the entries you want to add to the invoice.
- 2 Click **Generate Invoice**. The invoice is created and can be tracked on the Payment & Invoices tab.



Receiving and entering payments

Track your invoices and payments on the Payments & Invoices tab.

- 1 When a payment is received for an invoice, enter it in the **Apply Payment** box.
- 2 Enter the information, and click **Apply Payment** to save.
- 3 Search for invoices in the list below the Apply Payment box.



USING TIME & BILLING (CONTINUED)

Creating and managing trust accounts

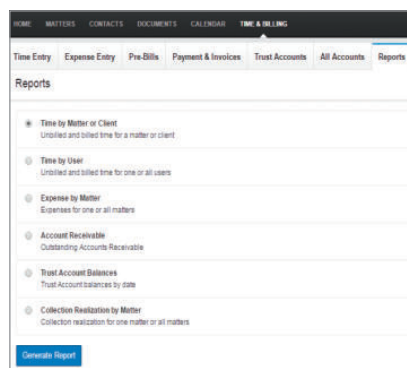
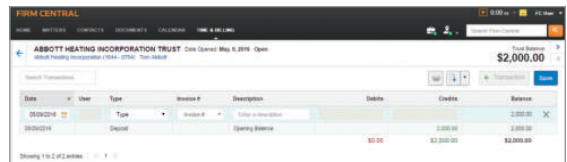
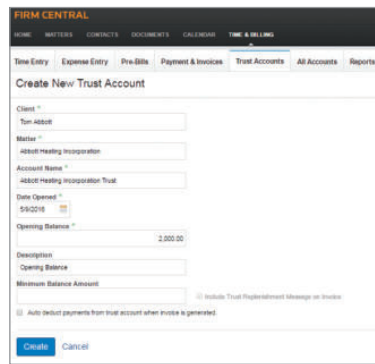
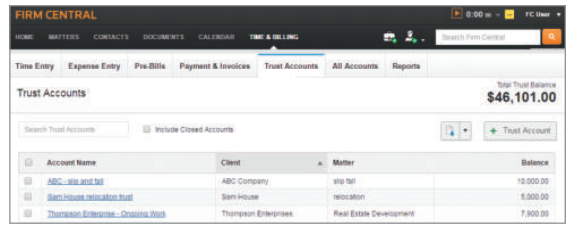
- 1 To create a trust account, access the **Trust Accounts** tab and click **+ Trust Account**.
- 2 Fill in the **Create New Trust Account** form. When you are finished, click **Create**.

To manage a trust account, click the **Account Name** on the **Trust Accounts** tab.

- 1 Click **+ Transaction** to record a deposit or disbursement to the trust account.
- 2 Fill in the entry in the row that appears, and click **Save**. The trust account balance will automatically update with each new entry.
- 3 To close a trust account, click the **Gear** button, and select **Close Trust Account** in the drop-down menu. All transactions will be archived after you close the account.

Generating reports

In the **Reports** tab on **Time & Billing**, you can download several reports that pertain to the firm's time and expenses. Select the radio button of the report you want to download, and click **Generate Report**. An **Export** window will appear that pertains to the specific report. Click **Export** to download the report.



USING THE CLIENT PORTAL

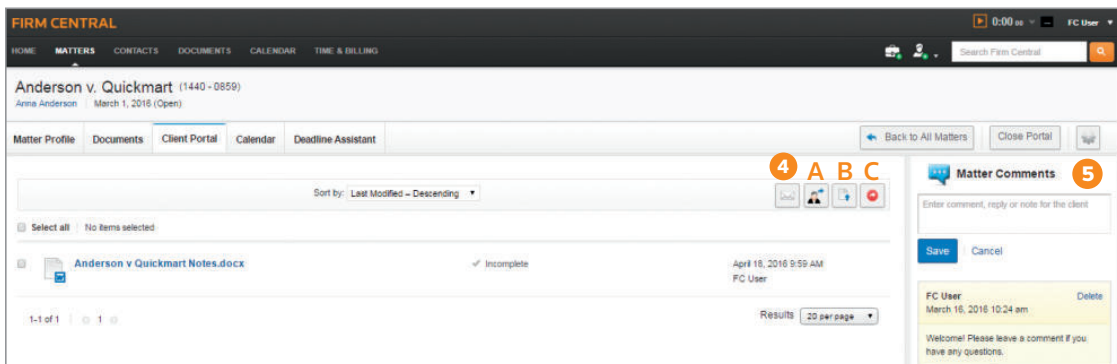
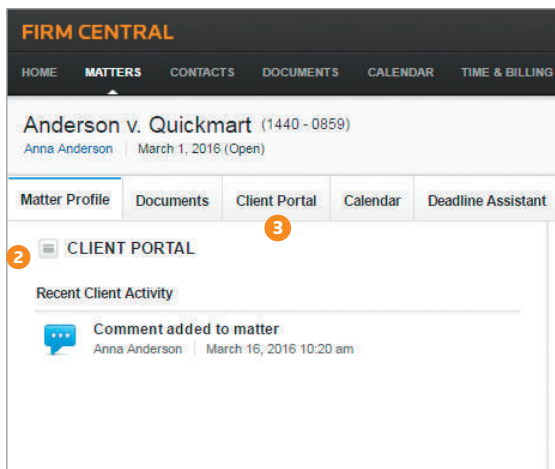
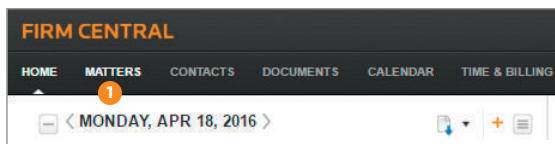
Streamline communications

The Client Portal allows you to easily send messages, documents, and forms to your clients directly from Firm Central. Clients log into a private and secure interface where they can view documents and other case details based on the permissions you set.

With the Client Portal, you no longer have to send sensitive and privileged information to a client's unsecure email address. Your clients have 24/7 access to a dashboard where they can review and upload documents, fill out forms, and communicate with you within a secure portal environment.

To use the Client Portal

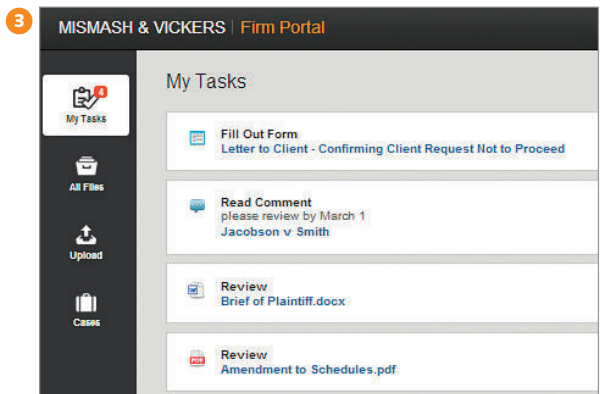
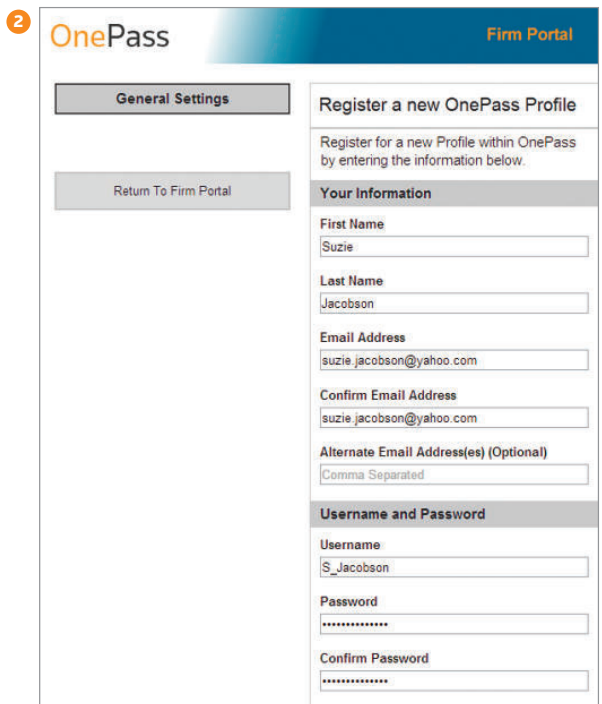
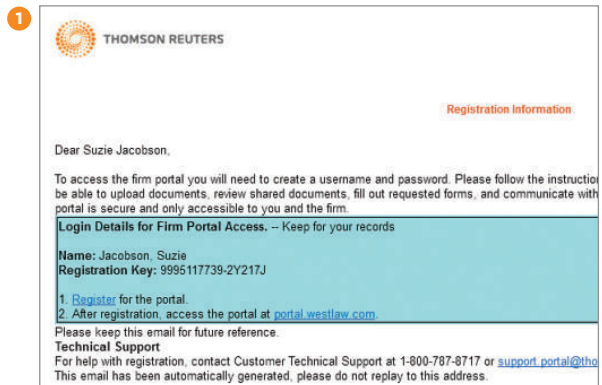
- 1 Click the **Matters** tab in the Firm Central header, then select a matter.
- 2 Once in the Matter Profile, notice the **Client Portal Recent Activity** section.
- 3 To share a document, click on the **Client Portal** tab.
- 4 You can share an existing document (A), upload and share a document (B), or stop sharing selected items (C) by clicking on the respective icon.
- 5 You can also send messages to your clients via the **Matter Comments** section.



USING THE CLIENT PORTAL (CONTINUED)

Clients using the Client Portal:

- 1 Receive a welcome email
- 2 Are provided with easy instructions to create a OnePass log-in
- 3 Can easily:
 - Review documents
 - Fill out forms
 - Share messages with you
 - Upload their own documents

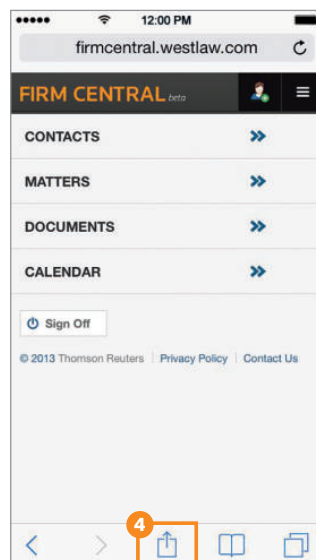
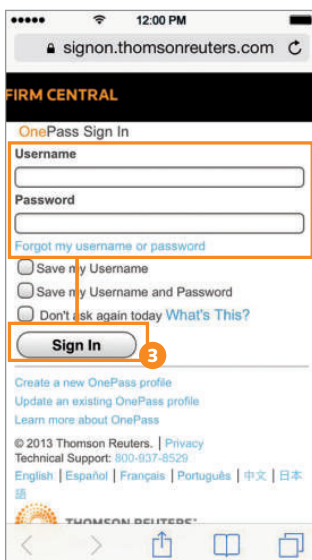
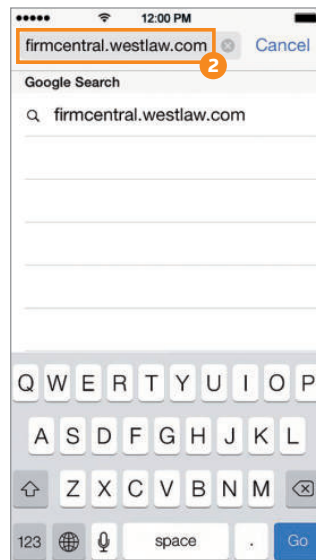
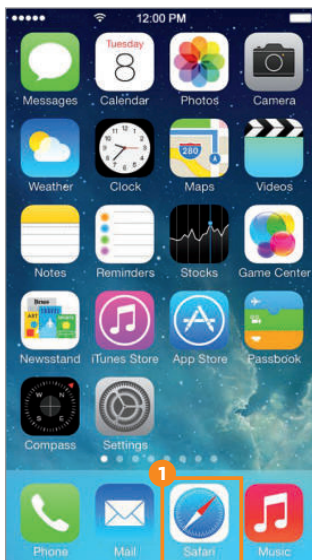


CREATE A SHORTCUT TO THE MOBILE VERSION OF FIRM CENTRAL

You're not always in your office, so you need access to all of your firm's information wherever you are, no matter what time of day. With Firm Central, you can manage everything from your desktop, laptop, tablet, or smartphone. All you have to do to enable your tools to work off-site is to create a simple Web application for either your iPhone®/iPad® or Android™ smartphone

iPhone/iPad

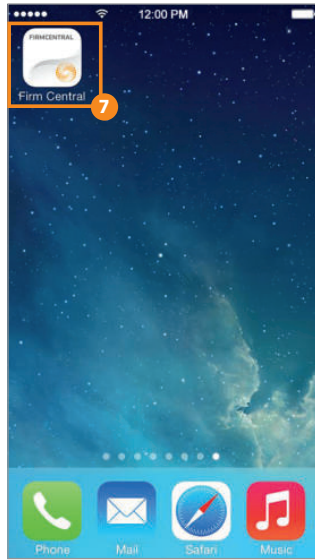
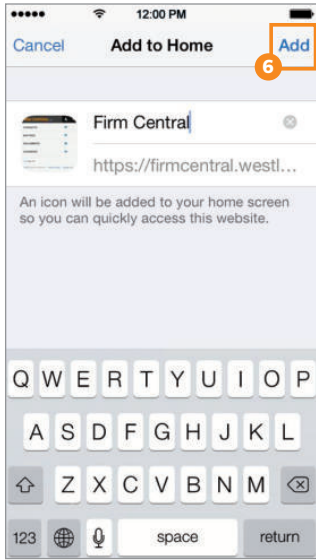
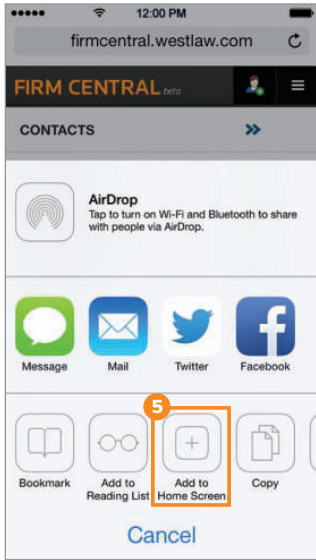
- 1 From the home menu, select **Safari**.
- 2 From Safari®, type **firmcentral.westlaw.com** in the browser, then click **Go**.
- 3 Log in to your account and click **Sign In**.
- 4 From this screen, select the **Share** icon.



CREATE A SHORTCUT TO THE MOBILE VERSION OF FIRM CENTRAL (CONTINUED)

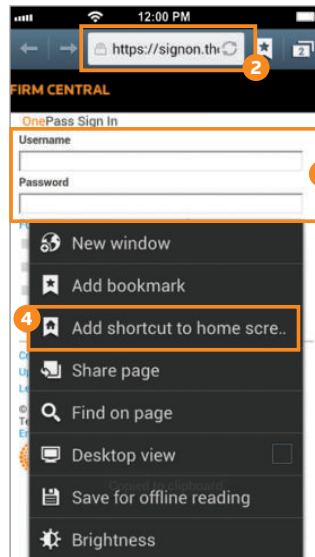
iPhone/iPad (continued)

- 5 Select the **Add to Home Screen** button.
- 6 Click the **Add** button.
- 7 Your new **Mobile Shortcut** should appear on your screen.



Android

- 1 From the home screen, open the Internet.
- 2 In the browser, type in **firmcentral.westlaw.com**.
- 3 Log in to your account and press **Sign In**.
- 4 Once signed in, click the **menu** button and then click **Add shortcut to home screen**.
- 5 Your new **Mobile Shortcut** should appear on your screen.



INSTALL THE OUTLOOK AND DESKTOP PLUG-IN AND SET IT UP IN NO TIME.

(FOR PC USERS)

If you're a PC user, Install the Desktop Integration Plug- In by downloading it from firmcentral.com/support.

You can go to Windows Explorer on your computer to see the Firm Central integration with your desktop. It's easy to drag any additional documents to your matter folders that you want to include with the matter and share with the others on the Matter Team.

Windows Explorer Integration

How to drag and drop files into Firm Central

- Launch Windows Explorer and Firm Central appears in your folder structure.
- Navigate to your matter-specific folder and simply drag and drop your document to that folder.

How to save Microsoft documents to a folder on Firm Central

- Through any Microsoft program, similar to your desktop, save into your Firm Central matter folders.

Once the plug-in is installed, you'll be able to seamlessly deliver emails directly from Outlook into specific matter folders in Firm Central. You'll also be able to upload your list of contacts directly from Outlook into Firm Central.

Outlook Integration (Two-Way Sync of Events between Firm Central and Outlook)

This integration allows you to create and edit calendar appointments for specified matter calendars in Firm Central.

How to export an email from Outlook into Firm Central

- Select email to be exported.
- On the top left of the page, click Copy to Firm Central.
- Drill down to the specific matter file where you want to export email; or use the search feature.
- The export process takes only seconds.

*NOTE: You can also drag and drop select emails to your Firm Central file folder. Outlook will display your 15 most recent matters. Matters not displayed in Recent Matters can be searched by clicking on **Search Folders** under the Firm Central file folder or by right-clicking anywhere in the Outlook PST files and selecting **Search for Matters**.*

How to export contacts from Outlook into Firm Central

- Select contact(s) to be exported.
- Click Copy to Firm Central on the top left of your screen.
- Instantly the information is transferred into Firm Central.

How to send an Outlook Appointment into Firm Central

- Create a new calendar appointment in Outlook.
- You'll be prompted to select a Client and Matter.
- Make your selections and fill the remaining fields.
- Click Save and the appointment will be saved in your Outlook calendar and also within the selected Matter calendar in Firm Central.
- Conversely, you can create or edit matter appointments in Firm Central and they will sync with your Outlook calendar.

Deadline Assistant Integration

Deadline Assistant users will also see deadlines on their calendars and can easily link back to Deadline Assistant to edit them. For more assistance regarding Deadline Assistant, please see in-product help or call the Firm Central dedicated technical support line at 1-888-287-8537.

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WHATEVER HELP YOU NEED.
WHENEVER YOU NEED IT.

Firm Central Support

1-888-287-8537

Specialists are available 24/7, every day of the year

Firm Central Downloads

Download the latest version of the PC desktop Plug-in
at firmcentral.com/support

Online Video Help

Access short how-to videos at firmcentral.com/videos



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FIRM CENTRAL

GET
SET UP

GET
TO WORK

GET
STARTED