FIRM CENTRAL CLIENTS & CONTACTS

Firm Central allows users to store names and contact details of individuals and businesses that they deal with. Users have the option of distinguishing between clients and non-clients, individuals and businesses, and contacts which everyone in the firm can view or only the individual user can view.

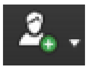
ADDING A NEW CONTACT

Contacts are people or businesses that you deal with who are not your clients (e.g. other lawyers, banks, real estate agents, Court staff, witnesses, etc). You can create contacts details for people and for businesses that your firm deals with

ADDING A PERSON AS A CONTACT

You can create contact details for a new person that your firm is doing business with by doing the following:

1. Either:
    - Click the Add Contact, Client or Client Group button in the Firm Central banner and selecting **New Contact** from the drop down that appears:

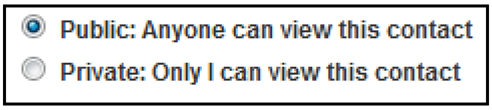
      

    - Click the **Contacts** tab in the Firm Central banner, and then clicking the New Contact button:

2. Both of these methods will bring you to the New Contact screen, where you can fill in the any of the following details that are relevant to this contact:

CONTACT TYPE  	Use the Contact Type radio button to indicate whether this contact is a Person or a Business. The Person option will automatically be selected, so if you are creating a new contact for a person, you should not need to make any changes to this field.
ROLES  	If you wish to indicate what type of role this contact is (eg Lawyer, Court Clerk or Personnel, Prospective Client, Vendor, etc). Click the Select Roles button and place a tick in the checkbox beside one or more of the available roles. This field is optional, if you do not wish to populate it, you do not have to.
NAME	You can enter your contact's: • Prefix (e.g. Mr, Ms, Mrs, Dr, etc) • First Name • Last Name • Suffix (e.g. Jnr, Snr)

	• Middle Name • Preferred Name • Spouse/Partner's Name The First Name and Last Name are the only required fields. You must enter these details before you can save the Contact. All of the other name details are optional.
EMPLOYMENT	You can enter your contact's: • Employer • Job Title These fields are both optional. If you do not wish to populate them, you do not have to.
CONTACT INFORMATION	You can enter your contact's: • Phone (Home, Work, Mobile, Fax, Other) • Email (Home, Work, Other) • Website These fields are all optional. If you do not wish to populate them, you do not have to.
ADDRESS	You can enter Home/Work/Other address details for your contact including: • Street name and number/PO Box • Suburb • City • State • Post Code • Country (default value=Australia) These fields are all optional. If you do not wish to populate them, you do not have to.
NOTES	The New Contact form includes a field where you can record any relevant notes (up to 500 characters) about the contact. This field is optional. If you do not wish to populate them, you do not have to
PUBLIC/PRIVATE  	At the end of the New Contact form is an option to select whether this contact should be Public or Private. Select Public if you want anyone at your firm to see this contact. Select Private if you want to be the only person who can see this contact. The default value is Public. Public will automatically be selected unless you click on the Private option.

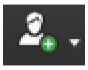
3. Once you have entered all the details you need to, you can press the **Save** button to save the contact to the Contacts list.

ADDING A BUSINESS AS A CONTACT

You can create contact details for a business or organisation (eg a bank, another law firm, a real estate agent) that your firm deals with by doing the following by doing the following:

1. Either:

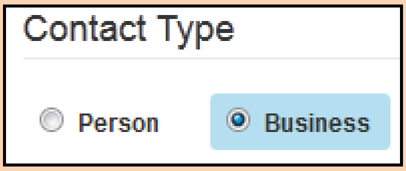
    - Click the Add Contact, Client or Client Group button in the Firm Central banner and selecting **New Contact** from the drop down that appears:

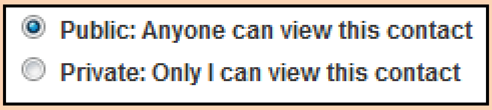
      

    - Click the **Contacts** tab in the Firm Central banner, and then clicking the New Client button:

2. Both of these methods will bring you to the New Contact screen, where you can fill in the any of the following details that are relevant to this contact:

CONTACT TYPE  	Use the Contact Type radio button to indicate whether this contact is a Person or a Business. The Person option will automatically be selected, so if you are creating a new contact for a business or organisation you will need to click on the Business option. Clicking the Business option will change the fields that are displayed on the New Contact form to fields that are contain information that is more relevant to a business or organisation.
ROLES  	If you wish to indicate what type of role this contact is (e.g. Court, Prospective Client, Vendor, etc). Click the Select Roles button and place a tick in the checkbox beside one or more of the available roles. This field is optional, if you do not wish to populate it, you do not have to.
BUSINESS NAME	You can enter your contact's: • Business Name • Doing Business As name • Primary Contact The Business Name is the only required field. You must enter a Business Name before you can save the Contact. All of the other name details are optional. If you wish to populate the Primary Contact, and have already created a contact for the person who will be the Primary Contact for this business, you can start typing the person's name in the Primary Contact field, and then select the desired name from the predictive text list. If you wish to populate the Primary Contact, but have not already created a contact for the person who will be the Primary Contact for this business, you can start typing the person's name in the Primary Contact field, and then select + **add new contact**. The following three fields will now appear: First Name, Last Name, and Email. The Email field is

	optional, but you must fill in the First Name and Last Name field before you can click the Save Contact button. This will Save the Primary Contact information and create a “Person” contact for the Primary Contact.
BUSINESS CONTACT INFORMATION	You can enter the business’s: • Phone (Home, Work, Mobile, Fax, Other) • Email (Home, Work, Other) • Website These fields are all optional. If you do not wish to populate them, you do not have to.
BUSINESS ADDRESS	You can enter Home/Work/Other address details for your contact including: • Street name and number/PO Box • Suburb • City • State • Post Code • Country (default value=Australia) These fields are all optional. If you do not wish to populate them, you do not have to.
NOTES	The New Contact form includes a field where you can record any relevant notes (up to 500 characters) about the contact. This field is optional. If you do not wish to populate them, you do not have to.
PUBLIC/PRIVATE 	At the end of the New Contact form is an option to select whether this contact should be Public or Private. Select Public if you want anyone at your firm to see this contact. Select Private if you want to be the only person who can see this contact. The default value is Public. Public will automatically be selected unless you click on the Private option.

3. Once you have entered all the details you need to, you can press the **Save** button to save the contact to the Contacts list.

ADDING A NEW CLIENT

You can create contacts details for individuals and businesses that your firm deals with as clients.

ADDING A PERSON AS A CLIENT

You can create contact details for a new person by doing the following:

1. Either:

    - Click the Add Contact, Client or Client Group button in the Firm Central banner and selecting **New Contact** from the drop down that appears:

    - Click the **Contacts** tab in the Firm Central banner, and then clicking the New Client button:

2. Both of these methods will bring you to the New Client screen, , where you can fill in the any of the following details that are relevant to this client:

CONTACT TYPE 	Use the Contact Type radio button to indicate whether this client is a Person or a Business. The Person option will automatically be selected, so if you are creating new client details for a person, you should not need to make any changes to this field.
NAME	You can enter your client's: • Prefix (e.g. Mr, Ms, Mrs, Dr, etc) • First Name • Last Name • Suffix (e.g. Jnr, Snr) • Middle Name • Preferred Name • Spouse/Partner's Name The First Name and Last Name are the only required fields. You must enter these details before you can save the Contact. All of the other name details are optional.
EMPLOYMENT	You can enter your client's: • Employer • Job Title These fields are both optional. If you do not wish to populate them, you do not have to.
CONTACT INFORMATION	You can enter your client's: • Phone (Home, Work, Mobile, Fax, Other) • Email (Home, Work, Other) • Website

	These fields are all optional. If you do not wish to populate them, you do not have to.
ADDRESS	You can enter Home/Work/Other address details for your client including: • Street name and number/PO Box • Suburb • City • State • Post Code • Country (default value=Australia) These fields are all optional. If you do not wish to populate them, you do not have to.
NOTES	The New Client form includes a field where you can record any relevant notes (up to 500 characters) about the contact. This field is optional. If you do not wish to populate it, you do not have to.
ALTERNATE ID	If you need to record an ID number of some sort for your client, you can use this field. This field is optional. If you do not wish to populate it, you do not have to.
REFERRED BY	If this client was referred by another person, and you wish to record this information, you can enter the name of the person who referred the client. This field is optional. If you do not wish to populate it, you do not have to.

3. Once you have entered all the details you need to, you can press the **Save** button to save the client to the Contacts list.

ADDING A BUSINESS AS A CLIENT

You can create contact details for a business or organisation (e.g. a bank, another law firm, a real estate agent) that your firm deals with by doing the following by doing the following:

1. Either:

   - Click the Add Contact, Client or Client Group button in the Firm Central banner and selecting **New Contact** from the drop down that appears:

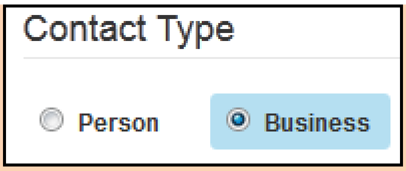
     

   - Click the **Contacts** tab in the Firm Central banner, and then clicking the New Client button:

2. Both of these methods will bring you to the New Contact screen, where you can fill in the any of the following details that are relevant to this client:

CONTACT TYPE	Use the Contact Type radio button to indicate whether this contact is a Person or a Business.



The Person option will automatically be selected, so if you are creating a new contact for a business or organisation you will need to click on the Business option.

Clicking the Business option will change the fields that are displayed on the New Contact form to fields that are contain information that is more relevant to a business or organisation.

BUSINESS NAME

You can enter your client's:

- Business Name
- Doing Business As name
- Primary Contact

The Business Name is the only required field. You must enter a Business Name before you can save the Contact. All of the other name details are optional.

If you wish to populate the Primary Contact, and have already created a contact for the person who will be the Primary Contact for this business, you can start typing the person's name in the Primary Contact field, and then select the desired name from the predictive text list.

If you wish to populate the Primary Contact, but have not already created a contact for the person who will be the Primary Contact for this business, you can start typing the person's name in the Primary Contact field, and then select + **add new contact**. The following three fields will now appear: First Name, Last Name, and Email. The Email field is optional, but you must fill in the First Name and Last Name field before you can click the Save Contact button. This will Save the Primary Contact information and create a "Person" contact for the Primary Contact.

BUSINESS CONTACT INFORMATION

You can enter the business's:

- Phone (Home, Work, Mobile, Fax, Other)
- Email (Home, Work, Other)
- Website

These fields are all optional. If you do not wish to populate them, you do not have to.

BUSINESS ADDRESS

You can enter Home/Work/Other address details for your client including:

- Street name and number/PO Box
- Suburb
- City
- State
- Post Code
- Country (default value=Australia)

These fields are all optional. If you do not wish to populate

	them, you do not have to.
NOTES	The New Client form includes a field where you can record any relevant notes (up to 500 characters) about the contact. This field is optional. If you do not wish to populate them, you do not have to.
ALTERNATE ID	If you need to record an ID number of some sort for your client, you can use this field. This field is optional. If you do not wish to populate it, you do not have to.
REFERRED BY	If this client was referred by another person, and you wish to record this information, you can enter the name of the person who referred the client. This field is optional. If you do not wish to populate it, you do not have to.

3. Once you have entered all the details you need to, you can press the **Save** button to save the contact to the Contacts list.

UPDATING CLIENT/CONTACT DETAILS

If changes need to be made to a client or contact's details (eg updating address or phone numbers, adding additional details), you can do the following:

1. Click the Contacts link in the site banner at the top of the page
2. Type the name of the client or contact you wish to update in the search field and click the magnifying glass:

3. When the search results are displayed, click on the client/contact name that you wish to update
4. When the client/contact screen displays, click the **Edit** button
5. Make any changes you need to make
6. Click the **Save** button