THOMSON REUTERS

Firm Central Matters guide

Firm Central allows users to create and store details about a matter, give colleagues access to the matter, create tasks and appointments that relate to the matter, record notes against the matter and store documents which relate to the matter.
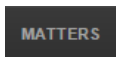
Adding a new matter

There are two ways you can create a new matter and record relevant details.
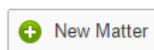
1. Click the Add Matter button on the Firm Central banner:

    Click the Matters tab on the Firm Central banner:

2. Click the New Matter button:

Both of these methods will bring you to the New Matter screen where you can fill in any information relevant this matter.

Begin by recording the following details:

    Matter Name (required)
    Client (required)
    Date (required)
    Alternate ID (optional)

If the client for this matter has already been entered into the firm's records, the client name will appear as predictive text when you start typing in the Client field.

If the client is a new client, a 'create a new client' link will appear when you start typing the client's name in the Client field. Clicking this link will open the New Client window, where you can enter the client's full name and contact details, then save and automatically return to the New Matter page. The alternate ID field is optional but if used will overwrite the system generated matter ID.

Matter Description

The matter description allows you to assign a basic classification and description to the matter and record the opposing party's details, if needed.
The following fields are available:

Practice Area	Practice Area dropdown can be used to assign the matter to a general practice area. This field can be used for searching for matters in the future.
Work Type	This drop down can be used to assign a secondary classification based on the Practice area.
Work Description	This field is a free text field which can be used to supply a short description of what the matter is about.
Opposing Party	Opposing Party area allows you to enter the name and contact details of the opposing party or parties in the matter.
Memo	

Billing Information

You can record the billing type you wish to apply to this matter. This is for reference purposes only. Your billing will be completed within the Time & Billing module.

Court Information

If the matter is going to court, you can record the following details:

- Court/Jurisdiction
- Court File Number
- Limitation Period

Matter Team

This area contains a list of all members of your firm.

The Roles drop down menu appears beside each colleague. This is where you can indicate what level of access that colleague should have. There are four options that can be selected:

Owners	Can create, edit and delete matters and matter documents.
Editors	Can edit matters. Editors cannot delete a matter or move/delete documents added to a matter.
Read Only	Can view all matter information but cannot edit or delete.
Denied	User cannot see any portion of the matter.

The matter team checkbox can also be ticked. This will mean that the matter appears in that person's My Matter's list. The tasks and activities relating to this matter will show in the Calendar, Tasks, and Notifications widgets on that person's homepage.

Once you have entered all the details you need to, you can press the Save button at the bottom of the page.

Matter Profile Page

All matter profile content modules are widgets that can be repositioned on the page via drag-and-drop functionality, just like your Firm Central Homepage.

The following icons appear in some or all of the different sections.

	Allows you to email or print the information contained in a section
	Allows you to print the Matter Profile Page information.
	Maximise/ Minimise a widget.

You can customise your Matter Profile page via your Preferences page. You will find this page in the drop down menu under your user name on the main Firm Central banner.
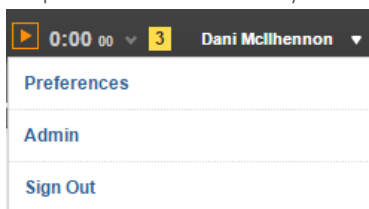
Just click the Matter Page option in the left hand column. Here you can select/ deselect any of the widgets, with the exception of the Matter Details widget.

Matter Details

The matter details section will contain the information you entered when the matter was set up. This can be added to or edited at any point by clicking the following icon:

When you click this button the edit matter page will open. This page will be similar to the new matter page so all sections can be edited in one place.

Notes

The note feature can be used to remind you or other members of the matter team what point the matter is at, or what needs to happen next.

To create a new note

- Click the following icon within the notes widget:

  +

- A text box will appear. Enter text and click the Save button.

- Your note will now appear on the matter profile page.

The notes widget will show the last 6 notes created. To see all notes, simply scroll to the bottom of this list and select show all notes.

Tasks

You can create tasks with assigned due dates. You can choose to make this task private or leave as default; where anyone with access to the matter can see the task.

Closing/ Deleting a Matter

To close or delete a matter, click on this icon and choose the required option.