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THOMSON REUTERS®

FIRM CENTRAL

USER GUIDE

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Welcome to Firm Central

Firm Central is the ideal matter and billing management tool for sole practitioners and small law firms to accomplish more for your clients with less effort and more efficiency.

EVERYTHING YOU NEED IN ONE CONVENIENT LOCATION

Firm Central simplifies your work process by providing one secure online location where you can access the information and tools you need to manage your matters, billing and invoicing.

You will be able to collaborate more effectively with colleagues and clients, securely share documents, record your time and expenses, create invoices, log payments and search Practical Law Know How content.

Outlook and Windows Explorer integration help to manage your documents and tasks efficiently, removing the need for unnecessary, time-consuming admin work.

IT'S EASY TO GET STARTED

1. Once you've received your **Firm Central Registration Email**, you can use the OnePass section of this guide 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. If you need help with registering OnePass, installing the Desktop Integration Plug-in, creating contacts, matters, clients or uploading documents, our Product Specialists are available through the contact details within this user guide.

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SMOOTH YOUR WORKFLOW BY COMBINING ALL OF YOUR ELECTRONIC INFORMATION.

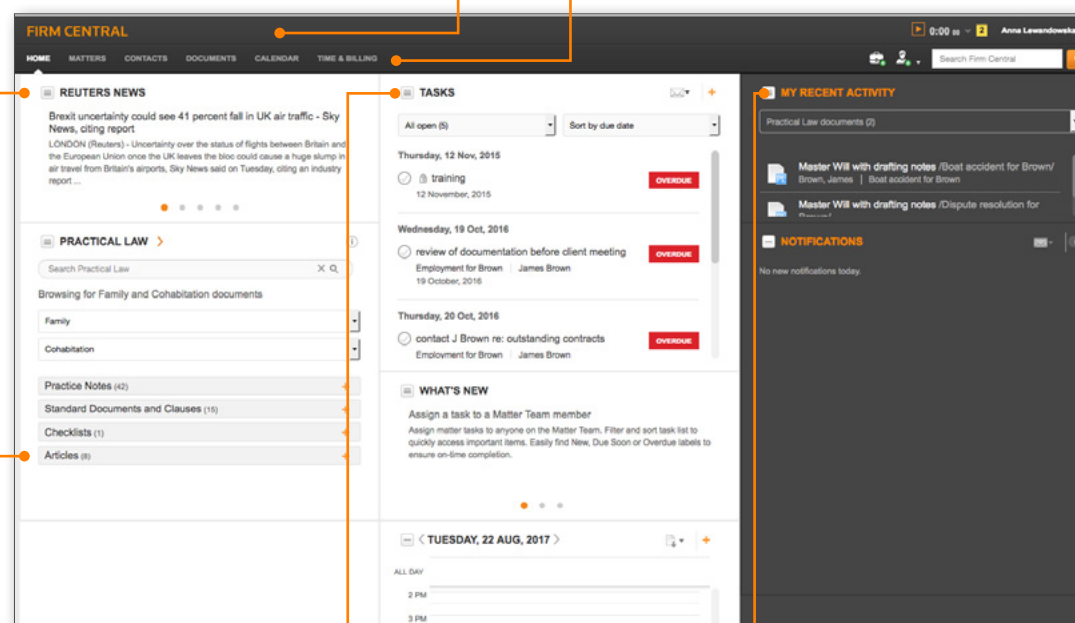
Sign in to Firm Central to immediately access client and matter files, Practical Law, Microsoft Outlook, Windows Explorer and Reuters News.

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.

EFFICIENTLY MANAGE YOUR FINANCIALS:

Record time and expenses, create and review pre-bills, generate invoices and manage client money – all conveniently located in “Time & Billing” section of Firm Central



CUSTOMISE YOUR HOMEPAGE TO MAXIMISE YOUR WORKFLOW.

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

NEVER MISS A DEADLINE OR FORGET A TASK.

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

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.

FIND WHAT YOU NEED QUICKLY.

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

WHAT IS ONEPASS?

OnePass is a login system, which will allow you to sign in to multiple Thomson Reuters applications with a single username and password – giving you more security, more control and more convenience.

With OnePass, you create your own username and password that will not only help protect your identity and the information you provide, but also allow you to access multiple Thomson Reuters applications including Practical Law, Westlaw UK, ProView and more, with one set of login credentials.

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 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 and skip to the next page in this user guide.
 - 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 your OnePass username and password for yourself following the requirements that appear on the page. Choose a security question that you can answer if you need to reset your password.
 - Click **Create Profile**.
 - A message confirming your successful registration appears. 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.

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UPDATE AN EXISTING ONEPASS PROFILE

- 2 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.

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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](#)

[Update an existing OnePass profile](#)

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Create a contact

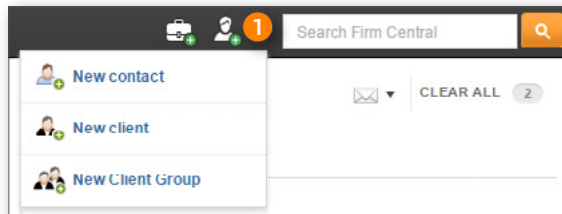
ADD A SINGLE CONTACT IN ONE OF TWO WAYS

- 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 Surname 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 has a 'CONTACTS' tab selected in the header. The form is divided into several sections: 'Contact Details' with 'Contact type' (Person/Company), 'Name' (First name/Surname), 'Email' (Home/Additional), 'Phone' (Home/Additional), 'Address' (Home/Additional), and 'Additional information' (Public/Private). The 'Public' option is selected under 'Additional information'. At the bottom, there are 'Save' and 'Cancel' buttons.

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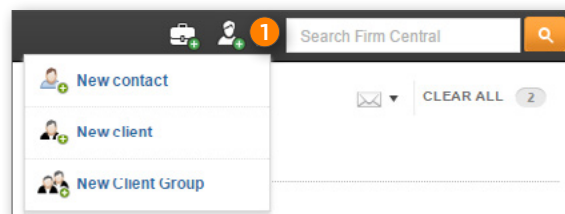
Create a contact

ADD A SINGLE CLIENT IN 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 Surname 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 Firm Central. The form is titled 'New client' and has a red circle and the number '2' next to the title. The form is divided into several sections: 'Client details', 'Name', 'Email', 'Tel', 'Address', and 'Additional information'. The 'Client details' section has a 'Client type' dropdown with 'Person' selected. The 'Name' section has 'First name' and 'Surname' fields. The 'Email' section has a 'Home' dropdown and an 'Add email' button. The 'Tel' section has a 'Home' dropdown and an 'Add tel number' button. The 'Address' section has a 'Home' dropdown and fields for 'City', 'County', 'Postcode', and 'Country'. The 'Additional information' section has an 'Add address' button. At the bottom of the form are 'Save' and 'Cancel' buttons.

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Create a matter

Now you have some clients and contacts created in Firm Central, you'll want to get on with your priority tasks and transactions - your matters.

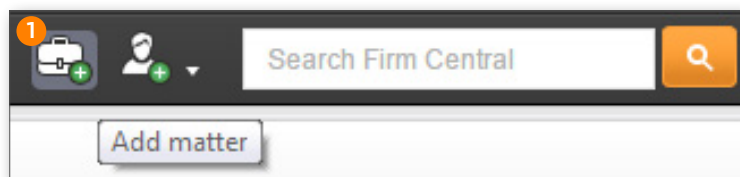
ADD A SINGLE MATTER IN ONE OF TWO WAYS

- 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**.

The New Matter form includes five sections: Matter Details, Matter Description, Jurisdiction, Matter Permission & Matter Team, and Notes. 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.
- Assign a Matter ID for each new matter created using the method your firm uses to identify matters.



MATTER DESCRIPTION (optional)

- 3 Select a practice area from the drop-down menu.

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 sub-type, select the type from the drop-down menu.
- For example, Intellectual Property has the types Patents, Copyright, or Trademarks.
- Enter a description of the matter. This field is also searchable.
- Enter related party contact information.

A screenshot of the 'New matter' form in Firm Central. The form is divided into several sections. At the top, there is a navigation bar with 'HOME', 'MATTERS', 'CONTACTS', 'DOCUMENTS', and 'CALENDAR'. Below this, the 'New matter' form has fields for 'Matter name', 'Client', 'Date opened' (with a calendar icon), and 'Our reference'. A note states 'Will replace the system-generated matter ID.' Below these fields is the 'Matter description' section, which includes a 'Practice area' dropdown menu (highlighted with a red circle and the number 3), a 'Sub-type' dropdown menu, and a text area for 'Matter description' (with a character count of 250). Below the description section is the 'Related party' section, which includes a 'Name' field and a 'Contact information' link. At the bottom, there is a 'Memo' section with a text area (with a character count of 1000).

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Create a matter

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.

- **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:** Can set up and deactivate users and customise Firm Central settings and notifications.

• 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.

- Click **Save**.

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HOME MATTERS CONTACTS DOCUMENTS CALENDAR

Matter permission & Matter team

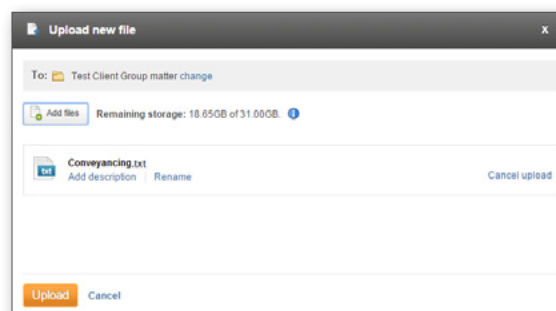
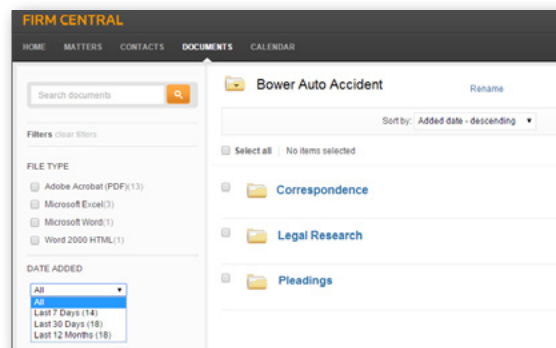
Colleague	Matter permission	Matter team
Tom Balding	Owner ▼	<input type="checkbox"/>
Fiona Watkins	Owner Editor Read-only Access denied	<input checked="" type="checkbox"/>
Felix Stowe	Owner ▼	<input type="checkbox"/>
Helen Jenner (admin)	Owner ▼	<input type="checkbox"/>
Manish Williams	Owner ▼	<input type="checkbox"/>

Add a document

ADDING DOCUMENTS TO A MATTER

- 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 documents.
 - 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. When all of your files are uploaded, click Close.



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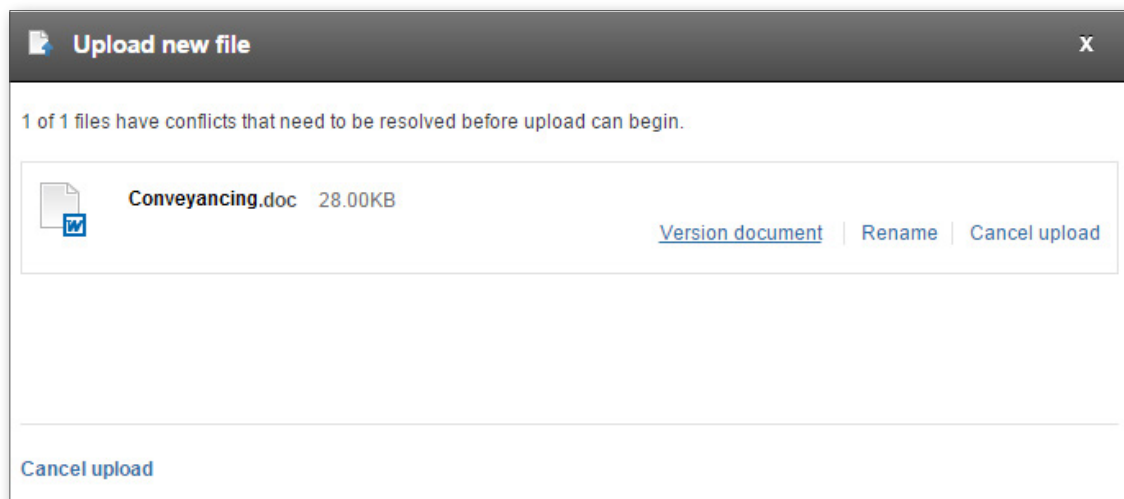
Add a document

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 recognised 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.



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Using the client portal

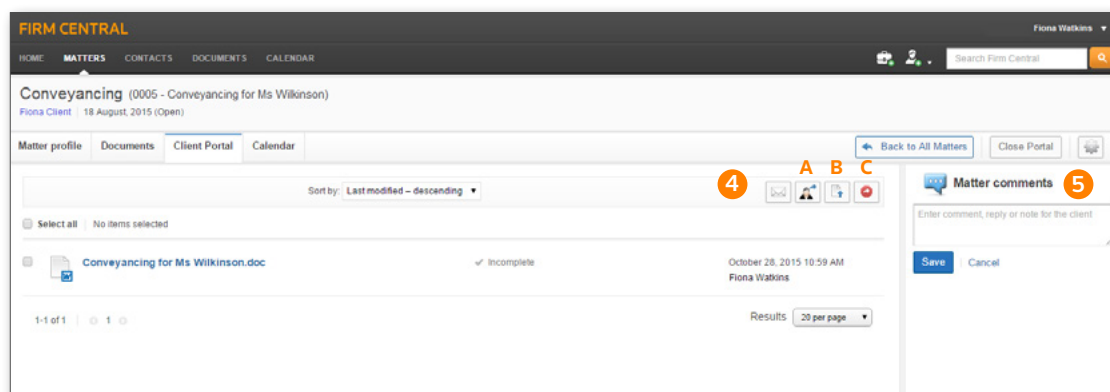
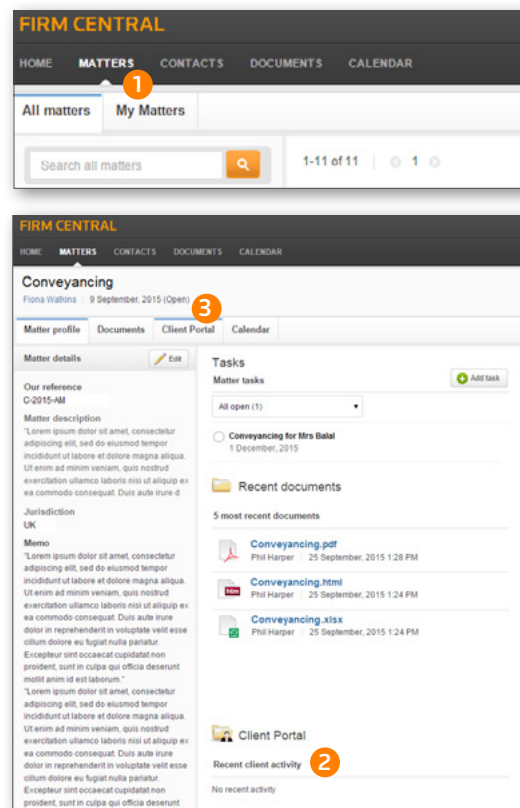
STREAMLINE COMMUNICATIONS

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 matter comments 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 any time 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 To share a document, click on the Client Portal tab or select a document in the Documents tab and click on the Share with client icon.
- 2 In the Client Portal tab, you can click on the respective icon to:
 - (A) share an existing document
 - (B) upload and share a document
 - (C) stop sharing selected items
- 3 You can also send messages to your clients via the Matter Comments section.
- 4 Summary of the most recent Client Portal activity can be viewed in the Matter profile tab.



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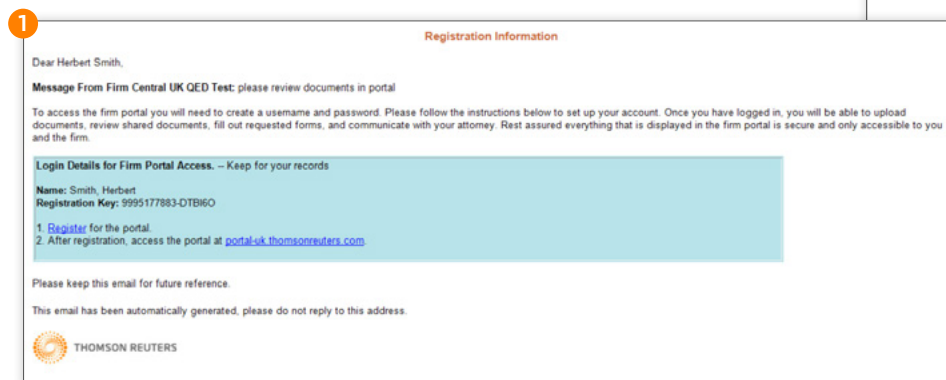
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Using the client portal

CLIENTS USING THE CLIENT PORTAL:

- 1 Receive a welcome email
- 2 Are provided with instructions on how to create a OnePass log-in
- 3 Can:
 - Review documents
 - Share messages with you
 - Upload their own documents



Name	Case	Date Shared	Status
Review Appointment of administrator v1 9_AL.vsd	Property for Smith	26/8/2015 12:53 PM	Incomplete
Review Fd Contacts additional info.docx	Property for Smith	26/8/2015 12:53 PM	Complete

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Time & billing

OVERVIEW

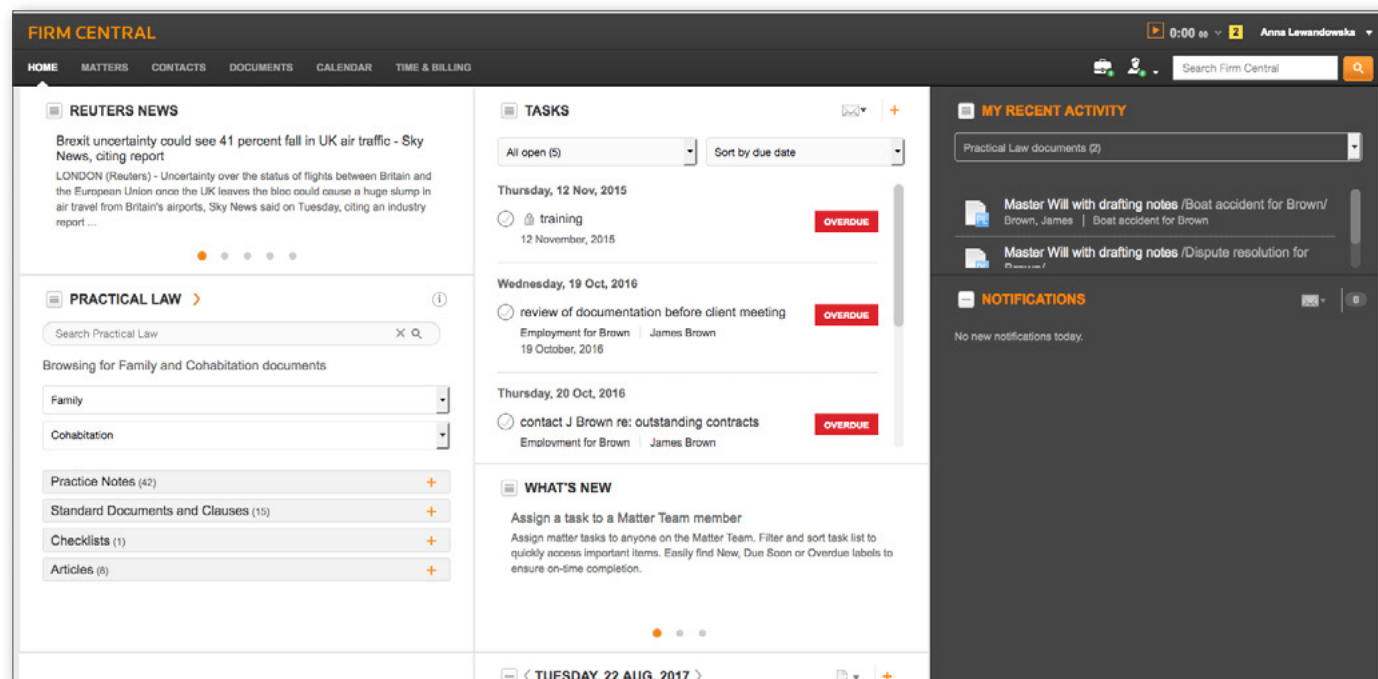
The Time & Billing section allows users to track time to matters, create and review prebilling and finalise and share invoices. In addition, payments received can be entered and tracked, and trust accounts can be added and managed.

In order to control access to sensitive information, relevant **permission levels** can be set up for the team members by the Admin user; choose from full or limited access, time & expenses only or view all financials. The permission level is set in the Admin view, Firm user management section, Time & Billing permissions.

USING THE TIMER TO RECORD TIME

There are two ways to enter time in Time & Billing - using a timer to track work in real time, or by manually entering time later. Time can be tracked under the Time Entry tab.

- 1 To track in real time, open the **Timer** located in the upper right hand corner. Click the **Play** button to start tracking time; when completed, click the **Pause** button. A pop-up will appear below the timer with a section to enter information about the time spent. When completed, click **Submit Time**.
- 2 To add an entry at a later time, click the **+ Time Entry** button near the upper right hand corner of the Timesheet. A new row will appear where detailed information can be entered. When complete, click **Save** in the lower left hand corner. Under the details section, the applicable billing rate will appear, or "FLAT" for a Flat Fee agreement or "CONT" for a contingency agreement.



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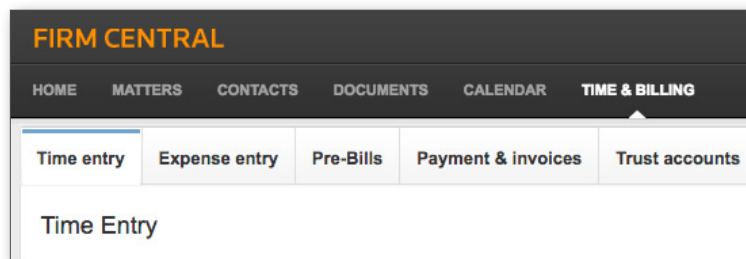
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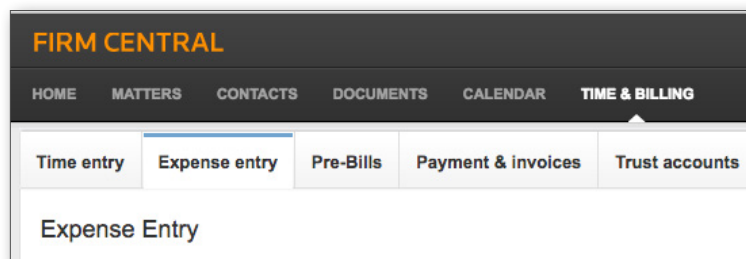
REVIEWING AND EDITING TIME ENTRIES

To review your time entries for any chosen time period (day / week view), open the **Time Entry** tab. The Timesheet will display with all applicable entries. To edit a time entry, locate the desired row. For the specific date, click on the “**time box**” to open it for editing then enter time in either increment-based or chronological format. When complete, click **Save** in the lower left hand corner.



ENTERING EXPENSES

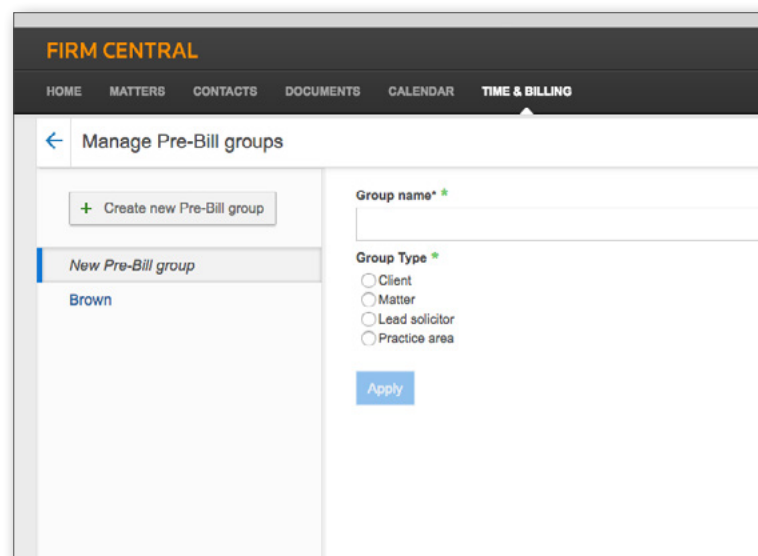
To enter an expense associated with a matter, navigate to the **Expense Entry** tab. New expenses can be added by clicking the **+ Expense** button in the upper right hand corner. A new row will appear, and detailed information (including expense codes and applicable VAT rate) can be entered. When complete, click **Save** in the lower left hand corner. To edit an entry, click the information in the relevant row to update. When finished, click **Save**.



CREATING AND MANAGING PRE-BILL GROUPS

In Time & Billing, separate matters can be grouped together when creating and reviewing Pre-Bills. To begin, access the **Pre-Bills** tab.

- 1 To create a Pre-Bill Group, click **Manage Pre-Bill Groups** link near the upper right hand corner.
- 2 On the next screen, click **+ New Pre-Bill Group** near the upper left hand corner. Enter the group name and select the type. Pre-Bills can be organized by client, matter, lead solicitor or practice area. When complete, click **Apply**. Based on the selected group type, new information will display to allow customization of the Pre-Bill Group. When ready, click **Save** near the bottom left of the window to complete the process.
- 3 Once created, Pre-Bill groups display across the top of the Pre-Bills tab. Pre-Bill Groups can be edited through the **Manage Pre-Bill Groups** link.



Time & billing

GENERATING AND REVIEWING PRE-BILLS

When you are ready to review your pre-bills, navigate to the Pre-Bills tab. Here, all the matters for the firm will be displayed near the top of the page in separate boxes showing the current outstanding bill totals. (Note that once a time entry is added to a pre-bill, it cannot be edited).

- 1 To create a pre-bill, click the **Select Matters** link and select the relevant matter from the listing; alternatively, you can create pre-bills for one of your pre-defined pre-bill groups, which will shade green with a checkmark to indicate selection (more than one can be selected at a time). Verify the date range and click **Generate Pre-Bills**.

- 2 Once created, the pre-bill will appear in the list on the bottom half of the window. To review a particular pre-bill, click the Pre-bill link- this will display the entries for that pre-bill, which can then be edited. To update a section or item under "Time Entries" or "Expense Entries", click on the relevant tab. When complete, click **Save** in the upper right corner.

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Time entry
Expense entry
Pre-Bills
Payment & invoices
Trust accounts
All accounts
Reports

Generate Pre-Bills

Select Pre-Bill Group
☐ Include matters with no new activity

All Matters (133)

UNBILLED TIME
£3,302.56
Oldest item: 14/03/2017

Brown (0)

UNBILLED TIME
£1,925.00
Oldest item: 14/03/2017

Enter Date Range

14/03/2017
30/09/2017
Generate Pre-Bills

Pre-Bills

Search Pre-Bills

	Start	End	Lead	Client name	Matter name
<input type="checkbox"/>		17/07/2017		James Brown	Employment for Brown
<input type="checkbox"/>		07/09/2017		James Brown	Boat accident for Brown
<input type="checkbox"/>		31/07/2017		Darren Bichan	Bichan Buggies UK
<input type="checkbox"/>		31/08/2017		clientinvitetest test	test
<input type="checkbox"/>		30/09/2017		A1 A1	IBTest

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- In addition, the final invoice can be reviewed and edited in the **Invoice total** tab. Customer-specific adjustments can be made, including adding discounts, finance charges or write-off. To edit, click the relevant action button- when complete, click **Save**. The total will now be updated according to the recorded discount or addition of finance charges, and will show any outstanding balance from previous invoicing.

FIRM CENTRAL 0:00 2 Anna Lewandowska

HOME MATTERS CONTACTS DOCUMENTS CALENDAR **TIME & BILLING**

← **Bichan Buggies UK (3033)** Fee arrangement: Hourly
Darren Bichan Billable date range: to 30/06/2017

Invoice total **£22.00**

Time entries Expense entries **Invoice total** Finalise Deliver Invoice Remove Save

Invoice Summary View Pre-Bill Write Off

Description	Adjustments	Charges and Fees
Hourly Fees		0.00
Expenses		20.00
Discount Discount is applied to Fees	Add	
VAT (Standard) @ 10%		2.00
Finance Charges	Add	--
Invoice Total		22.00
Outstanding Balance		312.00
Trust Balance		500.00

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Pre-bill editing

ADDING TIME OR EXPENSE ENTRIES TO AN EXISTING PRE-BILL

Navigate to pre-bill; if new time or expense entries have been added to this pre-bill, a message is displayed in top-right corner, listing the total value of new time entries; you can add the new time entry in this view by clicking the **Add Time Entries** link:

FIRM CENTRAL

HOME MATTERS CONTACTS DOCUMENTS CALENDAR **TIME & BILLING**

← **Employment for Brown (2267)** Fee arrangement: Hourly
James Brown Billable date range: to 17/07/2017

Time entries Expense entries Invoice total

All Users

Time Entries ⓘ 3 time entries totaling £0.00 are not included with this pre-bill. [Add Time Entries](#)

Date	User	External Narrative	Details	Time	Billable	
No data available in table.						
Total					0:00	£0.00

Invoice Adjustments ⓘ

Adjust	Time	Total
Total		
		£0.00

Finalise Deliver Invoice

+ Time Entry Save

After clicking **Add Time Entries** link (as above), a modal listing the time entries that can be included appears; you can select the entries you want to add and click **Add to Pre-Bill**:

Time Entries X

Select time entries to include with this pre-bill Total Selected **£0.00**

<input type="checkbox"/>	Date	User	External Narrative	Activity/Task	Rate	Time	Billable
<input checked="" type="checkbox"/>	THU 16/03	Anna Lewandowska		A106 / Task	£0.00	0:06	0.00
<input type="checkbox"/>	TUE 14/03	Anna Lewandowska	test	A109 / JA00	£0.00	0:06	0.00
<input type="checkbox"/>	TUE 14/03	Anna Lewandowska	test	A109 / Task	£0.00	0:06	0.00

Add to Pre-Bill Cancel

Pre-bill editing

The newly-added entry appears on the pre-bill; click **Save** to confirm the addition:

FIRM CENTRAL

HOME MATTERS CONTACTS DOCUMENTS CALENDAR **TIME & BILLING**

Employment for Brown (2267) Fee arrangement: Hourly
James Brown Billable date range: to 17/07/2017

Invoice total: £3,190.00

Time entries Expense entries Invoice total

All Users

Time entries have been added to pre-bill. Close

+ Time Entry **Save**

Date	User	External Narrative	Details	Time	Billable	Adjust	Time	Total
Thu 16 Mar	Anna Lewandowska	Enter message to client	A106 / Task	0:06	0.00	Add	0:06	0.00
Total				0:06	£0.00		0:06	£0.00

Confirmation message appears above the time entry:

FIRM CENTRAL

HOME MATTERS CONTACTS DOCUMENTS CALENDAR **TIME & BILLING**

Employment for Brown (2267) Fee arrangement: Hourly
James Brown Billable date range: to 17/07/2017

Invoice total: £3,190.00

Time entries Expense entries Invoice total

All Users

2 time entries totaling £0.00 are not included with this pre-bill. Add Time Entries

+ Time Entry **Save**

Date	User	External Narrative	Details	Time	Billable	Adjust	Time	Total
Thu 16 Mar	Anna Lewandowska	Enter message to client	A106 / Task	0:06	0.00	Add	0:06	0.00
Total				0:06	£0.00		0:06	£0.00

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Pre-bill editing

New expense entries can be added to an existing pre-bill in exactly the same way, by clicking **Add Expense Entries** link:

FIRM CENTRAL 0:00 2 Anna Lewandowska

HOME MATTERS CONTACTS DOCUMENTS CALENDAR **TIME & BILLING**

← **Boat accident for Brown (3035)** Fee arrangement: Hourly
James Brown Billable date range: to 07/09/2017

Invoice total **£1,672.00**

Time entries **Expense entries** Invoice total Finalise Deliver invoice

All Users + Expense Save

Expense Entries 2 expense entries totalling £1,750.00 are not included with this pre-bill. [Add Expense Entries](#) **Invoice Adjustments**

Date	User	External Narrative	Code	Total	VAT Rate	Details	Adjust	Total
Thu 07 Sep	Anna Lewandowska	Enter message to client	X125 1 x 1,500.00	1,500.00	Standard		Add	1,500.00
Mon 04 Sep	Anna Lewandowska	Enter message to client	X125 1 x 20.00	20.00	Standard		Add	20.00
Total				£1,520.00				£1,520.00

Time or expense entries can also be deleted from the pre-bill: click the “x” symbol beside the entry you want to remove.

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Pre-bill editing

CHANGING USER ON TIME OR EXPENSE ENTRIES (PRE-BILL)

You can change the name of team member who logged time or expense entries even after the pre-bill is generated; go to relevant Pre-bill and select the new user name from the drop-down:

The screenshots show the Firm Central interface for editing a pre-bill. The top screenshot shows the 'Expense entries' tab with a dropdown menu open for selecting a user. The bottom screenshot shows the same interface with the dropdown menu closed and the user 'Anna Lewandowska' selected in the 'User' column of the 'Expense Entries' table.

Date	User	External Narrative	Code	Total	VAT Rate	Details
Thu 07 Sep	Anna Lewandowska	Enter message to client	X125 1 x 1,500.00	1,500.00	Standard	
Mon 04 Sep		Enter message to client	X125 1 x 20.00	20.00	Standard	
Total				£1,520.00		

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Pre-bill editing

CHANGING DATE ON TIME OR EXPENSE ENTRIES (PRE-BILL):

Date can be amended by clicking on the date link: calendar feature appears where you can select a new date:

The screenshot shows the 'FIRM CENTRAL' interface with the 'TIME & BILLING' tab selected. The main heading is 'Boat accident for Brown (3035)'. Below it, there are tabs for 'Time entries', 'Expense entries', and 'Invoice total'. The 'Time entries' tab is active, and a calendar for July 2017 is displayed, allowing the user to select a new date for the entry. The calendar shows dates from 1 to 31, with the 1st highlighted. The 'Invoice total' is £1,672.00. The 'Time Entries' table has columns for Date, User, External Narrative, Details, Time, and Billable. The 'Invoice Adjustments' table has columns for Adjust, Time, and Total.

The screenshot shows the 'FIRM CENTRAL' interface with the 'TIME & BILLING' tab selected. The main heading is 'Boat accident for Brown (3035)'. Below it, there are tabs for 'Time entries', 'Expense entries', and 'Invoice total'. The 'Expense entries' tab is active, and a calendar for September 2017 is displayed, allowing the user to select a new date for the entry. The calendar shows dates from 1 to 30, with the 7th highlighted. The 'Invoice total' is £1,672.00. The 'Expense Entries' table has columns for Date, User, External Narrative, Code, Total, VAT Rate, and Details. The 'Invoice Adjustments' table has columns for Adjust, Total, and Total.

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Time & billing

FINALISING AND GENERATING INVOICES

Once the pre-bill is reviewed and ready for the client, you can finalise it and create the invoices. From the **Pre-Bill** tab in Time & Billing, select the relevant matter or matters from the list by checking the box in the left column. When in "Pre-Bill" status, you can save a copy for submission later by clicking **Finalise**. Otherwise, when ready, select the required matters from the list and click **Generate Invoice**. The invoice or invoices are now created and can be tracked under the **Payment & Invoices** tab. Copies will be automatically saved in the Documents folder for that matter.

FIRM CENTRAL

HOME MATTERS CONTACTS DOCUMENTS CALENDAR **TIME & BILLING**

Time entry Expense entry **Pre-Bills** Payment & Invoices Trust accounts All accounts Reports

Generate Pre-Bills

Select Pre-Bill Group ☐ Include matters with no new activity

All Matters (123) **Brown (5)**

UNBILLED TIME **£937.56** UNBILLED TIME **£0.00**

Oldest Item: 14/03/2017 Oldest Item: 14/03/2017

Enter Date Range 31/08/2017 **Generate Pre-Bills**

Pre-Bills

Search Pre-Bills

☐ Start ☐ Pre-Bill Group ☐ Include matters with no new activity

Matter name	Matter #	Billing Type	Total, £	Status
Employment for Brown-Bowman	3779	Hourly	6,187.50	Pre-Bill
Employment for Brown	2267	Hourly	3,190.00	Pre-Bill
Employment for Brown-Bowman	3779	Hourly	2,722.50	Pre-Bill
Bichan Buggies UK	3033	Hourly	550.00	Pre-Bill
Incorporation of eCommerce Ltd	3349	Hourly	270.00	Pre-Bill

Finalise Remove Deliver Invoice

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INVOICE REVERSAL

You can reverse invoices in Firm Central (with the exception of contingency fee type); you will be asked to reverse all previous transactions first – as a result, the invoice returns to pre-bill stage.

Access the invoice you want to reverse and click Void invoice button in top-right corner: if the invoice has transactions attached to it, a warning message will be displayed, asking you to reverse all transactions first:

The screenshot displays the Firm Central web application. At the top, the navigation bar includes 'HOME', 'MATTERS', 'CONTACTS', 'DOCUMENTS', 'CALENDAR', and 'TIME & BILLING'. The main header shows 'Incorporation of eCommerce Ltd' and 'Thomas Smith'. Below this, 'Invoice #48' is displayed with an amount of £1,000.00. A 'Transactions' table lists a payment on 17/5/2017. The 'Void Invoice' button in the top right is highlighted with a red circle. A warning message is shown: 'You must first reverse all transactions to void this invoice. Certain Billing Arrangement Invoices, such as Contingency, cannot be voided.' The bottom section shows a preview of the invoice document, including contact details for Thomas Smith and JMB, and a summary of the invoice.

Payment date	User	Type	Description
17/5/2017		Electronic transfer	

Thomas Smith		JMB	
Hackney		100 Chancery Lane London WC2A 1 EL	
London, n1		Bank details: HSBC 7897875809184 sort: 78-87-87 Clerkenwell Branch	
claudio.digregorio@tr.com			
02074444444444			

Thomas Smith		JMB	
Invoice Date	May 17, 2017	Invoice Number	48
Due Date	Due Upon Receipt	VAT number	67677 7586 7854

Incorporation of eCommerce Ltd 3349

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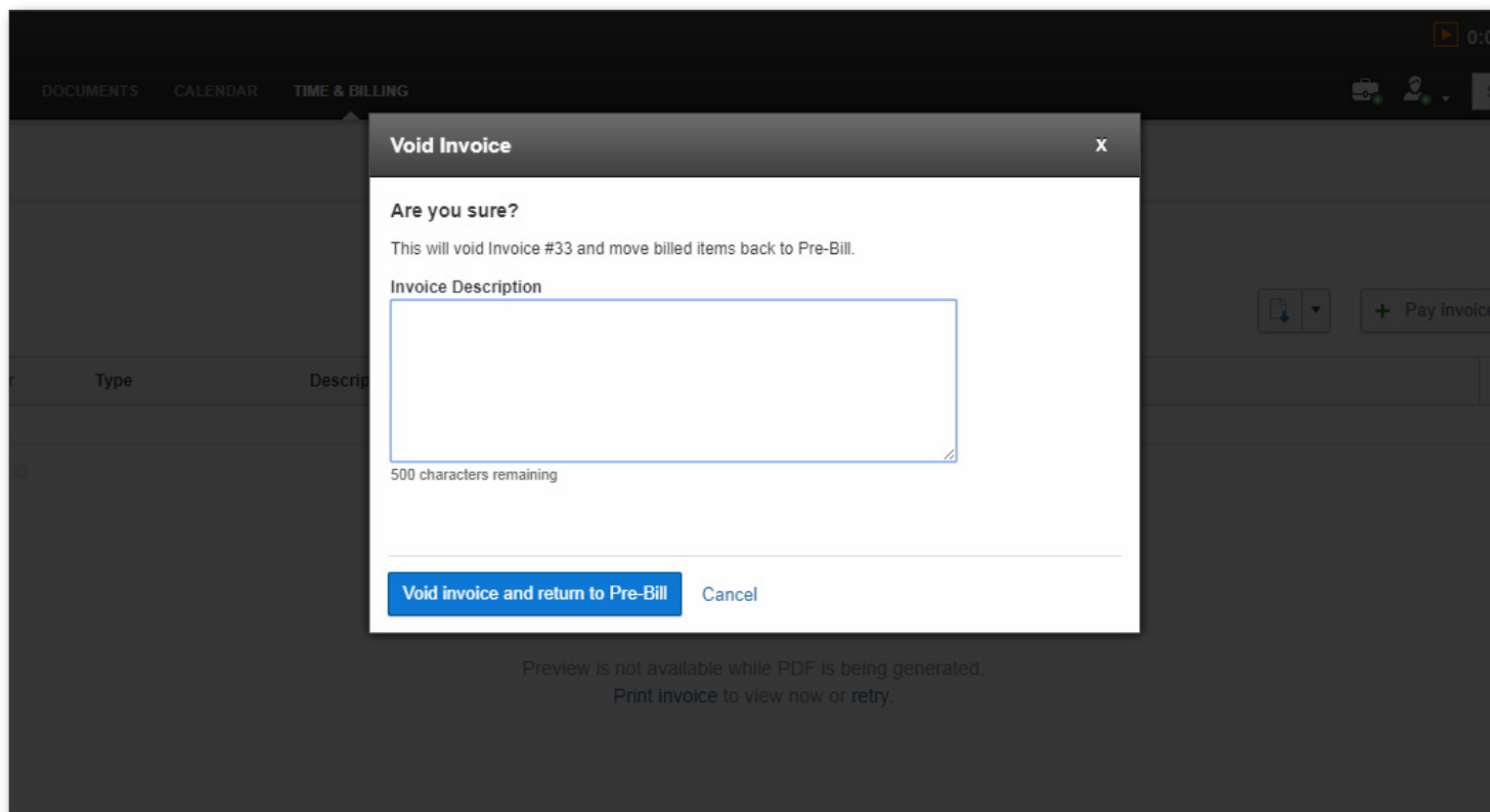
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Upon clicking the Void button, if the invoice can be reversed, pop-up appears to confirm user's intention:



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MANAGING CLIENT MONEY

Time & Billing allows for the creation and tracking of Trust Accounts. To access this feature, click the **Trust Accounts** tab.

- 1 To create a Trust Account, click **+ Trust Account** near the upper right hand corner.

FIRM CENTRAL 0:00 2 Anna Lewandowska

HOME MATTERS CONTACTS DOCUMENTS CALENDAR **TIME & BILLING**

Time entry Expense entry Pre-Bills Payment & invoices **Trust accounts** All accounts Reports

Trust accounts Balance **£1,712,651.40**

Search Trust Accounts (9) ☐ Include Closed Accounts **+ Add trust account**

<input type="checkbox"/>	Account name	Client name	Matter name	Balance, £
<input type="checkbox"/>	Brown-Bowman Trust	Brown-Bowman	Employment for Brown-Bowman	5,000.00
<input type="checkbox"/>	Bichan Buggies UK Trust	Darren Bichan	Bichan Buggies UK	500.00
				0.00

- 2 A new window will appear where you can enter relevant information including minimum balance amount, de minimis amount and instructions whether to auto-deduct payments from trust account when invoice is generated and whether or not interest should be applied. Once complete, click **Create**.

FIRM CENTRAL 0:00 2 Anna Lewandowska

HOME MATTERS CONTACTS DOCUMENTS CALENDAR **TIME & BILLING**

Time entry Expense entry Pre-Bills Payment & invoices **Trust accounts** All accounts Reports

Create new trust account

Client *

Matter *

Account name *

Note: information applicable to client money interest: default de minimis amount applicable to all matters, indication whether or not interest should be applied and the relevant interest rates with “applicable from” dates can be specified by the Admin users in Admin, Time & Billing section, **Client money interest** tab .

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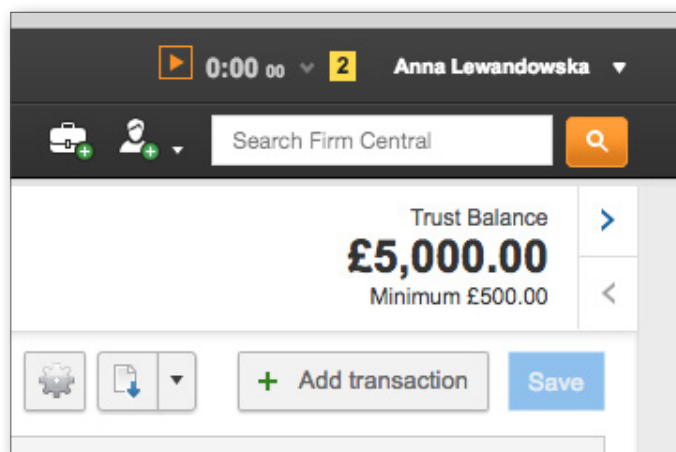
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- 3 Once a trust account is created, any account activity can be recorded to that account. To manage a particular account, select it from the list on the **Trust Accounts** tab.



- 4 To record a deposit or disbursement into the Trust Account, click **+ Transaction** near the upper right hand corner. A new row will appear where you can enter the relevant information. When complete, click **Save** – the new entry will now be applied to the trust account and the balance will automatically update.

- 5 To calculate interest on Client Money, select the Trust Account by clicking on the hyperlinked account name; in this view, you can see the details of transactions applicable to this trust. Click on the **gear** symbol and select "Calculate interest" option from the drop-down menu (you also have options to edit or close the account at this point). A pop-up will open where you can select the date range for interest calculation – click **Calculate** to display interest earned and paid to-date, date when interest was last paid and the interest earned in the selected time range. Click **Post Interest** – it will be added to the Trust Account summary page.

FIRM CENTRAL

HOME MATTERS CONTACTS DOCUMENTS CALENDAR **TIME & BILLING**

BROWN-BOWMAN TRUST
Date Opened: Aug. 8, 2017 Open
Employment for Brown-Bowman (BB-1766211) Brown-Bowman

Search transactions: 22/08/2017

Trust Balance **£5,000.00**
Minimum £500.00

Date	User	Type	Invoice #	Description	Debits, £	Credits, £	Balance, £
10/08/2017		Deposit	56	Reversal: Payment of invoice #56	(5,000.00)		5,000.00
10/08/2017		Disbursement	56	Payment of invoice #56	5,000.00		0.00
08/08/2017		Deposit		Opening Balance		5,000.00	5,000.00
					£0.00	£5,000.00	£5,000.00

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EDITING OR CLOSING A TRUST ACCOUNT

To close a Trust Account, navigate into the relevant Trust Account summary page. Click the **gear** logo near the upper right hand corner- options to edit or close (or calculate interest) will be displayed in the drop-down menu.

DOWNLOADING ACCOUNTS ACTIVITY

To print, download or export information from the **Trust Accounts** or **All Accounts** section, select relevant option from the drop-down menu with the folder symbol- on the left of the **+ Trust Account** button. Select relevant accounts by ticking the boxes beside accounts' name- if no selection is made, all accounts will be selected and printed, downloaded or exported by default.

REPORTING ON TIME & BILLING ACTIVITY

A selection of reports on Time & Billing activity is available in the **Reports** tab; you can view time by matter, client or user; expenses by matter; accounts receivable; Trust Accounts balances; collection realisation by matter or client; write-offs and financial summary by matter.

RECEIVING AND ENTERING PAYMENTS

Time & Billing allows for the tracking of invoices and payments in the **Payments & Invoices** tab. When a payment is received for an invoice, it can be entered into the system in the "Pay Invoice" box. Enter all relevant information: invoice number, the amount, form of payment and description. When complete, click **Pay Invoice** to save. Alternatively, tick the box beside the invoice listing in the lower part of the screen and click **Apply payment**. The payment will now be applied to the invoice. All invoices can be searched using the list below the "Pay Invoice" box- click on the invoice number to view the detailed list of transactions and preview the invoice; you can also apply payment or make further adjustments in this view.

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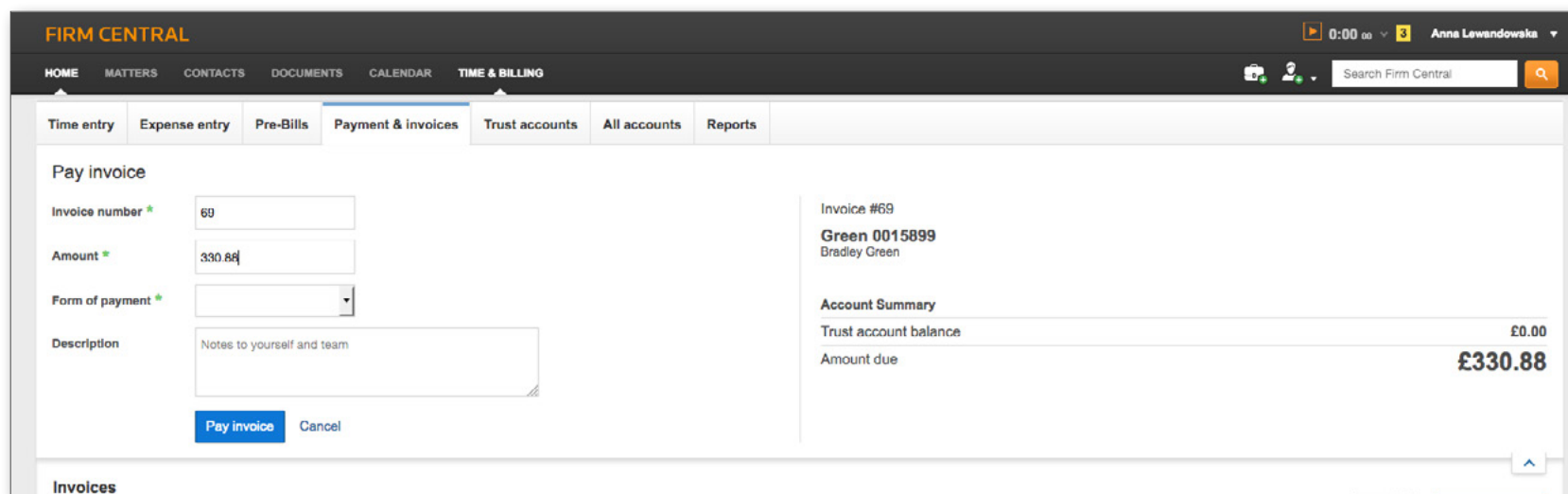
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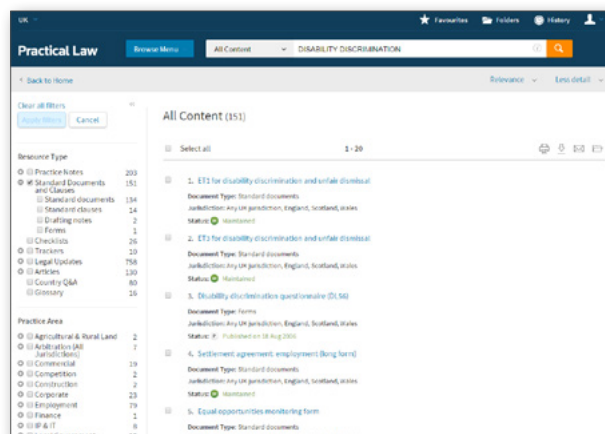
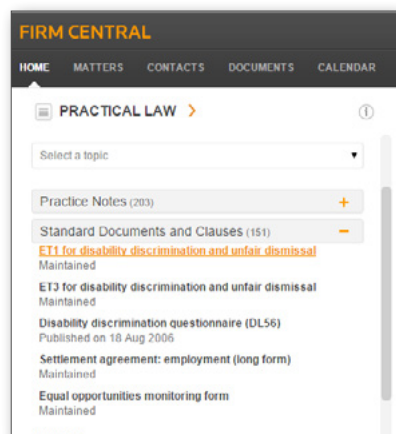
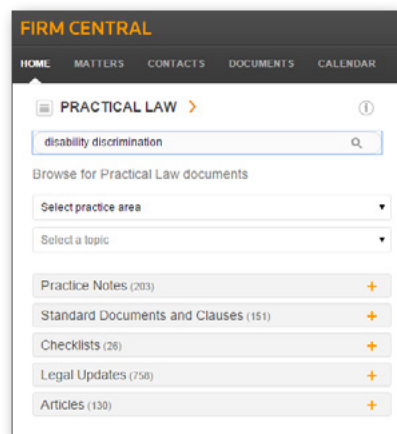




Searching Practical Law content within Firm Central

As part of your subscription to Firm Central, you conveniently have the ability to search Practical Law's market-leading know how and precedents without leaving Firm Central. To view any documents, you will need an additional subscription to Practical Law – please speak to your Account Manager or contact Customer Support if you don't have an existing Practical Law account.

You can search Practical Law content using keyword search, practice area and topic selections or combination of all three.

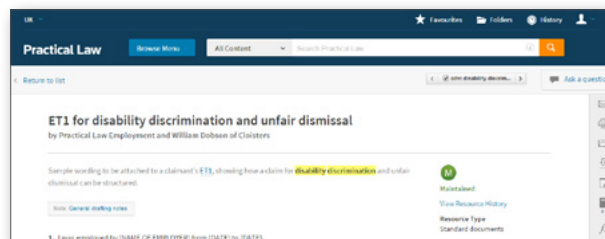
KEYWORD SEARCHING



To get started, enter your search terms under the **Practical Law** heading and hit Enter. Your results will be returned below and split into resource types to help you get to the right document quickly. Click the  icon next to the resource type (e.g. **Standard Documents and Clauses**). Notice the icon changes to . Simply click this icon again to collapse the content type filter.

The top 5 most relevant documents under each resource type will be displayed within Firm Central. If the document you're looking for is not shown, click **view all**. This will open Practical Law in a new tab with all of your search results visible. You will need to log in to Practical Law first if you haven't done so already.

Back in Firm Central, if you find the document you need in the top 5 search results and click to view it, this will also take you to the Practical Law site in a new tab but this time you'll go directly to the resource.



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PRACTICE AREA AND TOPIC FILTERS

You also have the option to focus your search using the Practice Area and Topic filters just below the search bar. Click the arrow in the 'Select practice area' section (1) to make a selection from the dropdown menu, reflecting Practical Law's own Practice Area list.

Below this Practice Area filter, there is the Topic filter (2). You can choose to leave this as it is (as long as there is also a keyword term selected) or make a selection in the same way as the Practice Area filter. However, you won't be able to use the Topic filter until you first make a Practice Area selection as this automatically updates with the Topics you'll find within each Practical Law Practice Area. Please note you will not be able to run a "Practice Area" search only.

PRACTICAL LAW >

disability discrimination

Browse for Practical Law documents

1 Select practice area

2 Select a topic

Practice Notes (203) +

Standard Documents and Clauses (151) +

Checklists (26) +

Legal Updates (758) +

Articles (130) +

PRACTICAL LAW >

disability discrimination

Browsing for Employment and Discrimination: Employment documents

Employment

Discrimination: Employment

Practice Notes (27) -

Disability discrimination
Maintained

Disability discrimination: the definition of disability
Maintained

Disability discrimination: reasonable adjustments
Maintained

Discrimination in employment: types of discrimination
Maintained

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When viewing all your search results within Practical Law (the “**View All**” option), resource type structure and selections for Practice Area (3) and Topic (4) made within Firm Central are preserved.

Clear all filters << **Apply filters** **Cancel**

Resource Type

- ☒ Practice Notes 27
 - ☐ Practice note: overview 4
 - ☐ Practice notes 23
- ☐ Standard Documents and Clauses 10
 - ☐ Checklists 7
- ☒ Legal Updates 394
- ☒ Articles 32
- ☐ Glossary 11

Practice Area

Employment: Discrimination: Employment

Jurisdiction

- ☐ Any UK jurisdiction 25
- ☐ England 25
- ☐ Scotland 24
- ☐ Wales 25
- ☐ European Union 1

[More Jurisdictions](#)

Apply filters **Cancel**

All Content (27) >>

☐ Select all 1 - 20

☐ 1. Disability discrimination

Document Type: Practice notes

Jurisdiction: Any UK jurisdiction, England, Scotland, Wales

Status: M Maintained

This note examines disability discrimination in employment under the Equality Act 2010. It should be read in conjunction with Practice notes, Disability discrimination: the definition of disability and Disability discrimination: reasonable adjustments.

...This seems contrary to the traditional understanding of comparators in d 3 : discrimination claims. If an employer acts because of things "stemming from" a disability, rather than because of the existence of the disability itself, this is not truly direct discrimination. Rather, it is the kind of action that the DDA 1995's disability-related discrimination provisions and the EqA 2010's discrimination arising from disability and indirect discrimination...

...The EqA 2010, which implements the disability aspects of the Equal Treatment Framework Directive (2000/78/EC) (Framework Directive), prohibits direct disability discrimination, indirect disability discrimination, discrimination arising from disability, disability harassment and victimisation in the workplace. It also puts employers under a duty to make reasonable adjustments for disabled employees and job applicants who are placed at a substantial disadvantage because of their disabilities...

...In fact, the employer could even avoid direct discrimination liability by showing that it rejected the applicant because of the consequences of the disability, rather than simply the existence of the disability. However, the employer would then most likely have to show objective justification to avoid liability for indirect discrimination (see Indirect discrimination) and discrimination arising

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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.



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Being an administrator

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.

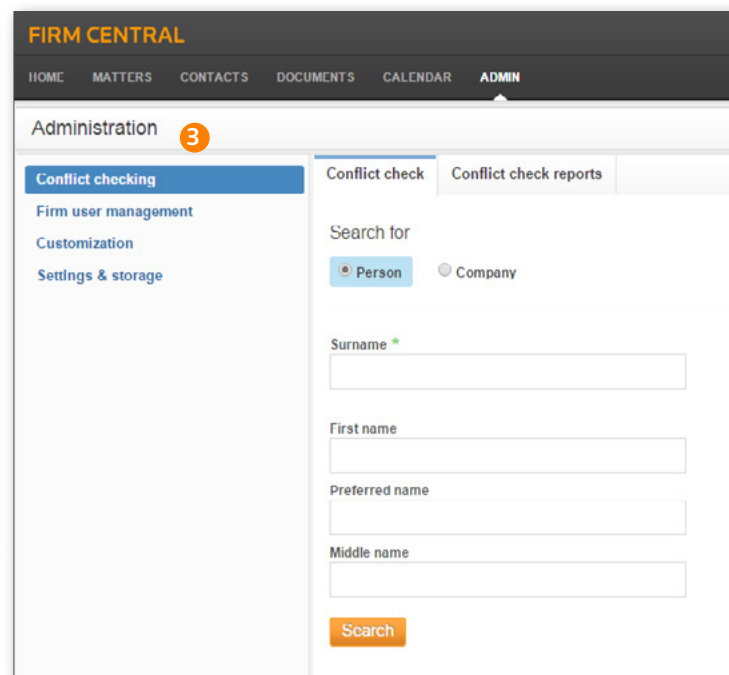
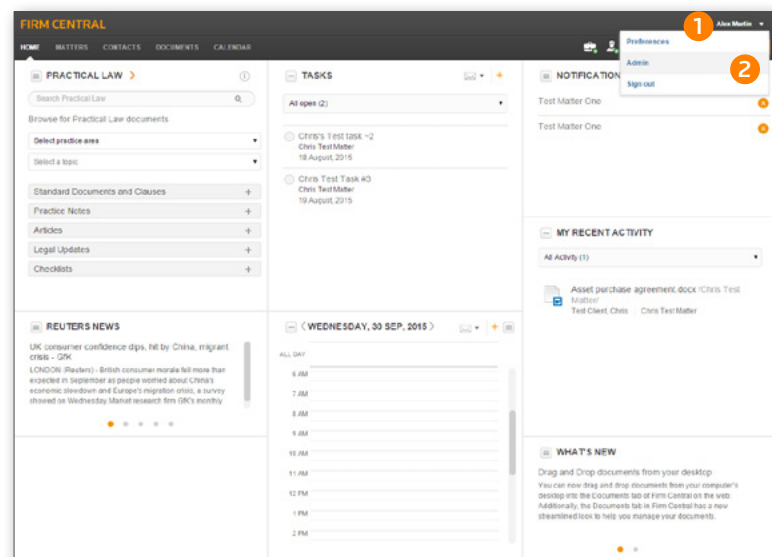
Conflict Checking – You must be signed in to Firm Central as an Administrator to use the Conflict Checking feature. This allows you to search all content on the site, other than private contacts, for references to a person or business, then create a report from the result.

Firm User Management – You can add users to all or multiple matters, designate their role 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 as necessary.

User Management opens My Account in a new tab or browser so you can add or delete users and administrative rights.

Customisation options allow you to change the default settings and customise matter and contact input forms. Default Matter Permissions allows the Administrator to set permissions for each user in your firm.

Settings options enable you to specify the default firm name and standard week start time in the Calendar. 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.



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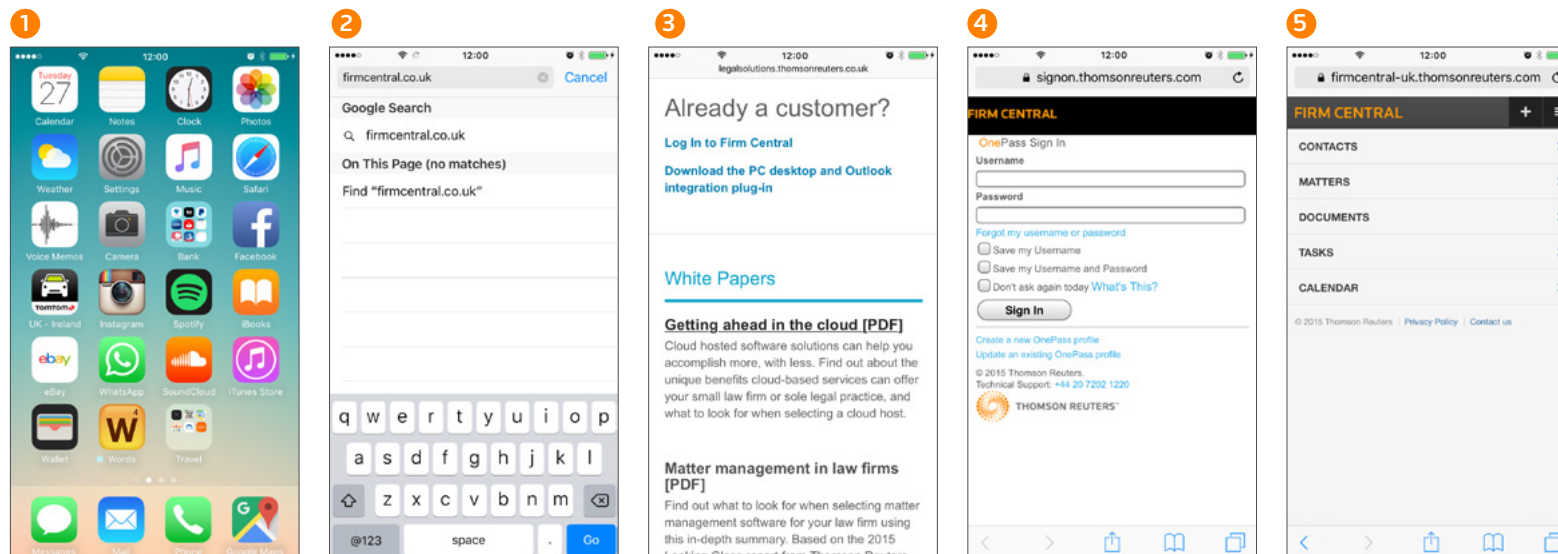
DESKTOP PLUG-IN

Using Firm Central on the go

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 whenever you're online. All you have to do to enable your tools to work off-site is to create a shortcut to the application for either your iPhone®/iPad® or Android™ smartphone.

IPHONE/IPAD

- 1 From the home menu, select **Safari**.
- 2 From Safari, type firmcentral.co.uk in the browser, then tap **Go**.
- 3 From the Firm Central website, scroll down to where it asks if you're already a customer and tap 'log in to Firm Central'
- 4 Log in to your account and click **Sign In**.
- 5 From this screen, select the **Share** icon.



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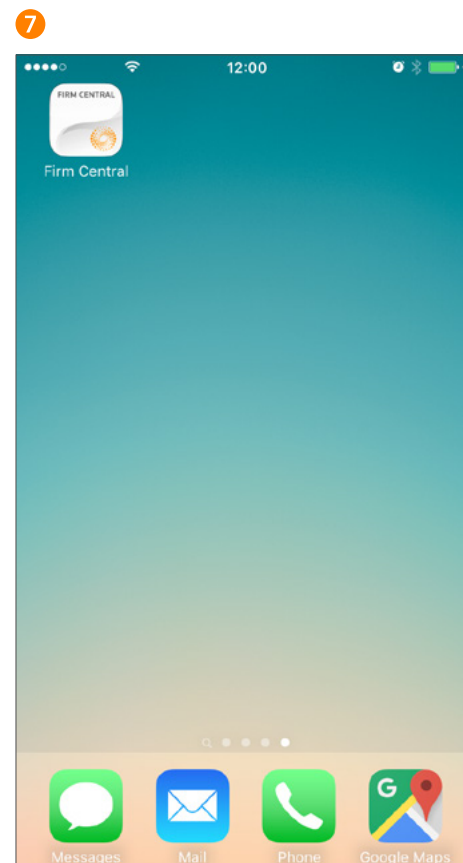
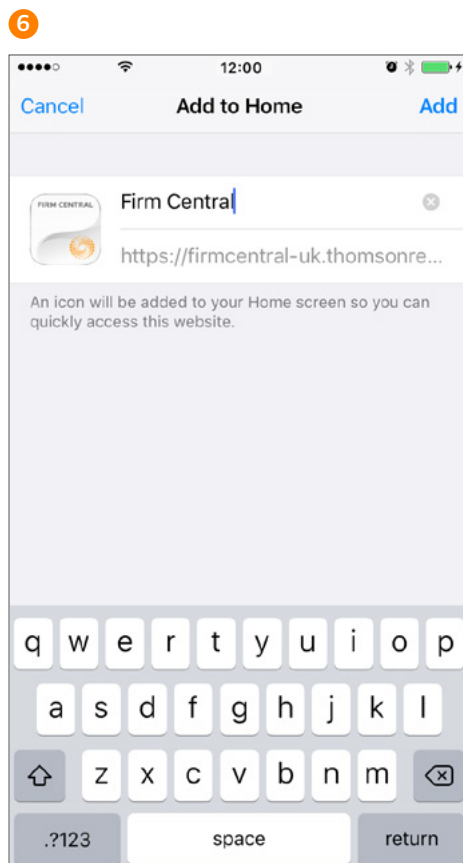
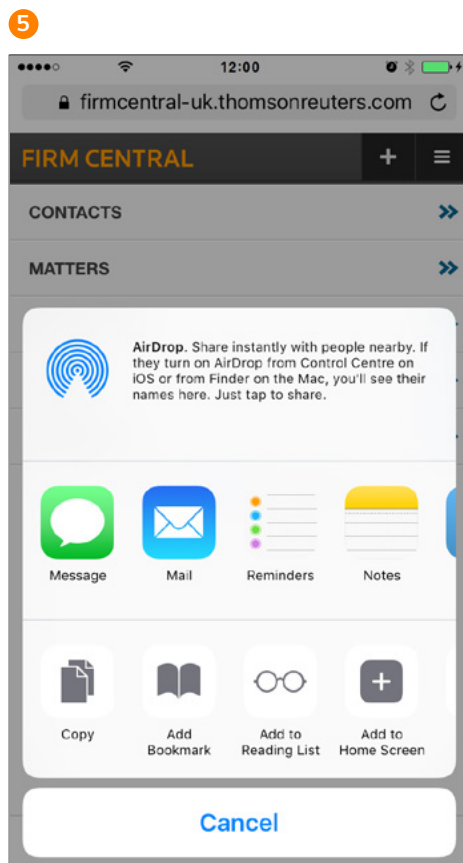
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Using Firm Central on the go

IPHONE/IPAD (CONTINUED)

- 5 Select the **Add to Home Screen** button.
- 6 Click the **Add** button.
- 7 Your new shortcut link will appear on your screen.



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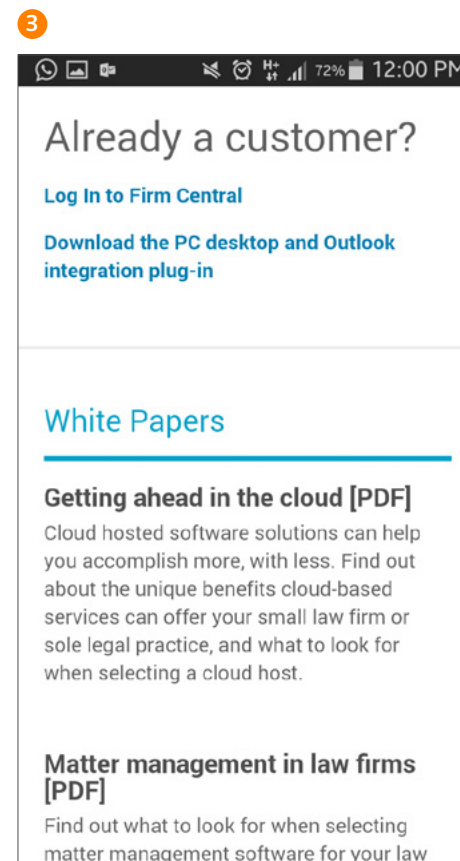
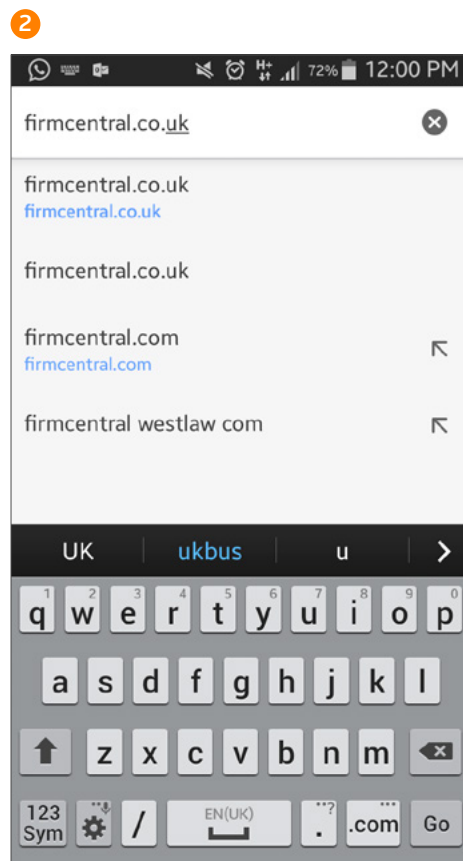
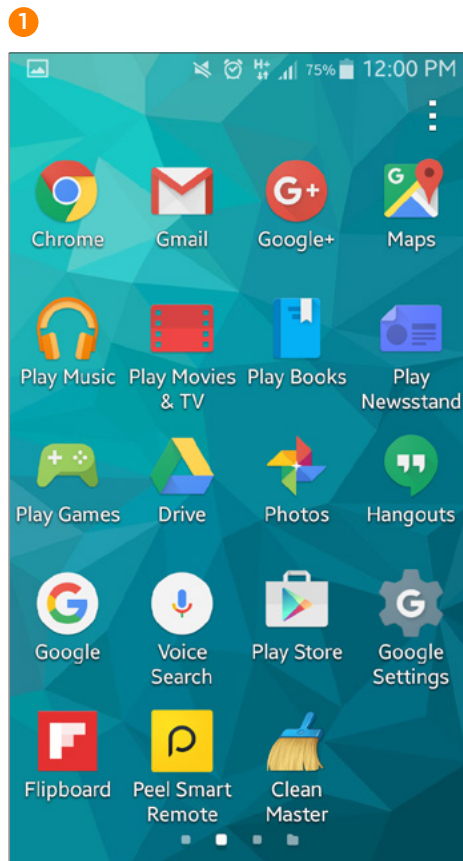
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Using Firm Central on the go

ANDROID

- 1 From your Apps open your web browser (e.g. Google Chrome).
- 2 In the browser, type in firmcentral.co.uk
- 3 From the Firm Central website, scroll down to where it asks if you're already a customer and tap 'log in to Firm Central'.



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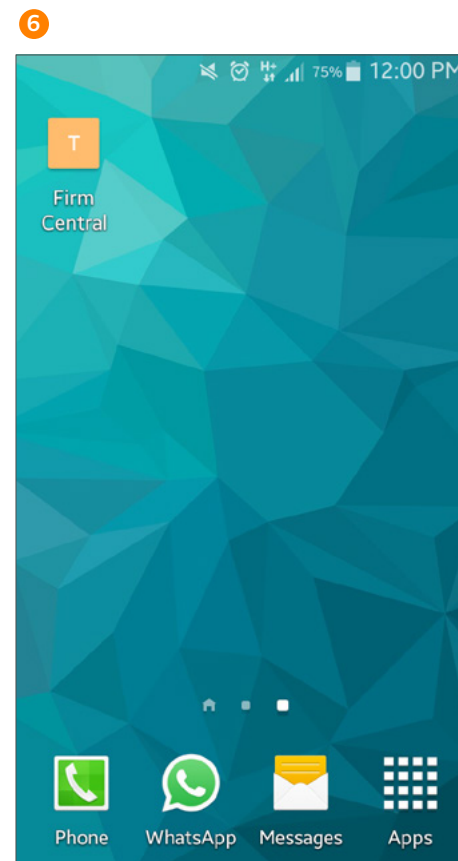
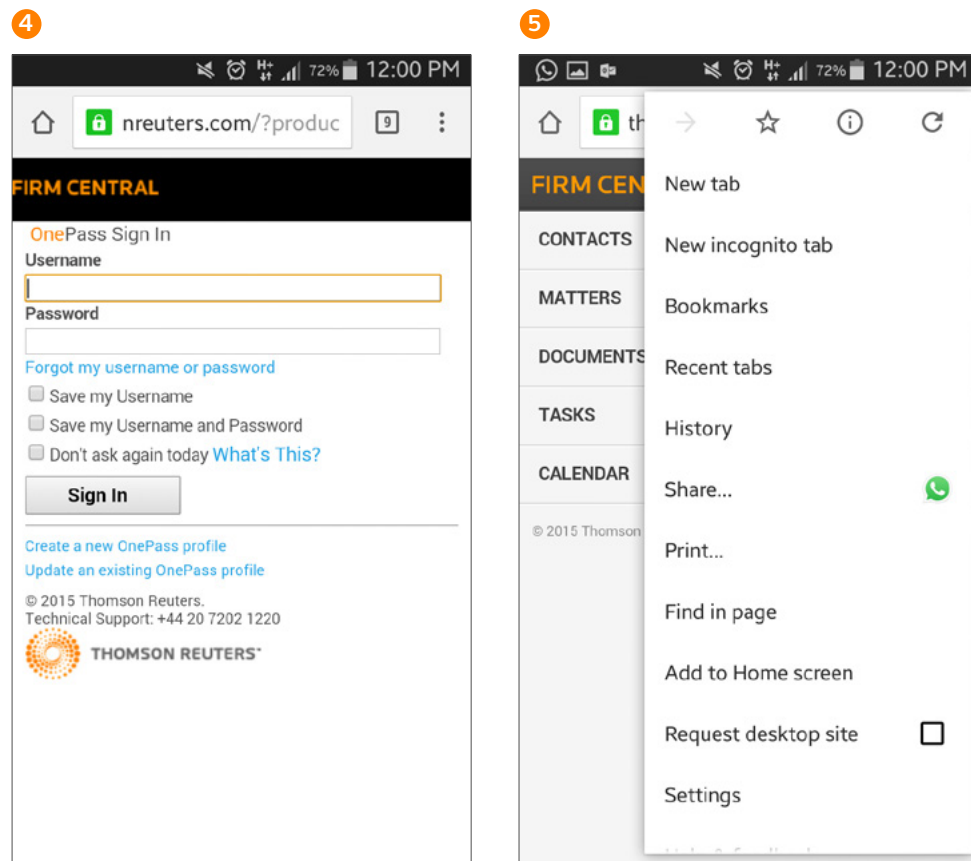
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Using Firm Central on the go

ANDROID (CONTINUED)

- 4 Log in to your account and tap Sign In.
- 5 Once signed in, tap the menu button and then tap Add shortcut to home screen.
- 6 Your new shortcut link will appear on your screen.



Download the Outlook and Desktop Plug-in (for PC users)

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If you're a PC user, you can easily integrate Firm Central into your Windows Explorer and Outlook applications. You can then quickly drag-and-drop documents and emails into relevant Matter folders in Firm Central and share with others on the Matter team. You will also be able to create and view matter events in your Outlook calendar.

To enable the integration, you will need to download and install the Desktop Integration Plug-In. Visit firmcentral.co.uk and follow the links to download the PC desktop and Outlook integration plug-in.

Full instructions on how to install the plug-in for both single and multiple users are available on the website. If you're unable to install the plug-in due to lack of administrator privileges, you should consult your IT manager first.

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

- Within any open Microsoft program (e.g. Word), when saving your document, Firm Central matter folders to which you have access will appear as locations in which the document can be saved.

OUTLOOK INTEGRATION (TWO-WAY SYNC OF EVENTS BETWEEN FIRM CENTRAL AND OUTLOOK)

Outlook integration enables you to view, create and edit matter events in your Outlook calendar - matter events will be visible in both Outlook and Firm Central calendars.

How to copy an email from Outlook into Firm Central

- Select email to be copied.
- 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 copy 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 copy 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.

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Contact Us

Visit legal-solutions.co.uk/firmcentral

Phone + 44 (0)345 600 9355

Email customersupport.firmcentral@thomsonreuters.com

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