

# Firm Central – Transcript

## How to Create a Contract and Matter in Firm Central

Hi, I'm Lance. Today I'll be showing you how to create a contact and a matter in Firm Central.

There are two ways to create a contact. Click New Contact from the Contacts drop down menu in the banner, or 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, or business, and role type.

You must fill in the first name and last name fields. All the other information is optional.

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 section is public. Click Save.

Now, let's create a matter. Click the Add Matter icon in the banner, or click the Matters tab in the Firm Central header and then click New Matter. You will notice there are only a couple of required fields. You can include as much, or as little detail as you wish. You can always come back to edit or add more information at another time. In the matter details, you must fill in a matter name and the date opened. It defaults to today's date, but you can change it by clicking on the calendar icon.

You must 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, and then fill in the Create New Client form.

Firm Central automatically assigns a matter ID for each new matter created. But, you have the option to include an alternate ID. The remaining information is all optional. Matter description, select a practice area from the drop down menu, enter opposing party contact information and court information.

For a best practice tip, you can search and filter your matters by practice area. Just fill in this field for complete display of matters by practice.

Your Firm Central administrator has created default settings for matter permissions and matter team. For the matter permissions, all you do is choose the role for a specific person using the drop down list next to his or her name. Owners can create, edit, review, and delete matter and matter documents. Editors can edit matter details and review documents. Editors cannot delete a matter, but can delete documents he or she added to the matter. Read Only can view all matter information, but cannot edit or delete. And Denied Access users cannot see any portion of the matter.

To the far right is the option to select the matter team. Lastly, click Save.

If you have any additional questions on using Firm Central, please visit [firmcentral.com](http://firmcentral.com) and click on the Support tab.