Firm Central – Transcript

How to Customize Firm Central for Your Firm

Hi, my name is Lane, and today I'd like to show you some features from Firm Central.

Let's take a look at customization within Firm Central. Even though firms may share a common practice area, all firms tailor the management of their practice based upon internal resources for an optimized workflow. When using Firm Central, this begins with the ability to create customized fields for contacts and matters.

To create customized fields, log into Firm Central. Every firm can create up to ten custom fields, each of which can be configured as for text, date, or list entries. Additionally, each custom field can be set as mandatory or optional. For example, an attorney at a personal injury firm may find it helpful to note the incident date in a separate field from the general notes section of the matter. Let's create that customized field.

In the upper right corner of your screen, hover above your name. Click on your name, and click Admin. From the Administration console, click on Customization. Verify that you have landed on the Custom Fields tab, enter the name of your new customized field . . . select the field type. Again, the values can be text, date, or list format. Choose whether or not the field should be optional or mandatory, then click Save. You've now created a custom field for matters.

Creating a customized field for contacts and clients is very similar to the steps we just followed for working with matters. From the customization section of the Administration console, simply click on Contact/Client Form. Label or name your field. Select your field type. And select whether the field applies to all contacts or just clients.

It should be noted that by customizing customer lists, firms with specific practice areas are able to limit the practice areas shown for selection when creating a matter or create additional case types within certain practice areas. For example, in the Custom Lists tab, I can create a case type for negligence under the practice are of product liability.

By definition, as your practice management solution, Firm Central stores information for many different types of contacts. Through customization, you will be able to specify if a person or entity is a general contact, client, business contact, or a business client. Once you have done so, you can further customize their role. Click on Roles . . . for example, is this general contact a prospective client?

Thanks for taking the time to learn about customization in Firm Central.