

Firm Central – Transcript

How to Upload Documents in Firm Central

Hi, my name is Samantha, and today I'd like to show you some features from Firm Central, the cloud-based practice management and document storage solution from Thomson Reuters.

Let's take a look at how to upload documents to Firm Central. To upload documents via the Firm Central website, just click on a matter you want to upload documents to, and click the Documents tab. If you'd like, you can click further into one of the matters subfolders, or create a new subfolder, using the Add Folder button.

Next, to upload documents to the folder, click the Upload Document button, and click Add Files. Browse out on your computer and select files to add to your upload queue. You can hold down your Control key to select multiple documents, or hold down your Shift key to select an entire column of documents at once.

As you populate your list of documents to upload, you can choose to rename those documents or add some additional description of what the document contains.

Finally, hit the upload to begin the upload process.

If you are working on a computer that uses Windows, you can also install the Firm Central Desktop Integration, which integrates Firm Central folders into your computers existing foldering system. You can use the Desktop Integration to access your matter files and folders via Windows Explorer.

You can also upload the documents simply by dragging and dropping them into the relevant Firm Central folder.

Thanks for taking the time to learn about uploading documents to Firm Central.