

Firm Central – Transcript

Using the Firm Central Calendar

Hi, my name is Lance, 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 use the Firm Central calendar. The Firm Central calendar can operate in two ways; it can be integrated with an Outlook calendar, or it can operate on its own as a web-based calendar. And the firm administrator can determine which option your firm will use by going to the Admin tab and clicking Settings and Storage. Then click Calendar. If you're working on a computer that has Windows and Outlook, you can install the Firm Central desktop integration software, which connects your Outlook calendar to your Firm Central calendar.

When you create a new Outlook appointment, you will see drop down menus allowing you to select the Firm Central clients and matter the appointment is associated with.

Once you create the Outlook appointment, that appointment will also automatically be added to the calendar for that matter in Firm Central.

You can see the appointments for a single matter by clicking into the matter and clicking the calendar tab, or you can access a global firm calendar that shows appointments from all matters, by clicking the calendar tab at the top of the screen.

If you're not on a Windows computer with Outlook, or if you simply prefer to use a web-based calendar system, the Firm Central calendar can also be used on its own. When you enable the stand-alone web-based calendar via the Admin tab, you will then see the new matter event button at the top of the calendar. When adding an event, you can include a location and notes, or make it recurring.

Individual matter calendars will show an agenda pane on the left-hand side, showing all upcoming appointments for that matter, whereas, the left-hand pane on the global calendar allows you to further filter the calendar so you can view all the appointments for a particular attorney, or a particular client.

Both calendars feature both weekly and monthly calendar view, as well as an option to quickly jump to today.

Thank you for taking the time to learn about using the Firm Central calendar.