

FIRM CENTRAL[®]

CREATING A MATTER IN FIRM CENTRAL – GENERAL USER AND ADMINISTRATOR

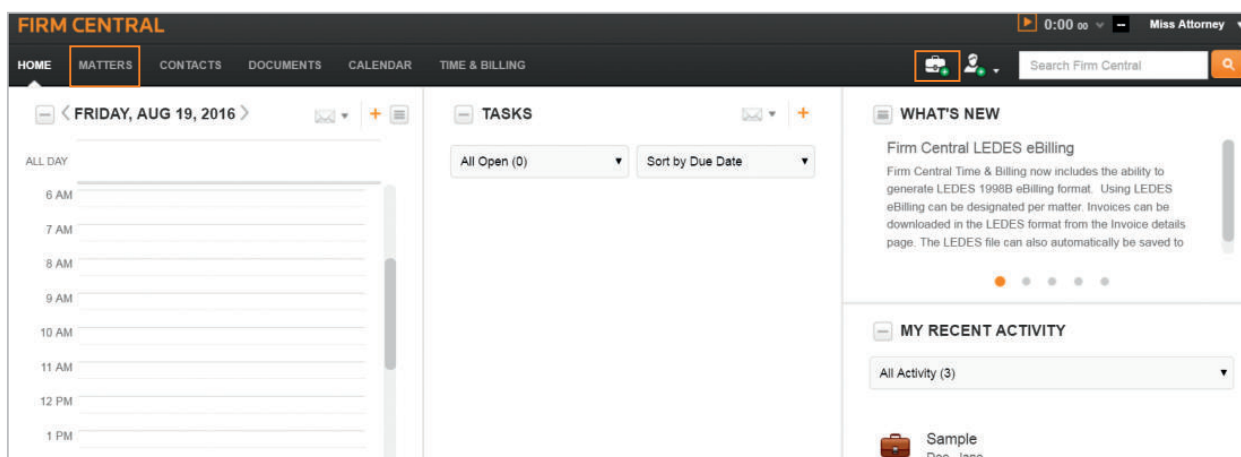
QUICK START GUIDE

STEP 1

Go to firmcentral.westlaw.com and sign in with your usual OnePass.

STEP 2

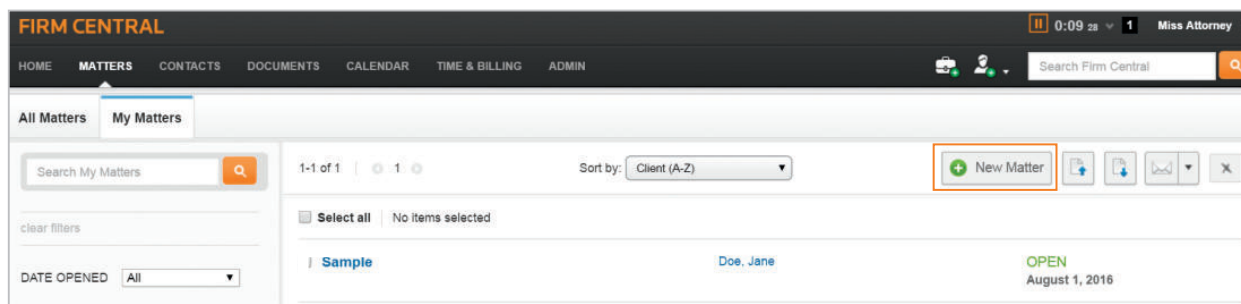
From the Firm Central homepage, use the **Matters** link appearing at the top of the page. To bypass the main Matters page, which shows all matters associated with your account as well as specific matters created by you, click on the **Briefcase** icon in the upper right-hand corner of the homepage to go directly to the matter creation page.



NOTE: When creating matters, you'll be required to associate the matter with a Client. Create clients via the icon directly to the right of the briefcase icon on the homepage.

STEP 3

On the Matters page, click the **New Matter** link. Note that you may toggle between All Matters associated with your account and My Matters, matters created by you.



STEP 4

Fill in the fields on the New Matter page with as much information as possible. Matter Name and Client fields are required. If typing in a client name you have already created, you will be able to select that client. You may also create a new client for this specific matter.

FIRM CENTRAL

HOME MATTERS CONTACTS DOCUMENTS CALENDAR TIME & BILLING ADMIN

New Matter [Expand All](#)

Matter Name * Client *

Date Opened *

Alternate ID

Will replace the system generated matter ID.

+ Matter Description

+ Billing Information

+ Court Information

+ Custom Fields

Save Cancel

STEP 5

Choose the practice area and case type that best describes the matter in Matter Description. You may also add case notes/opposing party info/memo.

New Matter [Expand All](#)

Practice Area Case Type

Case Description

233 characters remaining

Opposing Party

Name Pro Se

+ Add Contact Information

+ Add Another Opposing Party

Memo

Save Cancel

STEP 6

If applicable, options for including Billing Information and Court Information are available.

STEP 7

Matter Team allows you to set up team member access for the matter. Various permissions options are available.

Matter Team

Colleague	Roles	Matter Team	Matter Rate
Abby Lieberman	Owner	<input type="checkbox"/>	
Alison Camille DeRudder Thorpe	Editor	<input type="checkbox"/>	
Andrew Roth	Denied Access	<input type="checkbox"/>	\$0.00
Aniket Natu	Denied Access	<input type="checkbox"/>	
Ann Williamson	Denied Access	<input type="checkbox"/>	
Anne Kaminsen	Owner	<input type="checkbox"/>	\$0.00

Save Cancel

STEP 8

Save and you have completed the steps for creating a new matter within Firm Central.

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