

# FIRM CENTRAL®

## CUSTOMIZATION OF MATTERS IN FIRM CENTRAL – ADMINISTRATORS

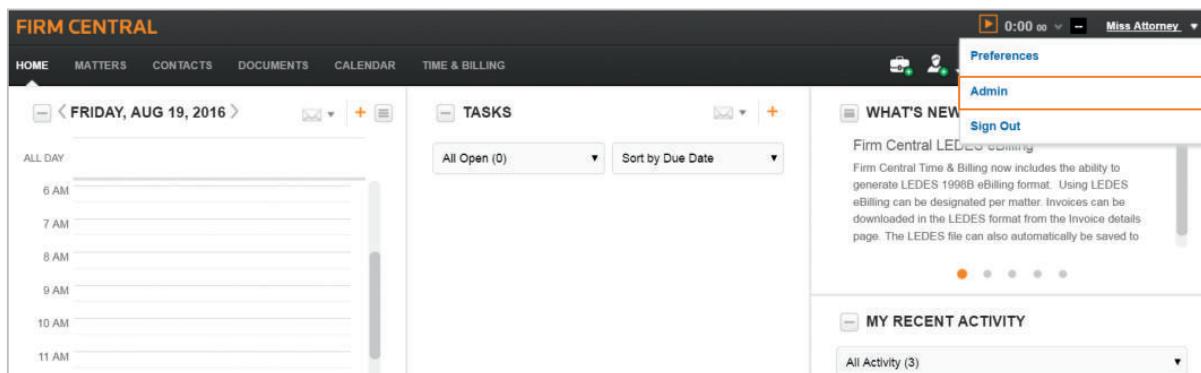
### QUICK START GUIDE

#### STEP 1

Access Firm Central with OnePass via [firmcentral.westlaw.com](http://firmcentral.westlaw.com).

#### STEP 2

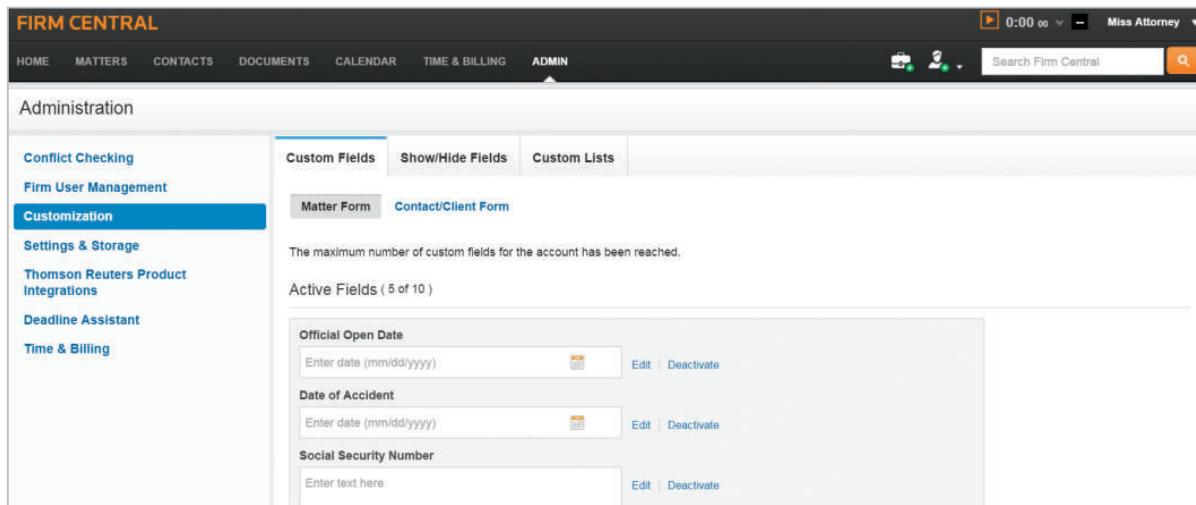
From the Firm Central homepage, switch to Admin access by pulling down the menu under your name in the upper right-hand corner of the page. Then use the **Admin** link that appears next to Time & Billing.



The screenshot shows the Firm Central homepage with a dark header bar. The header includes links for HOME, MATTERS, CONTACTS, DOCUMENTS, CALENDAR, and TIME & BILLING. On the far right of the header, there is a user profile icon and a dropdown menu labeled 'Miss Attorney'. The dropdown menu has options for Preferences, Admin (which is highlighted with an orange border), and Sign Out. The main content area displays a calendar for 'FRIDAY, AUG 19, 2016', a 'TASKS' list, and a 'WHAT'S NEW' section. The 'WHAT'S NEW' section contains a message about LEDES eBilling.

#### STEP 3

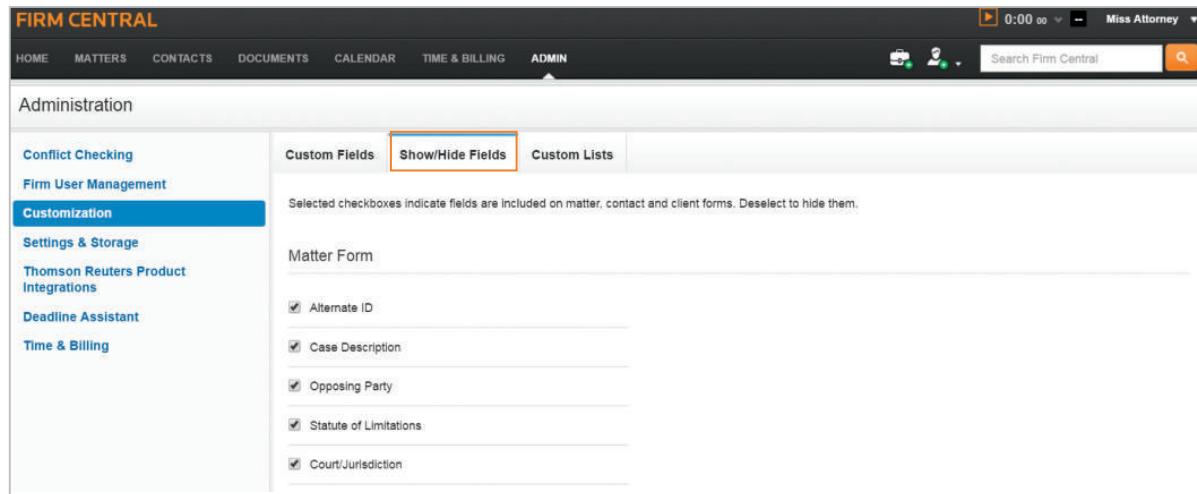
Customization options allow the administrator to alter the pre-existing Matter Forms within Firm Central to best accommodate the needs of the office (see above).



The screenshot shows the Firm Central Administration page. The header includes links for HOME, MATTERS, CONTACTS, DOCUMENTS, CALENDAR, TIME & BILLING, and ADMIN. The ADMIN link is highlighted with an orange border. The main content area is titled 'Administration' and contains a sidebar with links for Conflict Checking, Firm User Management, **Customization** (which is highlighted with a blue background), Settings & Storage, Thomson Reuters Product Integrations, Deadline Assistant, and Time & Billing. The 'Customization' section has tabs for Custom Fields, Show/Hide Fields, Custom Lists, Matter Form (which is highlighted with a blue background), and Contact/Client Form. The 'Matter Form' tab is active, showing a message about reaching the maximum number of custom fields. Below this, there is a section for 'Active Fields (5 of 10)' with fields for 'Official Open Date', 'Date of Accident', and 'Social Security Number', each with an 'Edit' and 'Deactivate' link.

**STEP 4**

The Show/Hide Fields tab allows the administrator to strip out certain fields, such as Alternate ID or Statute of Limitations, that may not be relevant to the type of matters handled in the firm.

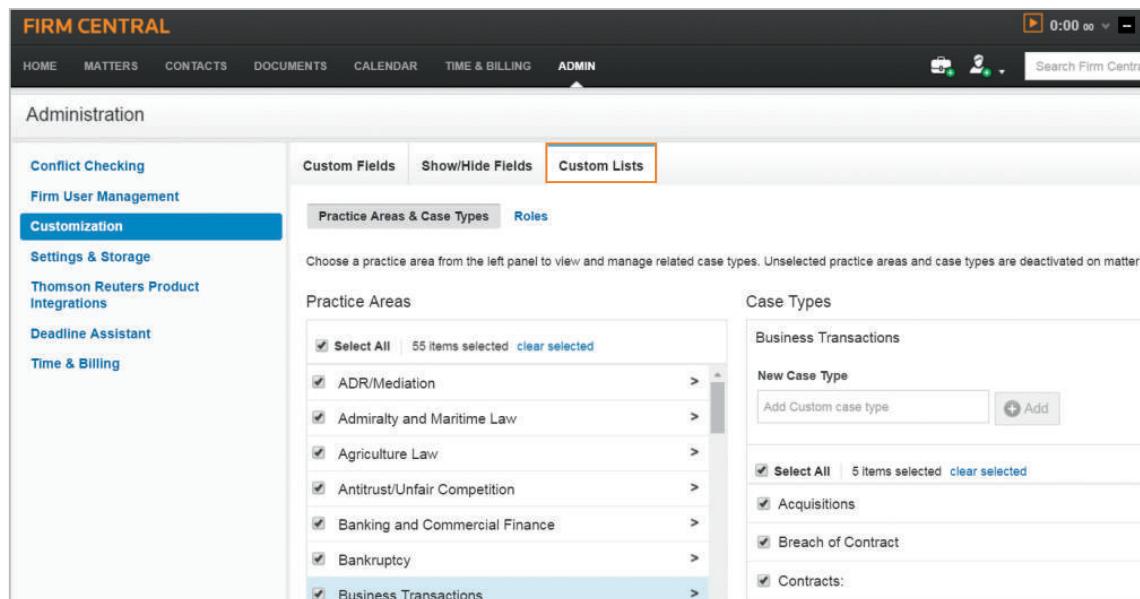


The screenshot shows the Firm Central interface with the 'ADMIN' tab selected. In the 'Administration' section, the 'Custom Fields' tab is active, and the 'Show/Hide Fields' sub-tab is highlighted with a red box. A note below the tabs states: 'Selected checkboxes indicate fields are included on matter, contact and client forms. Deselect to hide them.' The 'Matter Form' section contains five checkboxes, all of which are checked:

- Alternate ID
- Case Description
- Opposing Party
- Statute of Limitations
- Court/Jurisdiction

**STEP 5**

The Custom Lists tab allows the administrator to specify particular Practice Areas and Case Types handled by the firm, streamlining the process of creating a matter.



The screenshot shows the Firm Central interface with the 'ADMIN' tab selected. In the 'Administration' section, the 'Custom Lists' tab is active, and the 'Practice Areas & Case Types' sub-tab is highlighted with a red box. The 'Practice Areas' section on the left lists several categories, with 'Business Transactions' selected (indicated by a blue background). The 'Case Types' section on the right shows a list of case types, with 'Business Transactions' also selected. A 'New Case Type' input field is present, and an 'Add' button is visible.

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