

# PracticeMaster Contacts Quick Guide



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# Quick Guide to PracticeMaster Contacts

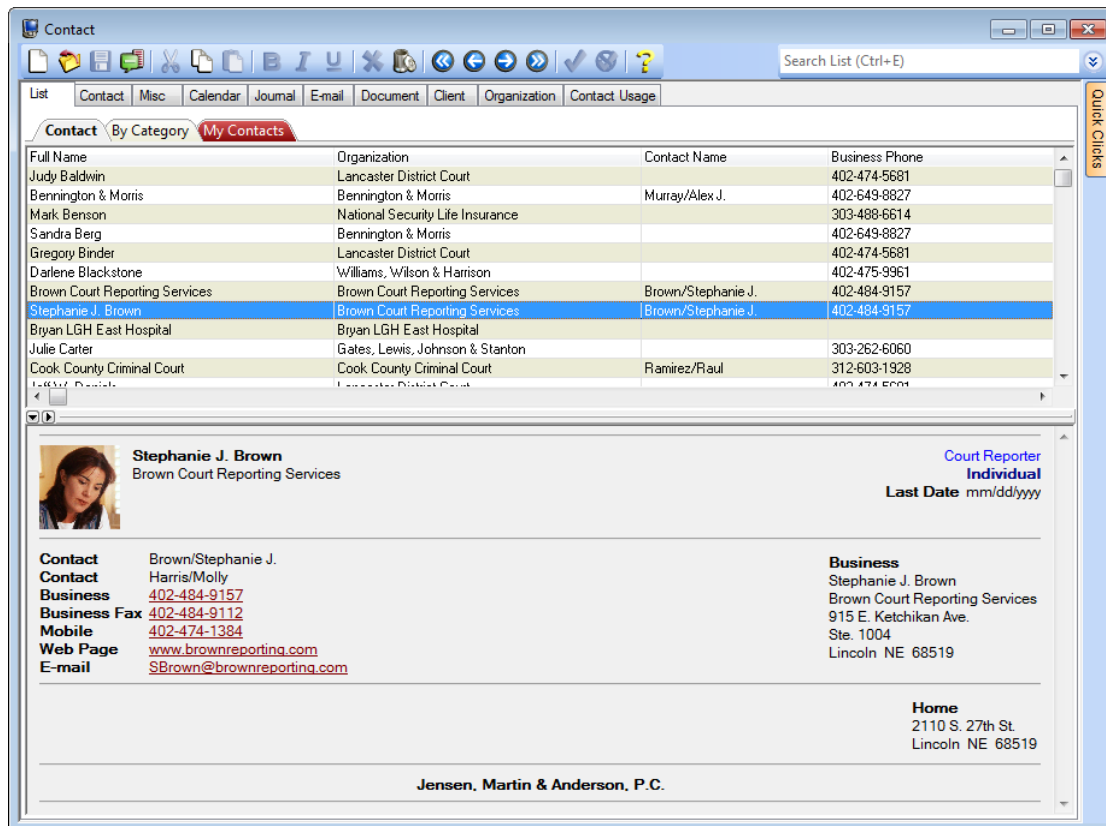
This Quick Guide will show you how easy it is to use PracticeMaster Contacts.

## WHAT IS A CONTACT?

Contacts are the people, businesses, and anyone else with whom you might share a professional relationship, including clients. The PracticeMaster Contact file is shared with Tabs3 Billing and Trust Accounting Software to provide a central, organized location for all of your contacts.

## GETTING STARTED

Let's take a look at the Contact file. From the **File** menu, select **Open**, and then select **Contact**. The Contact window can also be opened from other areas of the software by clicking the  icon, which can be found on the Task Folders, the PracticeMaster Task Bar, and in the Matter Manager window.





The Contact file displays all of your contacts on the **List** tab, with each row representing a separate contact within the file. Highlighting a contact in the list and then selecting the other tabs in the window will display additional information about that contact.

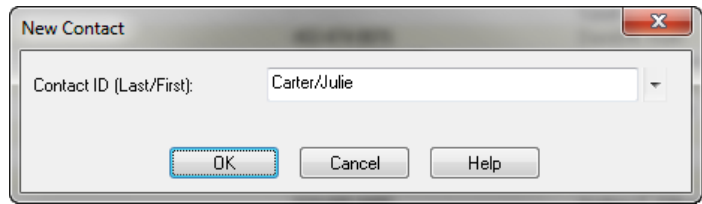
Two types of contacts can be maintained, along with an unlimited number of contact categories. An Individual contact represents a single person, such as a client, an opposing attorney, a court reporter, a judge, etc. These individuals can be associated with organization contacts via the **Organization** field. An Organization contact is a contact that represents a business or a group entity. An organization contact can have multiple individual contacts associated with it. When an organization's business fields are updated,

you can specify which associated individual contacts will also be updated, making working with business-related contacts easier than ever!

### ADDING A CONTACT

Adding a contact is done in three easy steps:

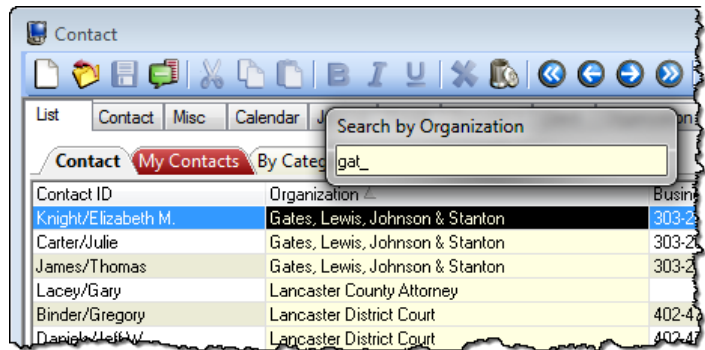
1. In the Contact file, click the  button to add a new contact. This will display a New Contact window.
2. After entering a name in the **Contact ID** field, click **OK**.
3. Enter any pertinent information about the contact, and click the  button to save your entry.



Congratulations, you have just added a new contact to PracticeMaster!

### FINDING A CONTACT

PracticeMaster provides an easy way to find any contact. From the **List** tab of the Contact file, start typing the contact's last name. An incremental search window will be displayed and the list will advance to the first record with the letters entered, allowing you to easily find the desired contact. Or, click the header of any column to sort by that column. Then, begin typing. An Incremental Search window will be displayed, which searches the selected column

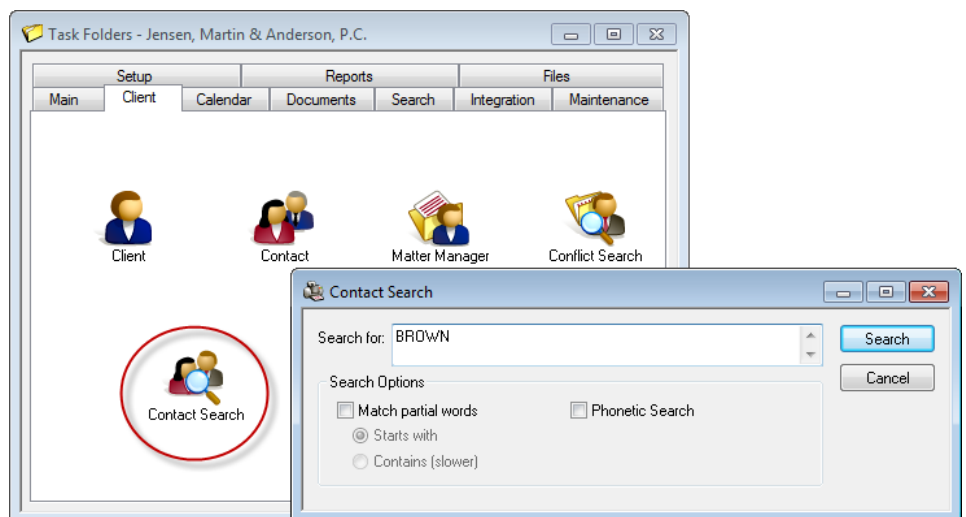


for the first record that matches the characters entered. For example, if you want to see all contacts associated with a certain organization, select the **Organization** column header. The incremental search window will be titled "Search by Organization" and the **Organization** column will be searched for the first match to the characters entered, as shown in the figure above.

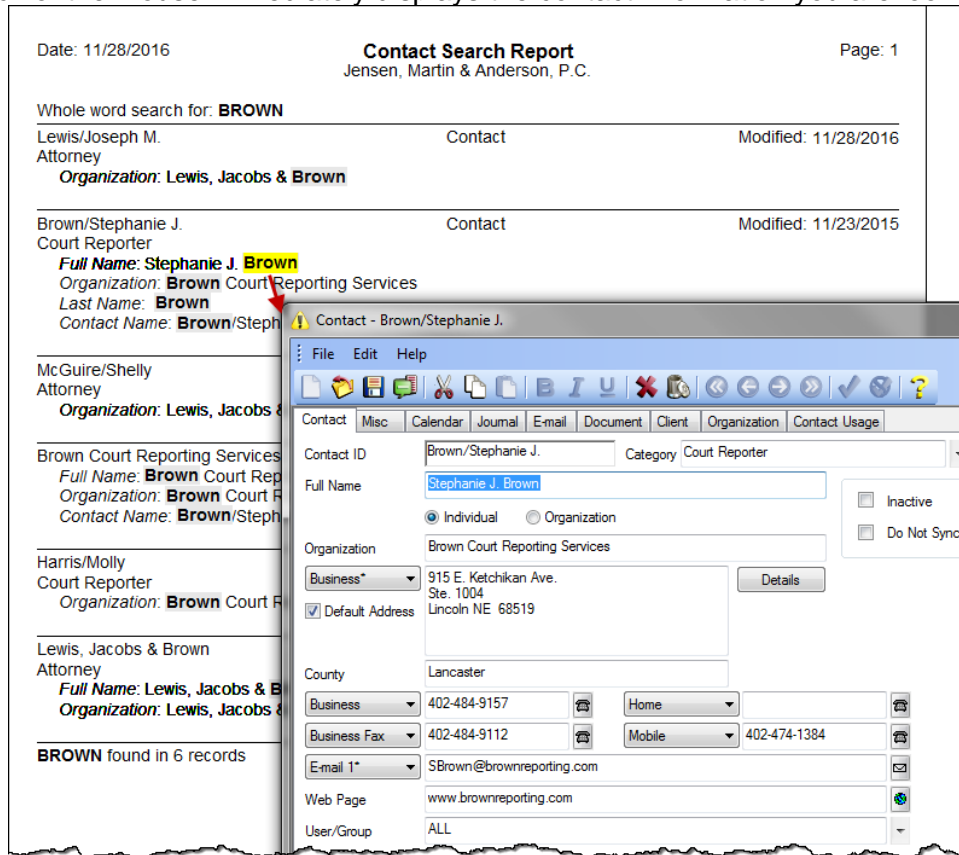
You can also use the Search Box to search all columns for the desired text. The Search Box is discussed in detail in the PracticeMaster Search Guide.

Another way to search the Contact file includes the powerful Contact Search program, which makes finding a contact simple and quick.

1. On the **Client** tab of the Task Folders, click the **Contact Search** icon.
2. In the **Search for** field of the Contact Search window, enter the name of the contact you want to find.
3. Click the **Search** button. A Print dialog box will be displayed allowing you to print, save, or preview the Contact Search Report. This report contains a detailed list of your search results.



4. Click the **Preview** button. This will display the Contact Search Report on your screen, showing you any records that matched your search criteria.
5. Move your mouse over one of the records. When the record is highlighted in yellow, you can drill down to it. This is shown in the figure on the following page.
6. A single click of the mouse immediately displays the contact information you are looking for!



As you can see, the Contact Search program makes it easy to find any contact.

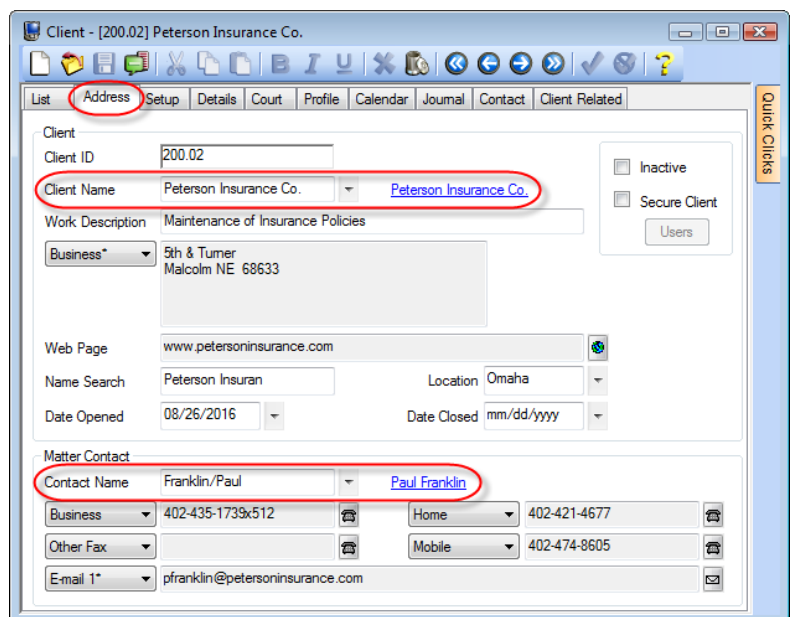
**Note:** PracticeMaster even lets you customize the Contact Search Report to include any field you want. Customization of this report is performed in the **File Maintenance** program.

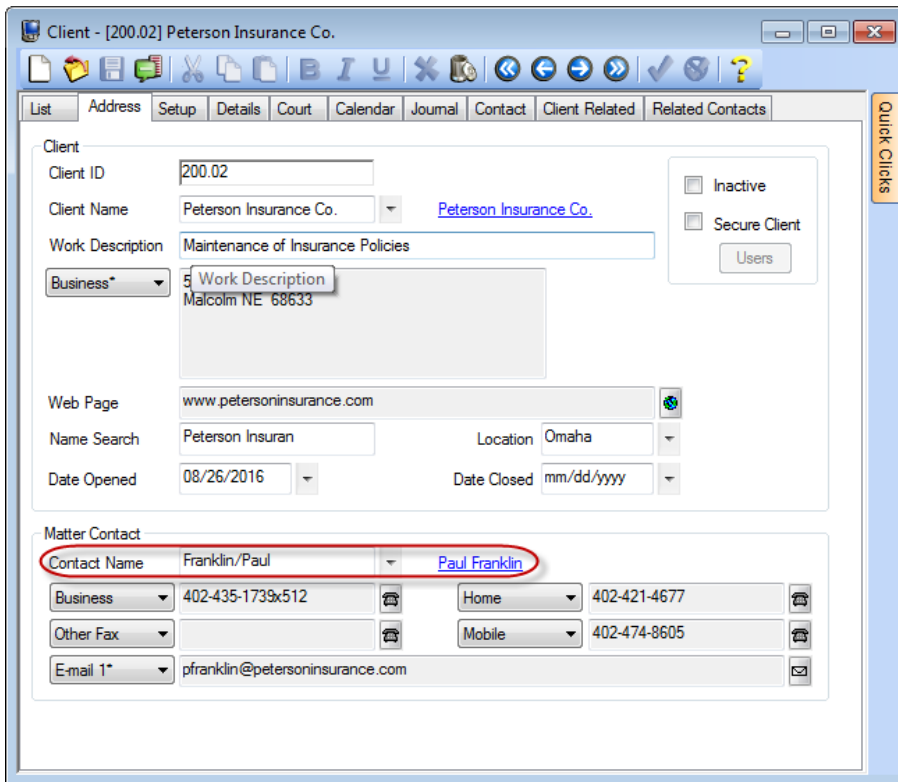
## CLIENTS AND CONTACTS




All contact information for clients is stored in the Contact file. This allows you to update all matters for a client by updating a single contact record. Additionally, you can link or associate contacts with your clients in many other unique ways. This provides one of the major benefits of PracticeMaster – you can track the history of each contact and their involvement with any client.

For this example, we will show you how to add a contact as an organization client's contact name.

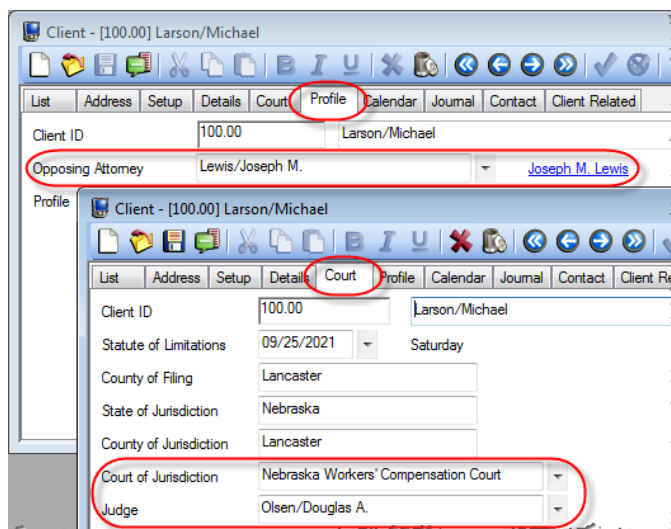
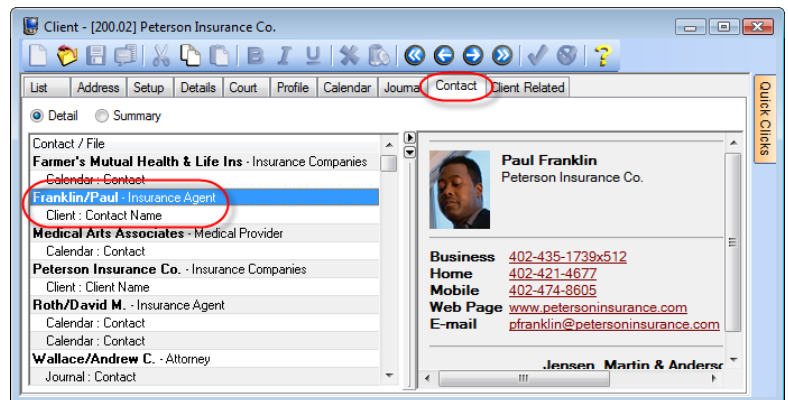
Selecting an individual as the primary contact for a client is done in just a few short steps:





1. On the **Client** tab of the Task Folders, click the  icon to open the Client file.
2. After choosing a client, click the **Address** tab.
3. Click the  button next to the **Contact Name** field to open the Contact Lookup window.
4. Double-click a contact in the list. This will return you to the Client file with the **Contact Name** field now filled in, as shown in the figure to the left.
5. Click the  button to save your changes.

If you click the **Contact** tab in the Client file, you will notice the contact is listed here as the Contact Name for this client. All contacts associated with a client are listed on the **Contact** tab, as shown in the figure to the right.




As previously mentioned, contacts can be linked to clients in other ways. In the figure on the left, a contact is linked as an opposing attorney on the **Profile** tab, while another contact is linked as a judge on the **Court** tab. This ability to link clients and contacts is a major benefit of PracticeMaster. Keep in mind that there are other areas in which a contact can be associated with a client using the same basic steps. Linking a contact to a client can be done via multiple fields the Client file or the **Create Client** action in the Contact file.

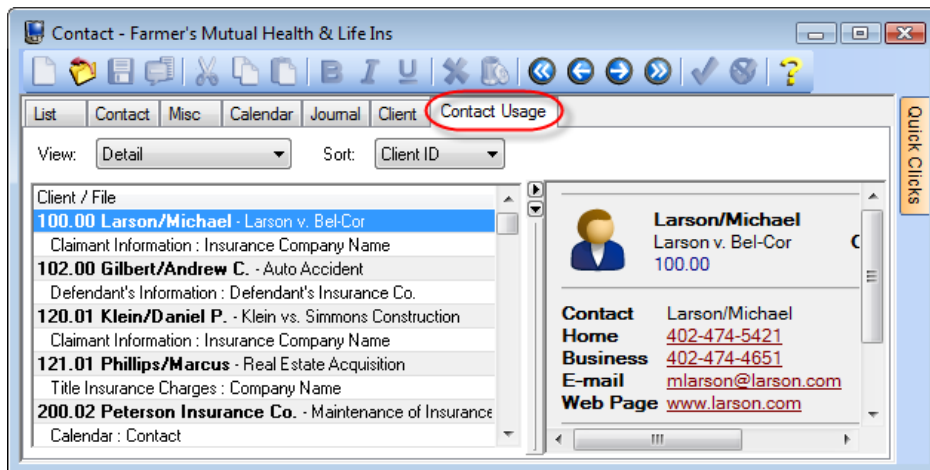
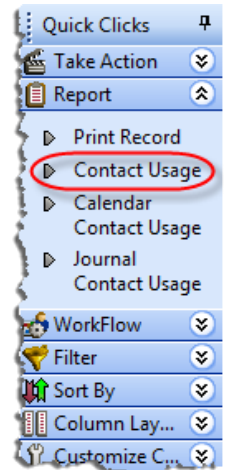
## CONTACT USAGE

Now that you've linked contacts and clients, you can use the **Contact Usage** tab in the Contact window to see exactly how that contact has been involved with your firm. Clicking this tab displays a list of records (i.e., clients, e-mails, appointments, phone conversations, etc.) in which a contact is used, as shown in the figure above. Double-clicking any of the records in the list will instantly open the file containing that specific reference.

### CONTACT USAGE REPORT

The **Contact Usage Report** provides the same information as the **Contact Usage** tab, giving you another convenient way to determine a contact's involvement with your firm.

1. In the Contact window, click the **List** tab.
2. Select a contact by clicking on their name.
3. Click the  button in the **Report** group of the **Quick Clicks** pane.
4. Select **Contact Usage** to preview the **Contact Usage Report**.



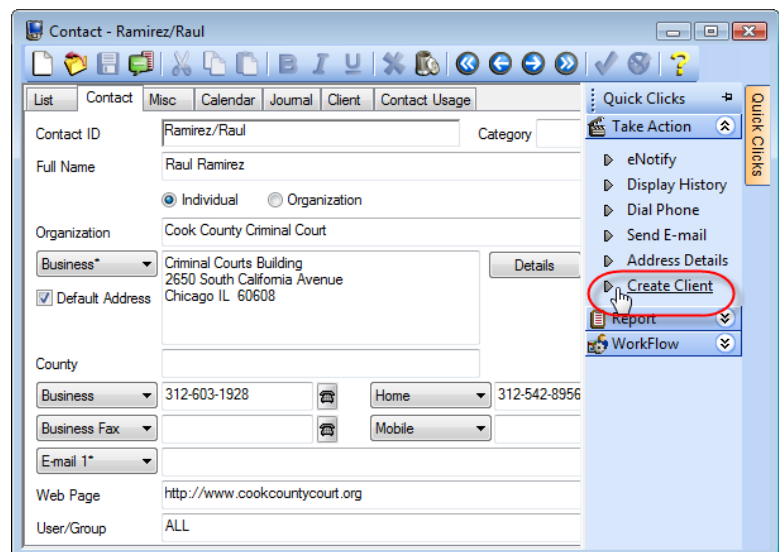
The **Contact Usage Report** lists all cross references to that contact, and also includes drill-down capabilities. Clicking a drill-down field will take you directly to the file and field containing that specific reference.

## ADDITIONAL INFORMATION


There are numerous possibilities in which PracticeMaster's contacts can benefit your firm. The following key items will give you a brief introduction to those possibilities.

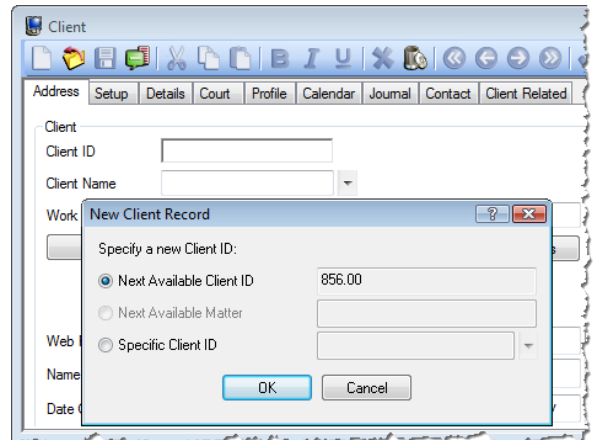
### MAKE A CONTACT A CLIENT

PracticeMaster allows streamlined processing of prospective clients. Rather than using a Client ID for a prospective client, enter prospective clients as contacts. This allows you to not only store contact information, but create a summary of the prospective client's case, schedule a follow-up meeting, and journal any phone conversations that occur after the initial



meeting. Then, when the contact later decides to become a client, simply use these steps to create a new client record.

1. In the Contact window, from the **List** tab, double-click the prospective client.
2. Select the **Contact** tab.
3. In the Quick Clicks pane, click the **Create Client** option in the **Take Action** group.
4. Select or enter the Client ID you want to use.
5. Click **OK**.
6. Click the  button to save the new client record.



Update any existing PracticeMaster records, such as calendar, journal, or document management records, to include the contact's Client ID so that all of the information previously saved under the contact is also linked to the new client record. That's it!

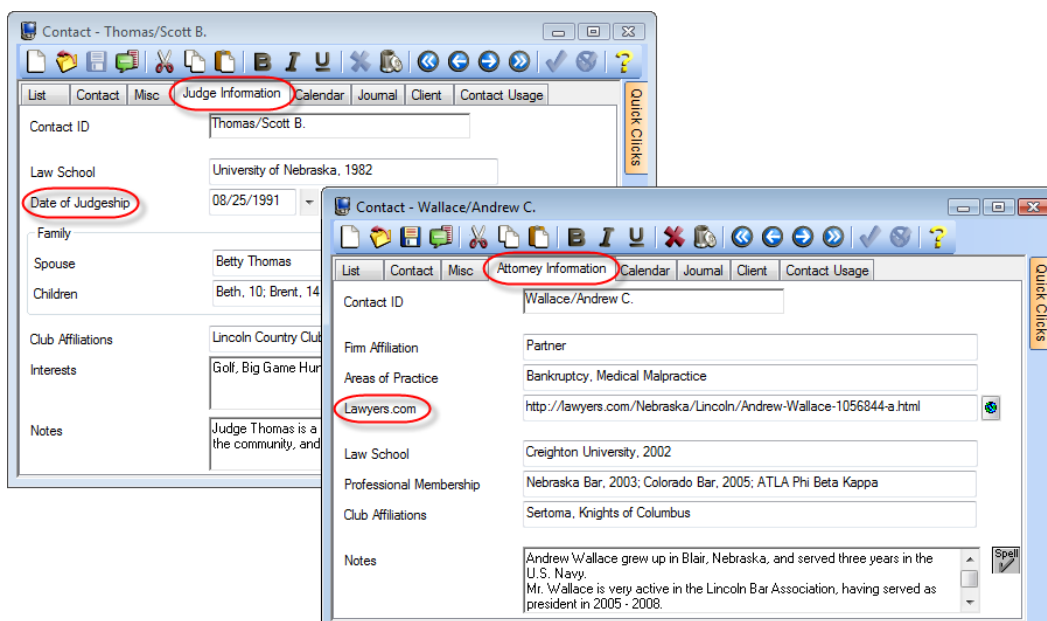
## CUSTOMIZATION

PracticeMaster has been designed to be flexible and customizable so that it can meet your specific needs. By grouping contacts into contact categories, you can take advantage of PracticeMaster's ability to store information that is specific to each category.

For example, when entering information for a judge, it makes sense that you would be prompted for information relating specifically to judges. Conversely, it would not make sense to be prompted for information related to insurance agents when entering that same judge's information. By utilizing contact categories, PracticeMaster is sophisticated enough to only prompt you for the information required. Therefore, you are presented with the exact information that you require, without being inundated with unnecessary pages and fields.

Using Contact Categories opens the way toward customizing PracticeMaster's contacts with category-specific pages, custom fields, and more!

Below are examples of category-specific pages. These pages were designed for contacts who are a part of the **Judge** Contact Category and for contacts who are a part of the **Attorney** Contact Category.





Notice the fields displayed on each page, specifically the **Date of Judgeship** field on the **Judge Information** page, and the **Lawyers.com** field on the **Attorney Information** page. These category-specific pages and their custom fields are just a sample of PracticeMaster's many unique customization capabilities.

### **OUTLOOK AND SMARTPHONE INTEGRATION**

PracticeMaster integrates with Microsoft Outlook, and therefore integrates with any smartphone or device that can integrate with Outlook, such as iPhone, Android devices, and more. This makes managing your clients and contacts even easier, and lets you take your clients and contacts with you on your mobile device. Contacts and client contacts can be seamlessly transferred from Outlook to PracticeMaster's Contact file, and any modifications made in PracticeMaster are also made to your Outlook contacts. Maintaining PracticeMaster as your central hub for contact information ensures that information is current and accurate no matter what device you are using. PracticeMaster can also integrate your calendar entries with Outlook.

### **DOCUMENT ASSEMBLY AND REPORT WRITER**

Two major components of PracticeMaster are Document Assembly and Report Writer. Document Assembly pulls information straight from PracticeMaster to generate frequently-used documents; and Report Writer lets you create custom reports based on PracticeMaster's data. These two features let you utilize all of your client and contact information to generate custom reports and documents. Be more productive by using PracticeMaster to take advantage of all that information stored in a centralized firm-wide database.

### **CONCLUSION**

Contacts are an important aspect of any firm. PracticeMaster streamlines the process of maintaining a directory of all your contacts, including clients, making it simple and straightforward. Taking advantage of PracticeMaster's contacts will allow you to be more productive, and unlock new possibilities that were previously unavailable. More information on contacts can be found in the Tabs3 and PracticeMaster Help as well as the Clients and Contacts Guide.