CLIENTS AND OTHER CONTACTS

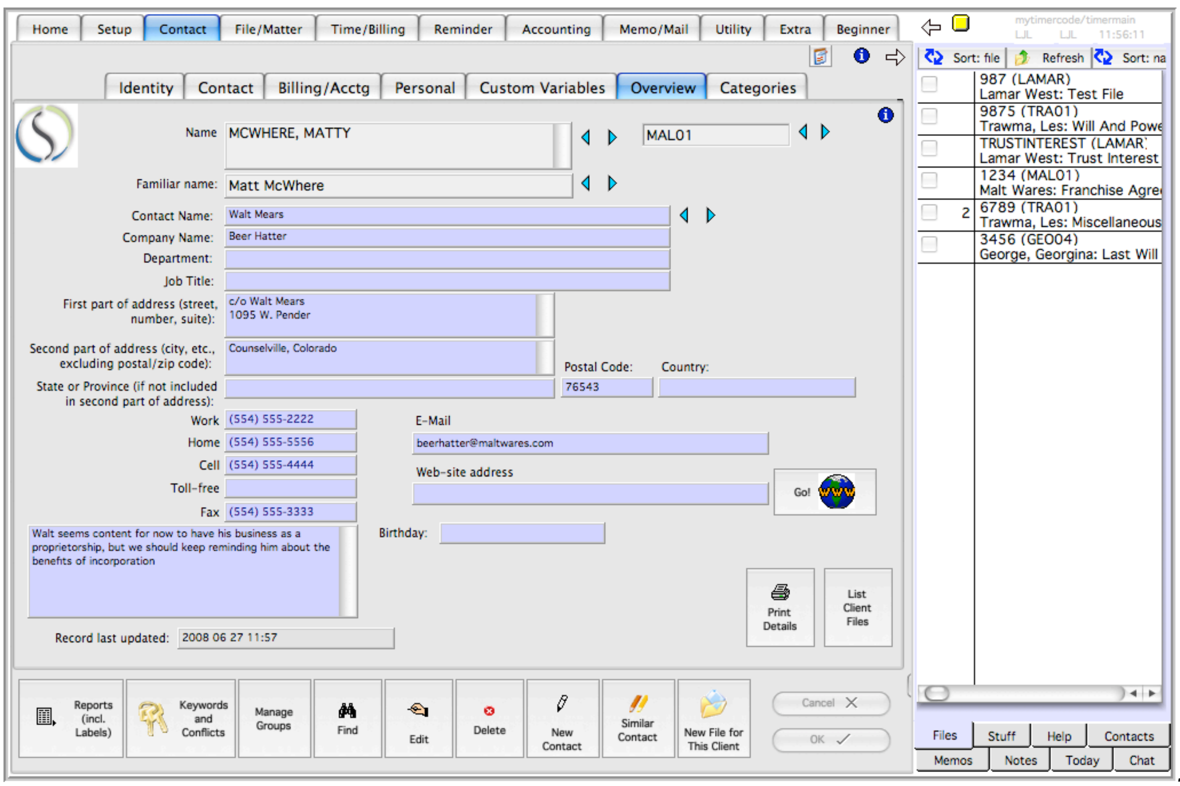
1. Overview and Main Entry Window

1.01 Overview

The contact tab is used to enter name, address and other basic data about all your contacts. A contact may be a client, a payee (supplier), an expert witness, or any other person, business, agency or office for whom you want to store contact data. Each type of contact will be entered slightly differently. Initially LawStream assumes that each new contact is a client, by setting a "client" flag in the category area of the entry window.

Each contact is entered only once. That single contact record is then "attached" to as many different file/matters as necessary (or to none at all, if the contact is not a client). For example, your client Matt McWhere might have a divorce file, a wills file, and a litigation file. Each of those files is created in the File/Matter window and each is linked to the client record for Matt McWhere. See the Clients' Files chapter for further details.

The following image shows some of the information entered in the contact entry window.



1.02 How to Start?

Start by displaying the Client/Contact entry area. That entry area appears in two forms in LawStream: a tab in the main LawStream workspace, and a separate window. The area in the Contact tab has the exact same content as the Client/Contact entry window.

The Client/Contact entry window can be opened from the Edit/Entry pushbuttons in the Contact tab, or from LawStream's Contacts/Files menu.

Keyboard Shortcut for the Contact Entry Window

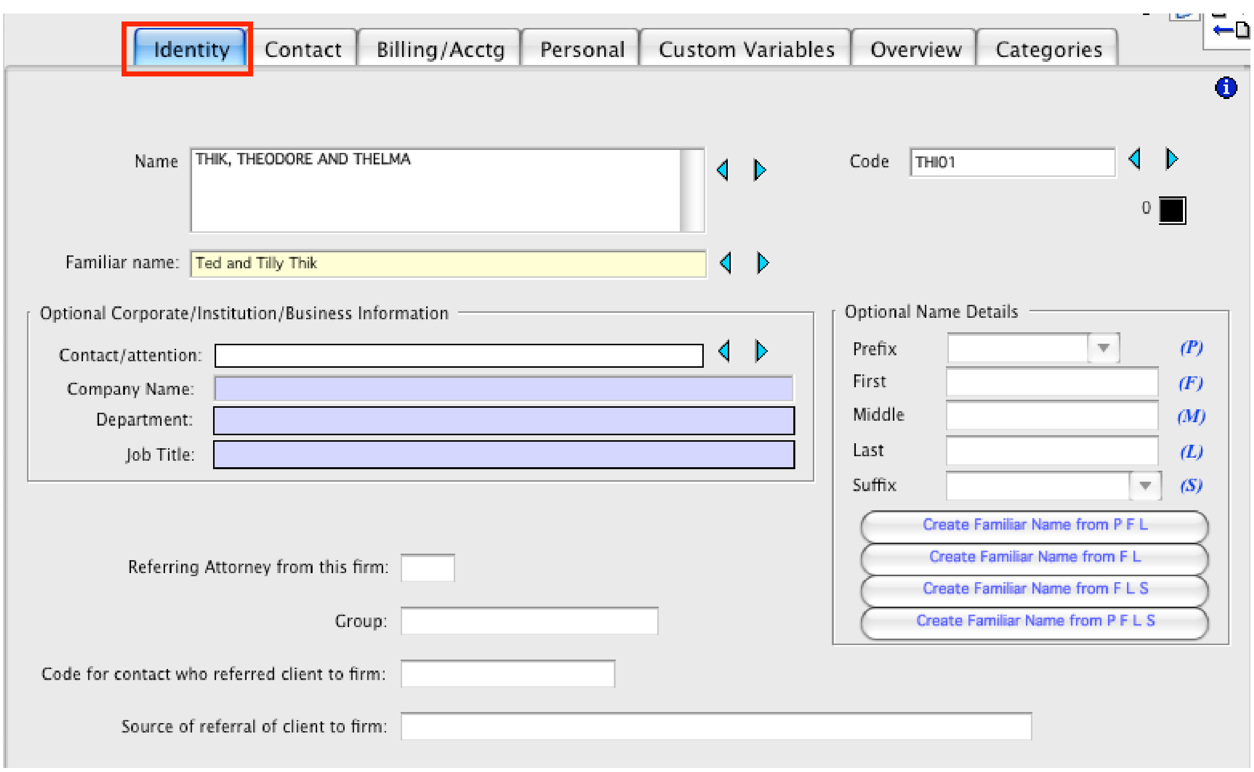
As is the case with most of the common functions in LawStream, there is a keyboard shortcut to open the Contact entry window. Mac OS X users: hold down the command (Apple) key, and press minus key. Windows users: hold down the control key, and press the minus key.

To add or edit contact information:

Click on the New Contact button at the bottom of the window to begin entering information for a new client, payee or other contact, or click on the Edit button at the bottom of the window to change information for an existing contact.

1.03 Identity Information

The Client/Contact window consists of several tabs, each containing a selection of information relating to the contact. The first of those windows is called "Identity" and contains the contact's name and a unique code (often called the "client code").



Name: This field is used for indexing contacts; as such it will default to all caps. It is very important for search purposes that the main contact name be entered as **last name first, followed by a comma and a space, then the first name** (as in the example)**.** The "familiar name" field (discussed below) is used to define the name as it should be used on bills, letters, etc..

Code: Each client/contact must have a unique code. In this example, a suggested client code of THI01 is offered. Different coding systems may be used, as long as each code is unique. You may use other alpha, numeric or alpha/numeric systems for creating client codes. Codes may be up to ten characters in length. We do recommend that you NOT use the same number/code for both the client code and the file number, due to possible confusion when reading reports.

Choosing a Client Code

LawStream has an optional feature that will suggest an appropriate client code when you enter a new client or other contact record. The code suggested will be the first three letters of the client name, followed by a number (01, 02, and so on). For example, if a client's name is entered as SMITH, DAVE, then LawStream may suggest SMI05 as the next available code for a name starting with the letters Smi.

Familiar name: This field is used to define the name as you wish it to appear on letters and billings. For example, if the primary name field is entered as MCDONALD, JANE, you may want to enter Jane McDonald as the familiar name; otherwise the name will appear as Jane Mcdonald on some reports, bills and correspondence. Establishing a familiar name is also important for corporate clients. Otherwise, ABC Corporation would appear on letters as Abc Corporation and James Brown, PLC would appear as James Brown, Plc. Adding periods between initials/abbreviations in the main "name" field also helps LawStream to interpret the letters properly.

Contact/attention Note: When entering a corporate name in the Name field you may want to use this field to enter the name of your main contact at that company. That name will appear on correspondence, unless overridden by contact information entered in the next section of this window (Contact).

Company Name/Department/Job Title**:** None of these fields is mandatory; enter as much (or as little) information as you would like to store.

Optional Name Details: If you plan to export your contact data to another device, these fields will help that device with the import process. Double check to make sure that the information LawStream auto-filled into these fields during the new client entry process is correct, and fill in any pertinent missing information.

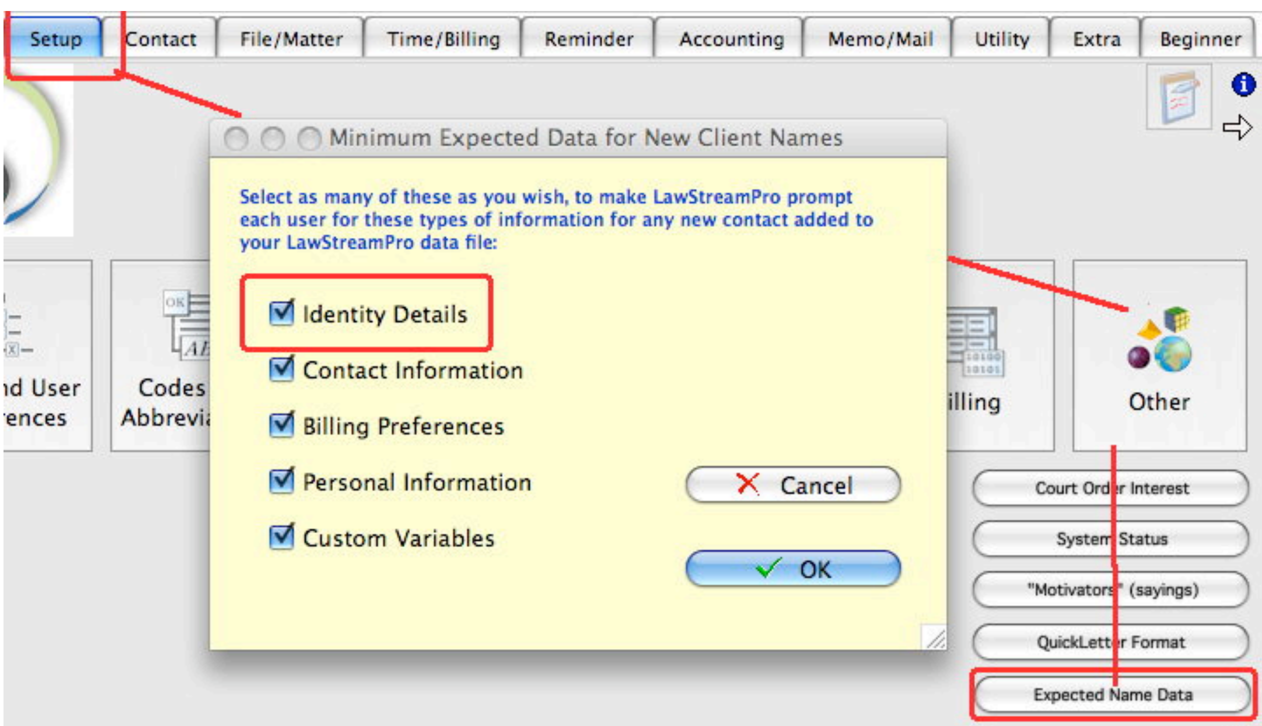
Referring Attorney: This field is for attorneys/lawyers within your own firm, and can be helpful in identifying the attorney (if any) who introduced the new client to your office. The initials must be those of a person who has a user record in your data file.

Source of referral of client to firm: This field may be used to make note of how (or by whom) this client was introduced to your office.

Group: Some law societies or bar associations require that clients be “grouped” so that the firm is aware when a large percentage of its business is coming from individuals and companies related to a single person. Whether or not you need to do that, you might find it useful to organize your clients into groups. See the section later in this chapter, on managing groups, for more information.

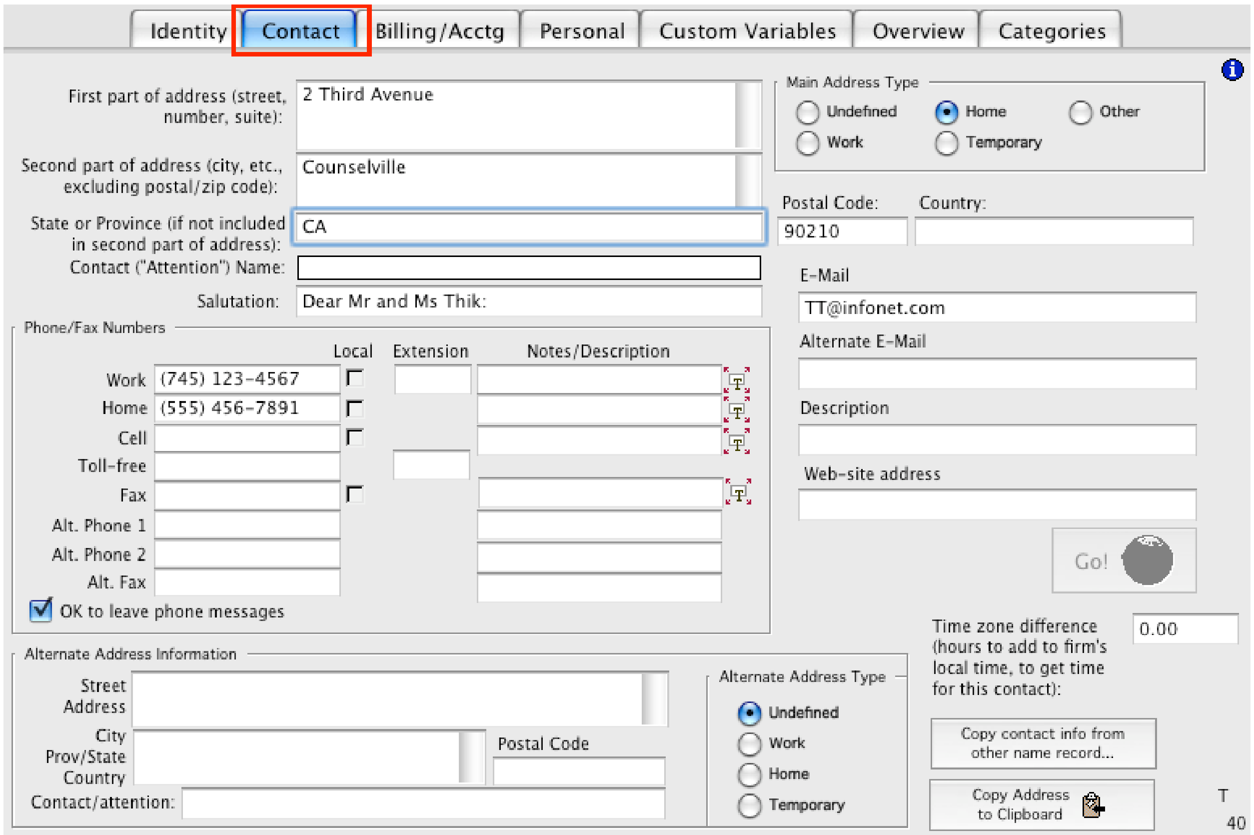
In a hurry to enter new contact?

If you want to add a new contact quickly, the only required fields are the Name and Code fields. LawStream will default the categories to “active” and “client”. To speed things up even further, go to the Setup tab and change the “Minimum expected Data for New Client Names” to “identity details” only (by un-checking all of the other options). This will allow you to click OK right on the identity tab to save the entry without having to navigate to the other tabs in the client entry window.



1.04 Contact Information

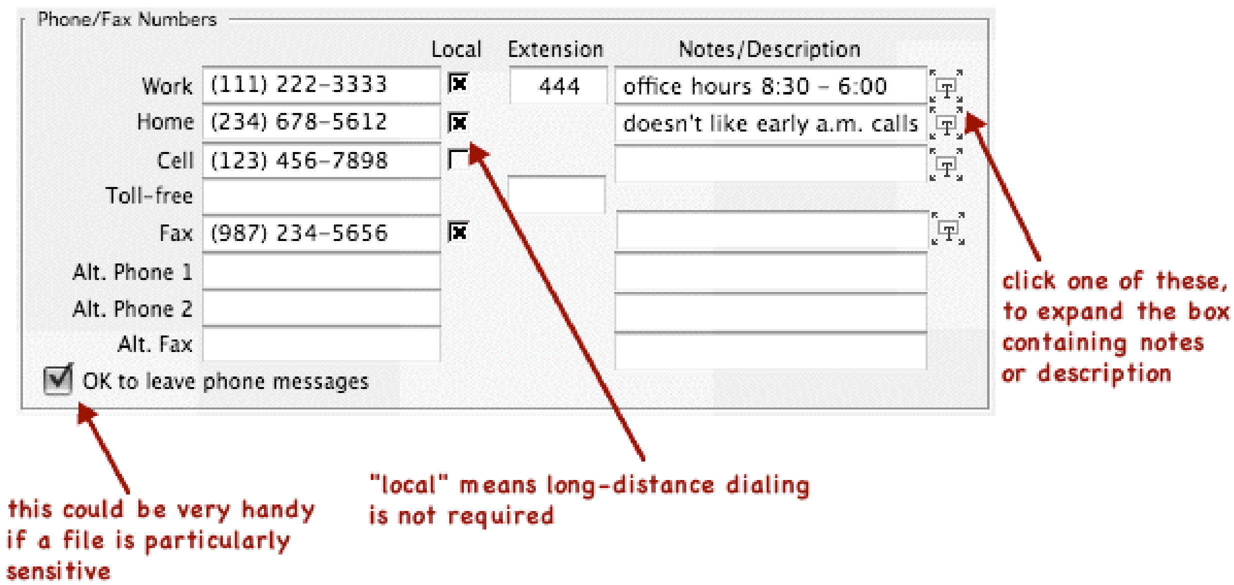
The Contact tab is used to record the client's (contact') address, phone numbers and other contact information.



Contact ("Attention") Name: If you have entered a contact ("Attention: …") name in the Identity section, this field will default to that name. If nothing appears here, you may enter information in this field.

Salutation: The salutation will be offered as a default when you create letters within LawStream. It should be something like "Dear Mr Metrick:".

Phone/Fax, etc.: Phone and fax numbers should be keyed without spaces, parentheses or other special characters, as LawStream will format them automatically. For example, 6041234567 will be converted to (604) 123-4567. Other phone-related fields may be used to supplement basic telephone and fax numbers. The following image contains examples of some of that additional information:

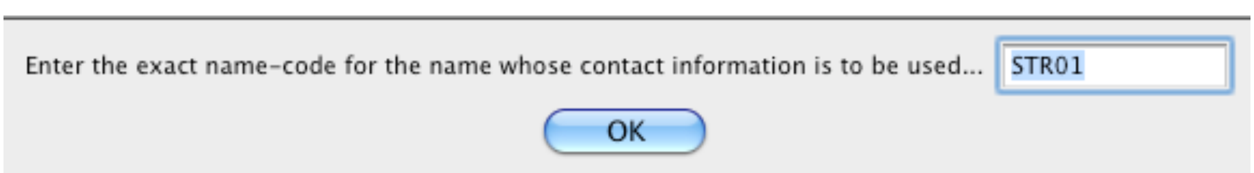


Email: An email address entered in this field may be used for email created under the Memo/Mail tab. See the Memo/Mail chapter for further details on how to take advantage of email details in LawStream.

Alternate Address: The “alternate address information” box is used mainly for information purposes, as those alternate address details are not included in letters, bills or similar reports.

Time-zone difference: The time-zone difference can be helpful when you have clients situated a long distance from your office, and when you want to confirm local time in their area before phoning.

Copy Contact Info From Other Name Record: This field may be used to copy the address, and other contact data from one client to the address fields for another client. To activate the button, you need to find the contact record for the “to” client and click on “Edit” at the bottom of the window. When the button is no longer “greyed out”, you can click on it to produce another small window (image below). Key the client code for the other client/contact record (the “from” client). Clicking OK will cause the address and other contact data for the “from” contact record to appear in the appropriate fields in the “to” contact record. Click OK to accept the change. This can be useful if you are opening new contact records for multiple members of the same family.



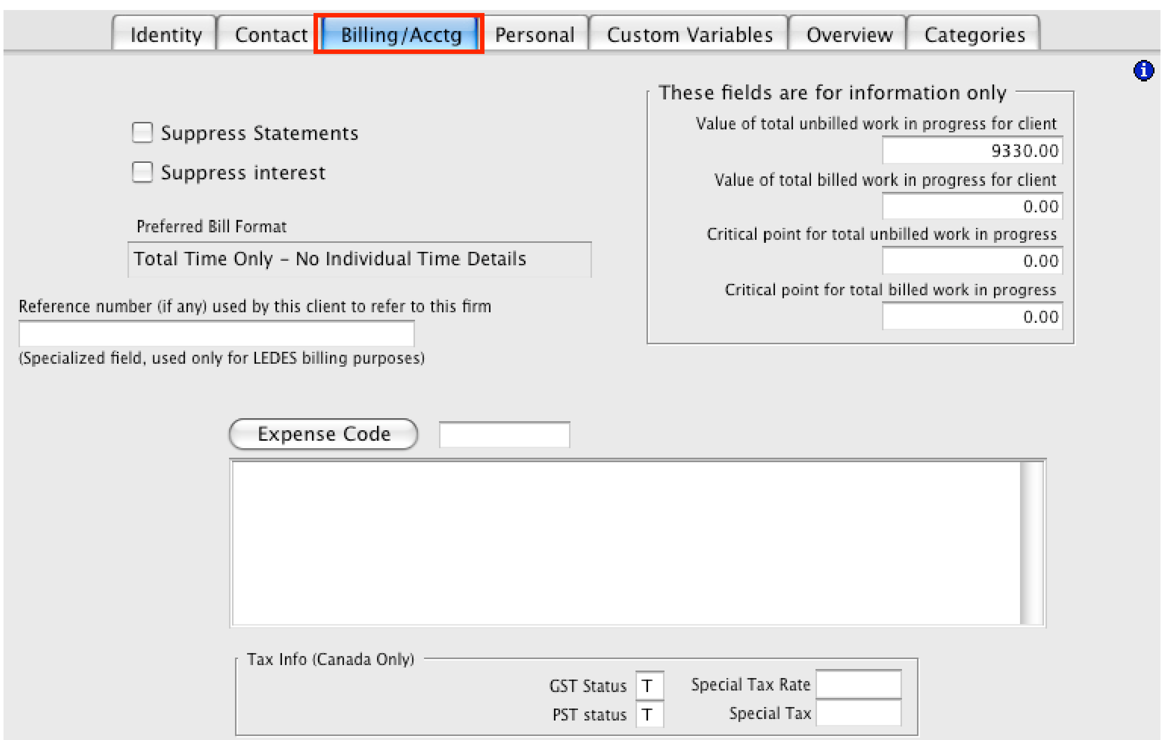
Copy Address to Clipboard: This button may be used to copy a contact's name and address data to the clipboard for use in other applications such as Microsoft Word.

Quick Web Access

If you have a web address entered in the "Web-site address" field, you can use the "Go!" button to launch your web browser and go directly to the website address you have entered for that contact.

1.05 Billing/Accounting Information

This section of the Contact entry window will let you view basic data about the client's billing status, and it will let you specify options that may override the firm's general billing preferences.



Suppress Statement: LawStream has the option to print statements that may be sent to clients who owe you money (see the Receivables chapter). Click this checkbox "on" if you do not want a statement to print for this particular client/contact (e.g. government or legal aid client). Statements show the amounts still owing on previous bills/invoices, and should not be confused with the bills/invoices themselves. The Setup/Procedures chapter contains extra information about the differences between statements and bills.

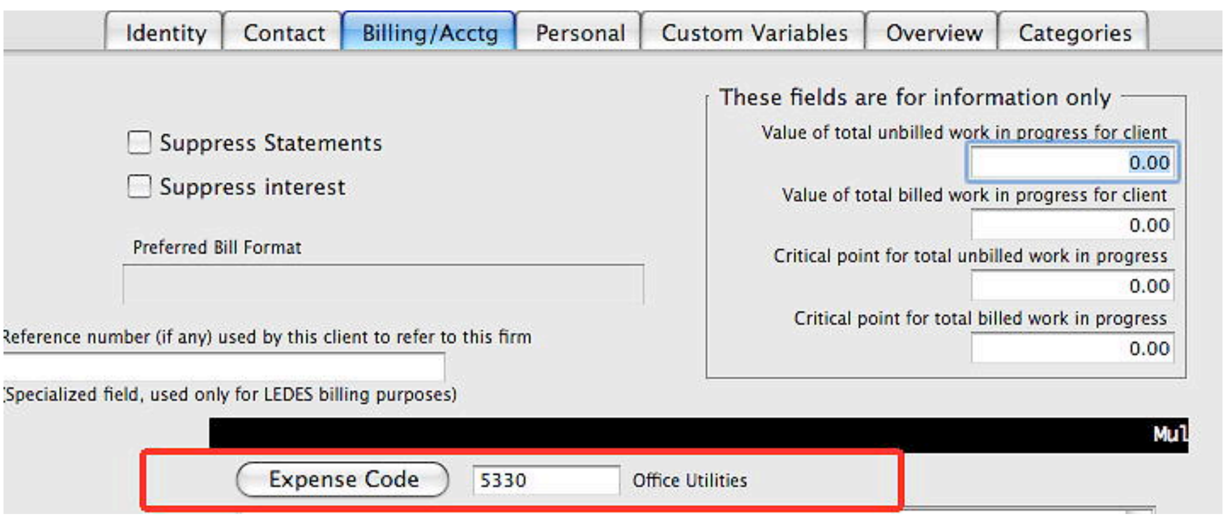
Suppress Interest: LawStream has the option to charge interest on overdue amounts owed to the firm. See the Receivables chapter and the Setup chapter for further details. Click this “on” if you wish to exclude this particular client from any interest charges.

Preferred Bill Format: This field is helpful but not essential (unless you use LawStream’s Bulk Billing feature). You may use the drop-down menu to assign a particular type of bill to this client. Even though billing normally takes place on a “file by file” basis, the format option for bills is linked to the client, and not to the file. The reason for that is that LawStream assumes that a client will usually want all bills for all files to contain the same general type of information; if that is not the case, then you can easily select a different format when you prepare a bill.

Bulk Billing

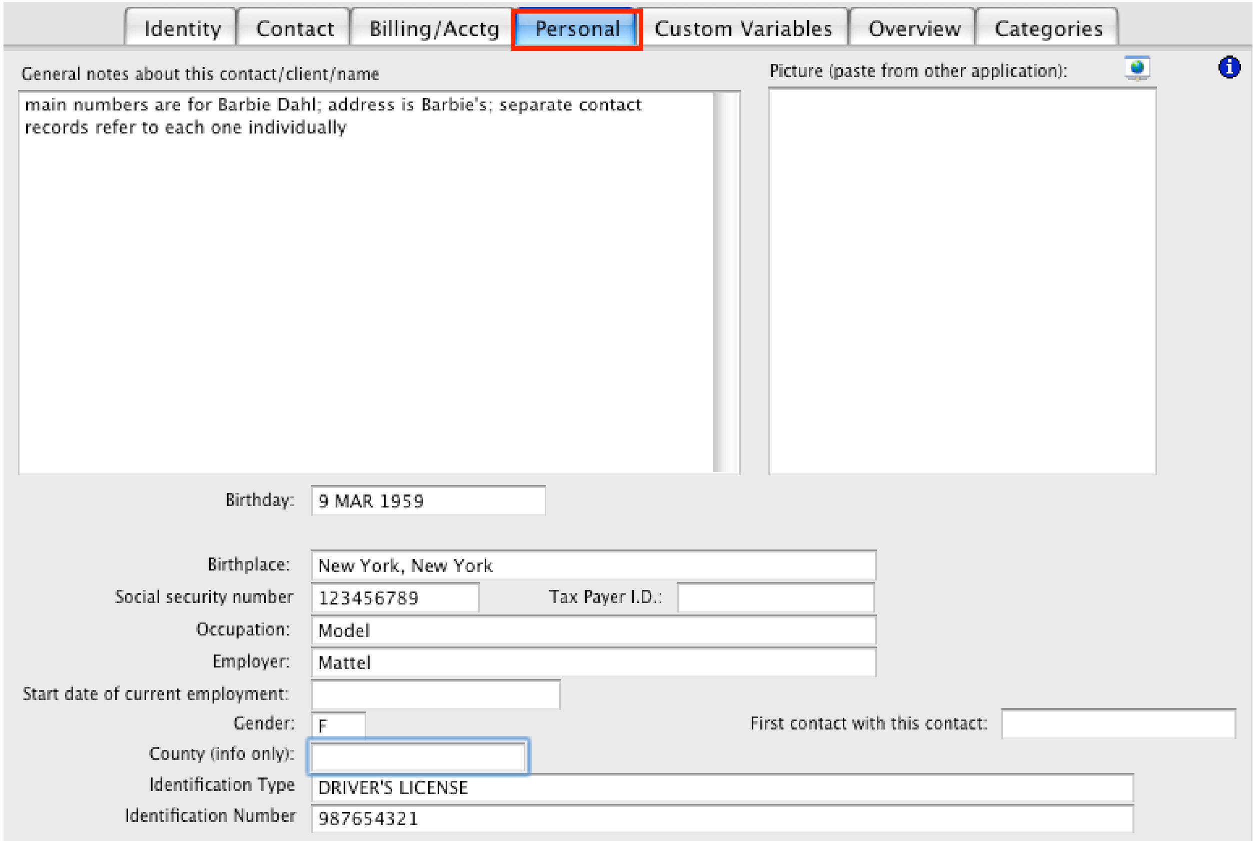
If you plan on using bulk billing, choose any bill format EXCEPT narrative text, as that format is not allowed for bulk billing.

Expense Code: This field is only used when the client/contact is a Payee (see a later section of this chapter). For example, if you are setting up your utility company as a contact, you may assign an appropriate G/L code (e.g., Office Utilities) to be associated with that contact. When you use this payee code for an office payment, that expense code will show as a default for the general ledger posting. You may change the expense code at the time of posting, or add other codes to divide the expense over two or more general ledger accounts.



Tax Info: In Canada and the UK, firms are subject to various levels of taxation on fees billed. Most clients in those jurisdictions would be taxable, but there may be exceptions. Enter a **T** if this client is subject to tax or an **X** if the client is exempt. Further information on taxation is available in the chapter devoted to Canadian requirements.

1.06 Personal Information



The information entered in this section is entirely optional, and might or might not be useful in your own practice. Some firms require personal data in addition to the usual identity and contact information. Many law societies or bar associations also require that lawyers obtain picture identification from all their clients. Some firms go further and choose to paste pictures of their clients in this window to avoid confusion between clients with similar names or even to avoid being subjected to identity fraud. Most of the fields in the above window require no explanation, and will take whatever text or other data you choose to enter into them. The following information might, though, be helpful.

General notes field: This field is used for storing general notes about a contact. One helpful use for this field, is to hold information for prospective clients, before any file is opened for them (e.g., a summary of a telephone call from someone inquiring about using your services). Another use may be to note preferred contact times, language difficulties or anything else that might be helpful to know before you contact the client.

Picture field: If you can copy an image from another application, you probably will be able to paste that image into this field. To paste an image into this picture field, you must first be in “enter data mode”, which means you must have told LawStream you want to enter or edit some contact data. After that, copy the image from another program, come back to LawStream, click on this field, and select the Paste command.

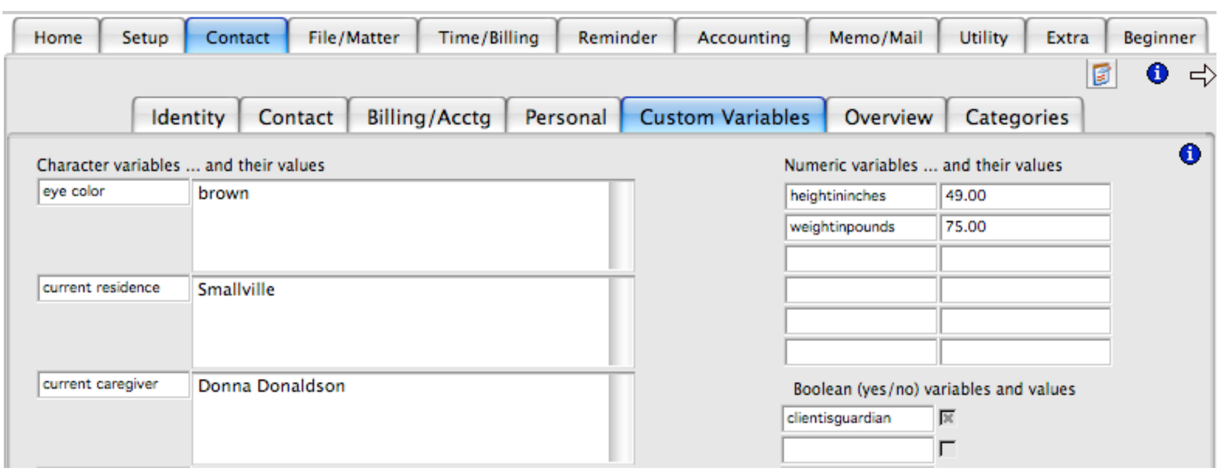
Camera icon field: If you are NOT in “enter data mode”, you can click this icon to see a larger version of the image shown on this window.

Birthday field: Key the client’s (or other contact’s) birthday here, while adding or editing contact data. You will then be able to see this contact’s name and birthday on the report of contacts and their birthdays.

“Add birthday reminder” button: If you click this, LawStream will prompt you to specify a file. You may select one of the current contact’s files, or any other file, or no file at all. In any case, LawStream will create a reminder with a date equal to the next birthday for the contact, and text referring to the fact that the date is this contact’s birthday.

1.07 Custom Variables

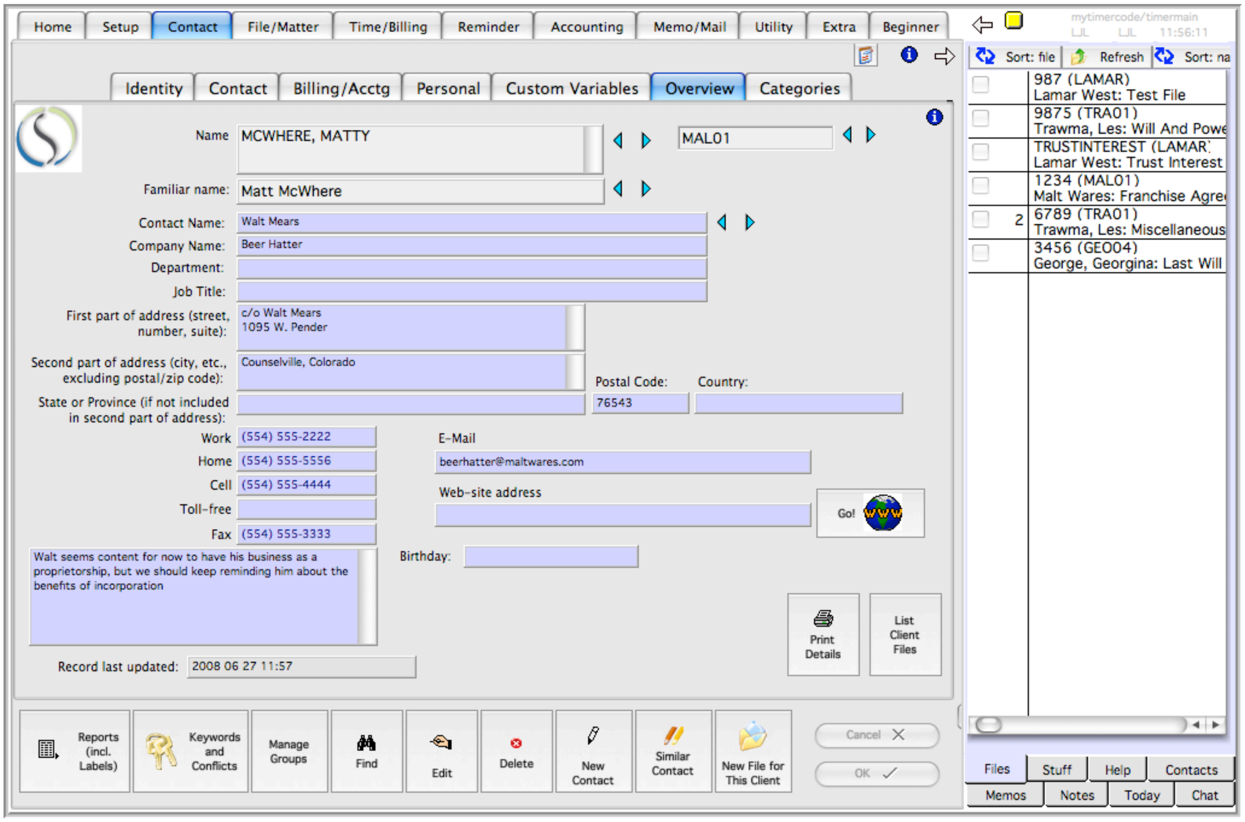
This window is used to record variables that would go beyond information already stored in LawStream and would apply generally to this client (and all of the files for this client). Remember that you also have the choice of using Global Variables that will apply to all files (see the Setup/Preferences chapter), and File Variables (see the Clients’ Files chapter) that will apply only to a specific file. Here is an example of some contact variables:



You may enter these variables at the time you add a new contact, or you may add them later. To enter variables and their values for a contact, you must first be in “Enter Data mode” (adding a new contact, or editing data for a contact already in your data base). Click on a name (“variable”) field, key the name of that field for the selected contact record, click in the value field next to that name, key a value for that variable, and then click OK when you are done. You may enter multiple variables and their values for any contact before you click OK to save your entry. Note that this part of the contact entry window is divided into different areas, to guide you in entering the correct type of variable (date, numeric, etc.).

1.08 Client Contact Overview

This window is a quick and easy way to view a summary of the most important data for a contact. You can navigate through your list of clients by using the blue triangle pushbuttons beside the various key fields for contacts (name, code, and familiar name).



Go! Button: Click this pushbutton, to make LawStream open your web browser on the page (if any) that you have specified as a link for the current contact record.

Print Details Button: Click to produce a report containing the pertinent information for a client/contact. A sample of that report is shown below.

West, Lamar

MCWHERE, MATTY

MAL01

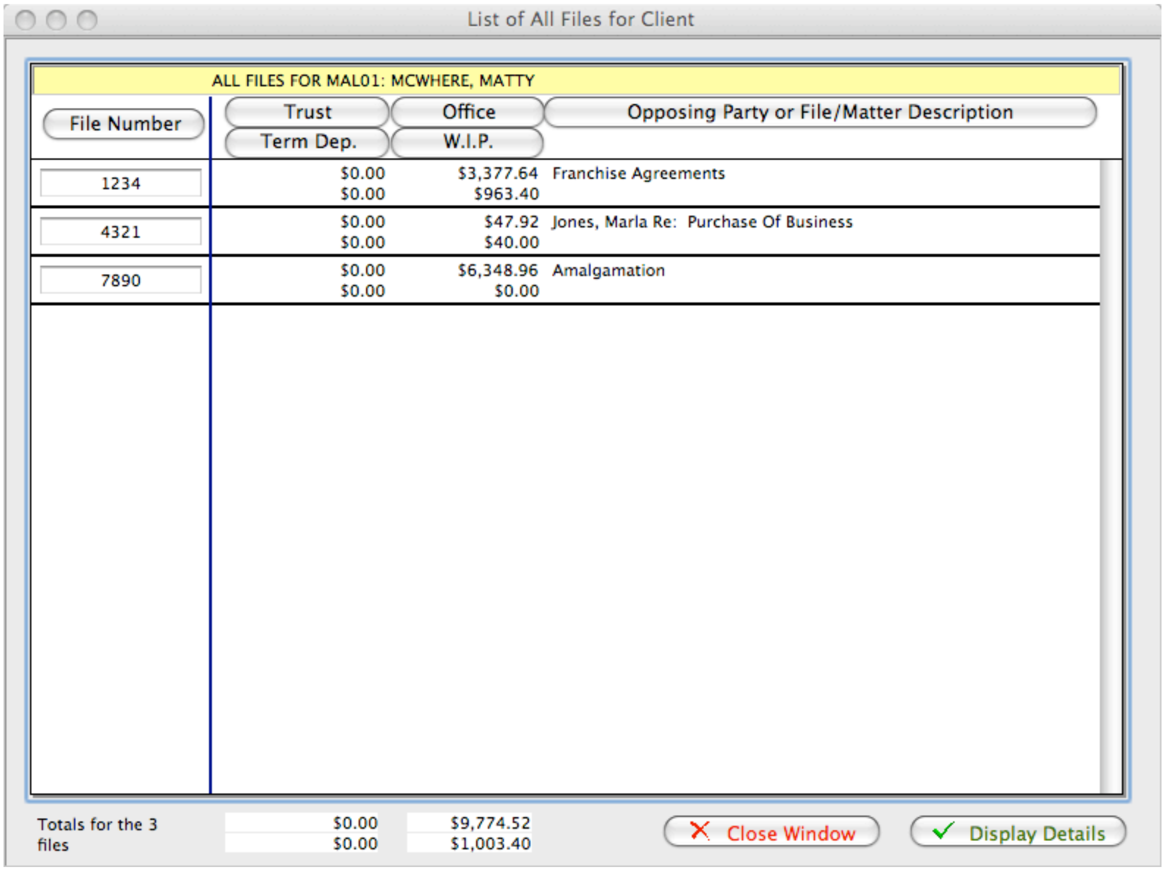
Client of the Firm

Subject to Sales Tax
Subject to Goods and Services Tax

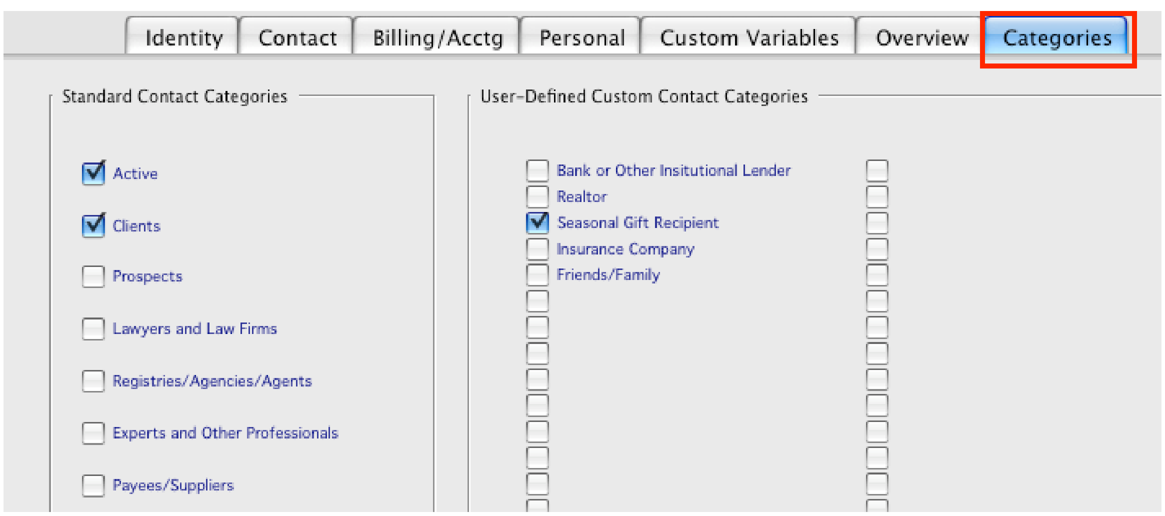
Beer Hatter

Familiar Name (for letters, etc.)	Matt McWhere
Address	c/o Walt Mears 1095 W. Pender Counselville, Colorado 76543 Attention: Walt Mears
	Dear Mr Mears:
Telephone	
Home	(554) 555-5556
Work	(554) 555-2222
Fax	(554) 555-3333
Cell/other	(554) 555-4444
E-Mail	beerhatter@maltwares.com
Notes	Walt seems content for now to have his business as a proprietorship, but we should keep reminding him about the benefits of incorporation

List client Files Button: This button is a quick way to list all files and balances for a particular client. A sample of the window this button opens is shown below. Click on a file number to select it and use the “Display Details” button at the bottom of the window to be taken directly to the “File/Matter Information” window for that file.



1.09 Client Contact Categories



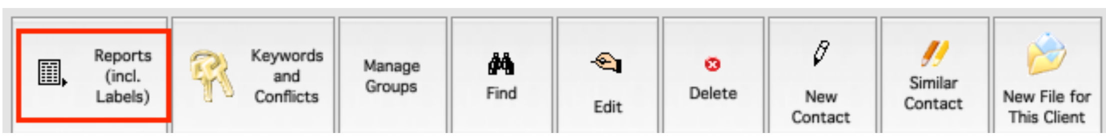
Standard Contact Categories: New client/contact records are automatically identified as “active” and “clients” but you may change that if you wish. When you are entering data for a new contact, and if that contact is not a client, be sure to click “off” the Client category. If the contact is someone you need to pay, make sure the Payee/Supplier category is selected.

Multiple Categories

Any name/contact may have as many selected categories as apply for that name. For example, a "client" could also be a payee and/or a law firm or bank.

User-Defined Custom Contact Categories: Custom categories may be defined globally for your office, to satisfy the needs of individual types of offices. To establish custom categories that can be used by anyone in the firm for any contact record, go to the Setup tab and under Codes and Abbreviations click on Contact/Name Categories to enter categories that are not already included among the basic LawStream categories. Any number of custom categories can be assigned to a contact record in addition to the standard categories. See the Setup/Preferences chapter and the Common Tasks section of this chapter for further information.

1.10 Client Contact Reports Button



The Reports button will give you access to a variety of client/contact reports, as well as mailing label and conflict checks. Select the Records to appear in the report, and the type of report you want to print, and click OK or press Enter to produce the report.