

CLIENTS AND OTHER CONTACTS

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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.

The screenshot displays the LawStream software interface with the 'Contact' tab selected. The main window shows the contact details for 'MCWHERE, MATTY'. The 'Overview' sub-tab is active, showing fields for Name, Familiar name, Contact Name, Company Name, Department, Job Title, Address, Phone numbers, E-mail, and Web-site address. A note at the bottom left states: 'Walt seems content for now to have his business as a proprietorship, but we should keep reminding him about the benefits of incorporation'. The record was last updated on 2008 06 27 11:57. On the right, a list of associated files is visible, including '987 (LAMAR) Lamar West: Test File', '9875 (TRA01) Trawma, Les: Will And Powe', 'TRUSTINTEREST (LAMAR) Lamar West: Trust interest', '1234 (MAL01) Malt Wares: Franchise Agree', '2 6789 (TRA01) Trawma, Les: Miscellaneous', and '3456 (GEO04) George, Georgina: Last Will'. The bottom of the window features a toolbar with icons for Reports, Keywords and Conflicts, Manage Groups, Find, Edit, Delete, New Contact, Similar Contact, and New File for This Client, along with 'Cancel' and 'OK' buttons.

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").

The screenshot shows the 'Identity' tab of the Contact Entry Window. The 'Identity' tab is highlighted with a red box. The form contains the following fields and sections:

- Name:** THIK, THEODORE AND THELMA
- Code:** THI01
- Familiar name:** Ted and Tilly Thik
- Optional Corporate/Institution/Business Information:**
 - Contact/attention:
 - Company Name:
 - Department:
 - Job Title:
- Optional Name Details:**
 - Prefix: (P)
 - First: (F)
 - Middle: (M)
 - Last: (L)
 - Suffix: (S)
- Buttons:** Create Familiar Name from P F L, Create Familiar Name from F L, Create Familiar Name from F L S, Create Familiar Name from P F L S
- Other fields:** Referring Attorney from this firm: [], Group: [], Code for contact who referred client to firm: [], Source of referral of client to firm: []

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 TH101 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.

The screenshot shows the LawStreamPro software interface. The 'Setup' tab is selected in the top navigation bar. A dialog box titled 'Minimum Expected Data for New Client Names' is open, prompting the user to select which types of information to prompt for. The 'Identity Details' checkbox is checked and highlighted with a red box. Other options include Contact Information, Billing Preferences, Personal Information, and Custom Variables. The 'OK' button is highlighted with a green checkmark. In the background, the 'Expected Name Data' button is highlighted with a red box.

1.04 Contact Information

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

The screenshot shows the 'Contact' tab selected in a software interface. The form is divided into several sections:

- Identity:** Includes fields for 'First part of address (street, number, suite):' (2 Third Avenue), 'Second part of address (city, etc., excluding postal/zip code):' (Counselville), 'State or Province (if not included in second part of address):' (CA), and 'Contact ("Attention") Name:'. A 'Salutation:' field contains 'Dear Mr and Ms Thik:'.
- Phone/Fax Numbers:** A table with columns for 'Local', 'Extension', and 'Notes/Description'. It lists 'Work' (745) 123-4567, 'Home' (555) 456-7891, 'Cell', 'Toll-free', 'Fax', 'Alt. Phone 1', 'Alt. Phone 2', and 'Alt. Fax'. A checkbox 'OK to leave phone messages' is checked.
- Main Address Type:** Radio buttons for 'Undefined', 'Home' (selected), 'Other', 'Work', and 'Temporary'.
- Postal Code:** 90210
- Country:** (empty)
- E-Mail:** TT@infonet.com
- Alternate E-Mail:** (empty)
- Description:** (empty)
- Web-site address:** (empty)
- Alternate Address Information:** Fields for 'Street Address', 'City', 'Prov/State', 'Country', and 'Postal Code'. 'Alternate Address Type' radio buttons are set to 'Undefined'.
- Time zone difference:** 0.00
- Buttons:** 'Go!' with a globe icon, 'Copy contact info from other name record...', and 'Copy Address to Clipboard'.

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:

Phone/Fax Numbers			
	Local	Extension	Notes/Description
Work	(111) 222-3333	<input checked="" type="checkbox"/>	444 office hours 8:30 - 6:00
Home	(234) 678-5612	<input checked="" type="checkbox"/>	doesn't like early a.m. calls
Cell	(123) 456-7898	<input type="checkbox"/>	
Toll-free			
Fax	(987) 234-5656	<input checked="" type="checkbox"/>	
Alt. Phone 1			
Alt. Phone 2			
Alt. Fax			

OK to leave phone messages

this could be very handy if a file is particularly sensitive

"local" means long-distance dialing is not required

click one of these, to expand the box containing notes or description

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.

Enter the exact name-code for the name whose contact information is to be used...

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.

The screenshot shows a software interface with several tabs: Identity, Contact, Billing/Acctg (highlighted with a red box), Personal, Custom Variables, Overview, and Categories. The Billing/Acctg tab is active, displaying the following fields:

- Suppress Statements
- Suppress interest
- Preferred Bill Format: Total Time Only - No Individual Time Details
- Reference number (if any) used by this client to refer to this firm: [Text Field]
- (Specialized field, used only for LEDES billing purposes)
- Expense Code: [Text Field]
- These fields are for information only:
 - Value of total unbilled work in progress for client: 9330.00
 - Value of total billed work in progress for client: 0.00
 - Critical point for total unbilled work in progress: 0.00
 - Critical point for total billed work in progress: 0.00
- Tax Info (Canada Only):
 - GST Status: T
 - PST status: T
 - Special Tax Rate: [Text Field]
 - Special Tax: [Text Field]

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.

The screenshot shows the 'Billing/Acctg' tab in the software interface. The 'Expense Code' field is highlighted with a red box and contains the value '5330 Office Utilities'. Other fields include 'Suppress Statements', 'Suppress interest', 'Preferred Bill Format', and 'Reference number'. A summary box on the right shows values for unbilled and billed work in progress.

These fields are for information only	
Value of total unbilled work in progress for client	0.00
Value of total billed work in progress for client	0.00
Critical point for total unbilled work in progress	0.00
Critical point for total billed work in progress	0.00

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 screenshot shows a software interface with a top navigation bar containing tabs: Identity, Contact, Billing/Acctg, Personal (highlighted with a red box), Custom Variables, Overview, and Categories. Below the tabs, there are two main sections. The left section is titled 'General notes about this contact/client/name' and contains a text area with the text: 'main numbers are for Barbie Dahl; address is Barbie's; separate contact records refer to each one individually'. The right section is titled 'Picture (paste from other application):' and contains a large empty rectangular area. Below these sections, there are several form fields: Birthday: 9 MAR 1959; Birthplace: New York, New York; Social security number: 123456789; Tax Payer I.D.: (empty); Occupation: Model; Employer: Mattel; Start date of current employment: (empty); Gender: F; First contact with this contact: (empty); County (Info only): (empty); Identification Type: DRIVER'S LICENSE; Identification Number: 987654321.

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:

Character variables ... and their values	
eye color	brown
current residence	Smallville
current caregiver	Donna Donaldson

Numeric variables ... and their values	
heightinches	49.00
weightinpounds	75.00

Boolean (yes/no) variables and values	
clientsguardian	<input checked="" type="checkbox"/>
	<input type="checkbox"/>

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).

Sort: file	Refresh	Sort: na
<input type="checkbox"/>	987 (LAMAR)	Lamar West: Test File
<input type="checkbox"/>	9875 (TRA01)	Trawma, Les: Will And Powe
<input type="checkbox"/>	TRUSTINTEREST (LAMAR)	Lamar West: Trust Interest
<input type="checkbox"/>	1234 (MAL01)	Malt Wares: Franchise Agree
<input type="checkbox"/>	2 6789 (TRA01)	Trawma, Les: Miscellaneous
<input type="checkbox"/>	3456 (GEO04)	George, Georgina: Last Will

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.

MCWHERE, MATTY

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.

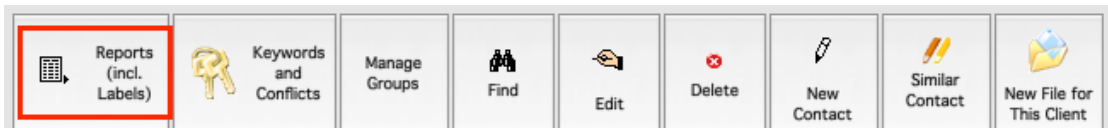


Multiple Categories

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.

