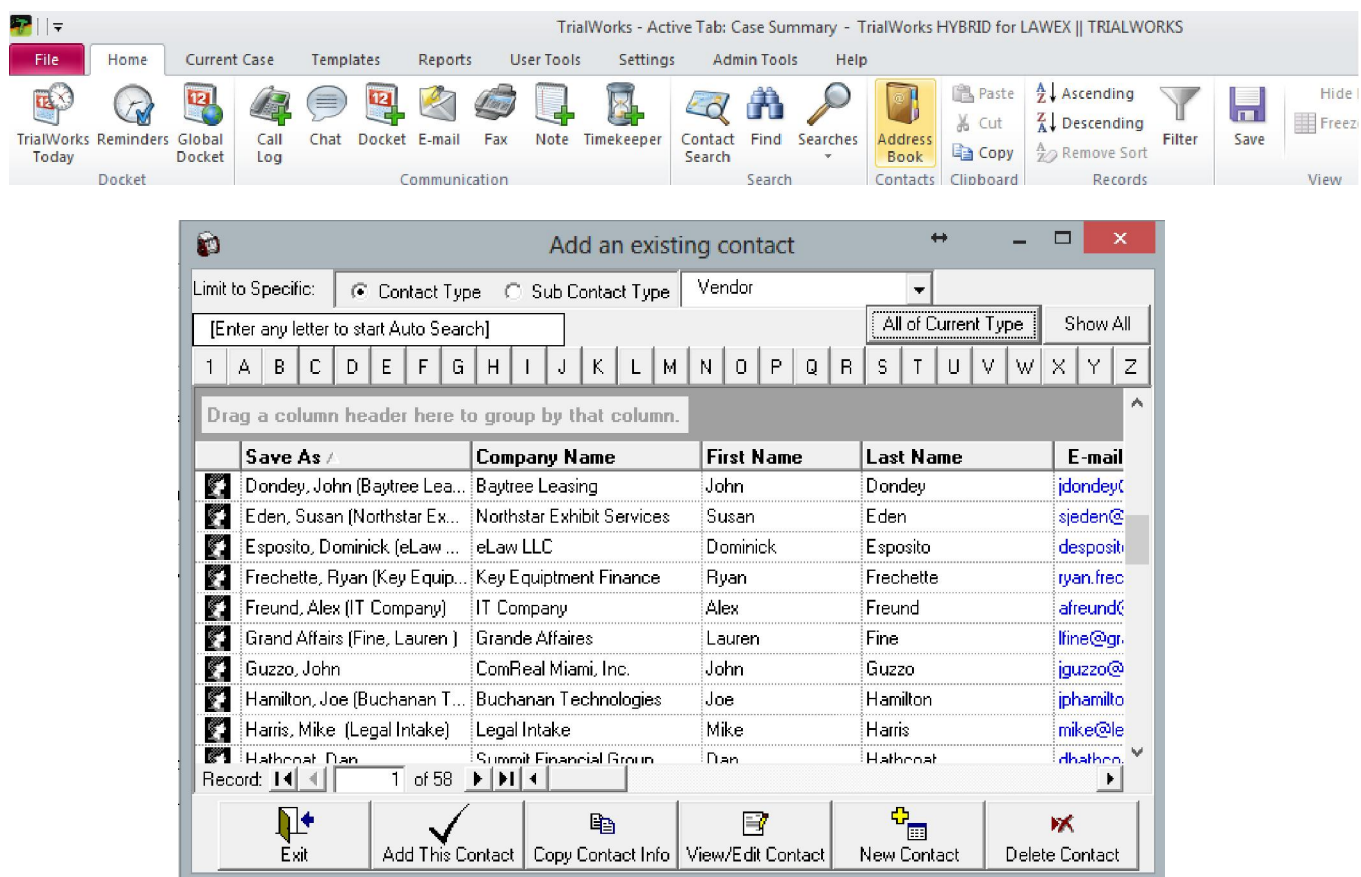

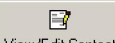



CONTACT MANAGEMENT

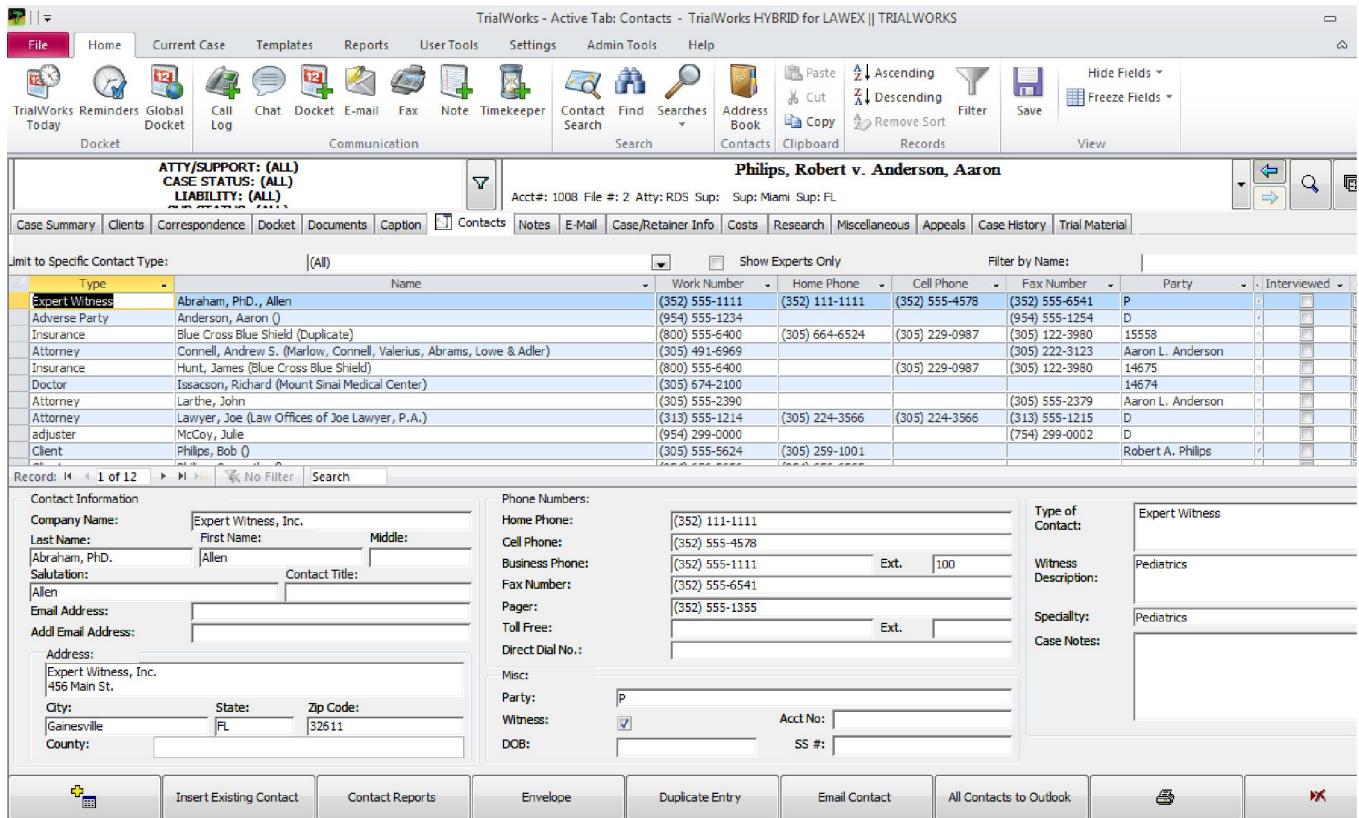
Managing your contacts is a key component to utilizing TrialWorks the most effective way possible. Verifying that the contact you want already appears in the Global Address Book will link that contact to a new case.



You can search your address book by contact type. You can also look for a contact by selecting "Show All" and searching alphabetically. From your address book, you have the ability to:

	add a contact record to TrialWorks
	edit an existing contact record
	add a contact to a case

You can link an existing contact to a case directly on the CONTACTS tab:



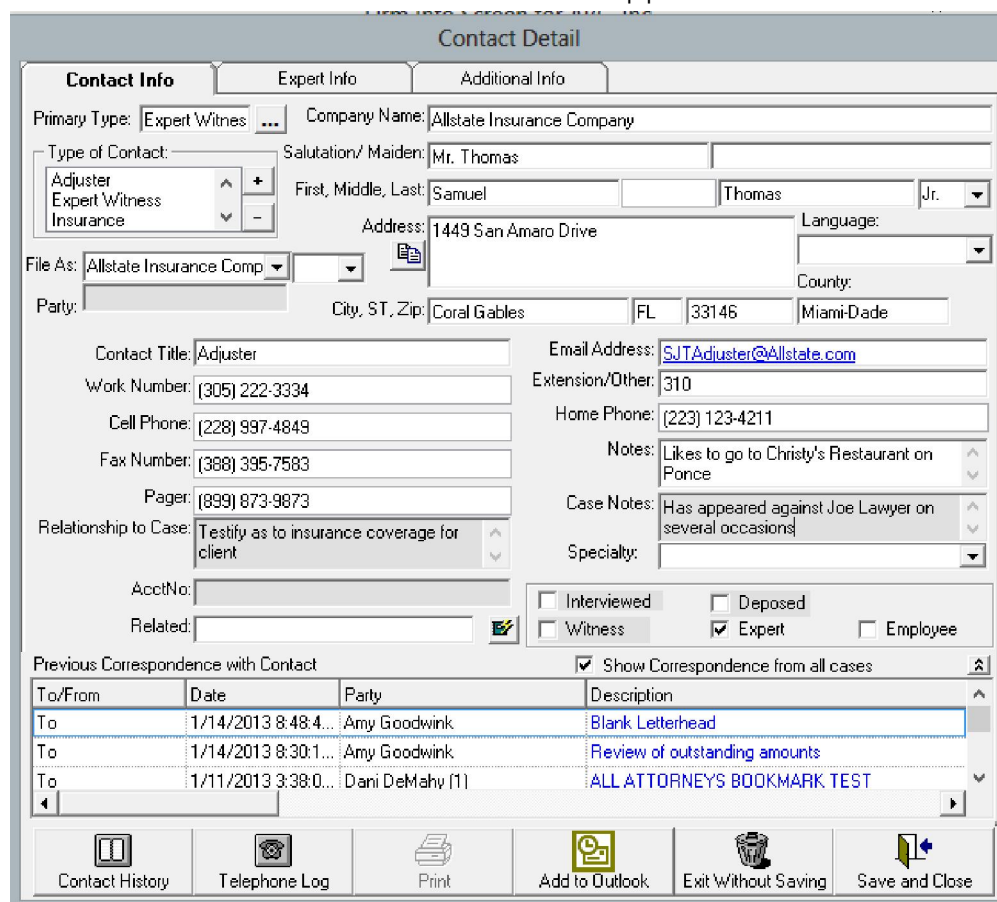
The screenshot shows the TrialWorks interface with the 'CONTACTS' tab active. The top menu bar includes File, Home, Current Case, Templates, Reports, User Tools, Settings, Admin Tools, and Help. The toolbar contains various icons for reminders, dockets, communication, search, and document management. The main window displays a list of contacts for the case 'Philips, Robert v. Anderson, Aaron'. The list includes columns for Type, Name, Work Number, Home Phone, Cell Phone, Fax Number, Party, and Interviewed. Below the list, there is a detailed view of the selected contact, 'Expert Witness, Inc.', showing fields for Company Name, Last Name, First Name, Middle, Salutation, Contact Title, Email Address, Address, City, State, Zip Code, Phone Numbers, and Misc. The bottom of the window features a button bar with options like 'Insert Existing Contact', 'Contact Reports', 'Envelope', 'Duplicate Entry', 'Email Contact', and 'All Contacts to Outlook'.

On the button bar use the Add a Contact (Yellow Plus Sign) to enter a contact not already found in TrialWorks.

Use "Insert Existing Contact" to choose from your global address book. This option allows you to link an existing contact into your current case.

Linking an existing contact will allow you to update a phone number or street address to any case and have it update the contact in all cases.

Every contact in TrialWorks has a contact record that appears in a Contact Detail Record:



NOTE: There are certain fields that are case-specific; those fields are highlighted in grey. These fields change depending on which case you're viewing the contact record from. This means if your contact is found in three different cases, those grey fields will update to their contact information relevant to the case you're in.

CONTACT TYPES

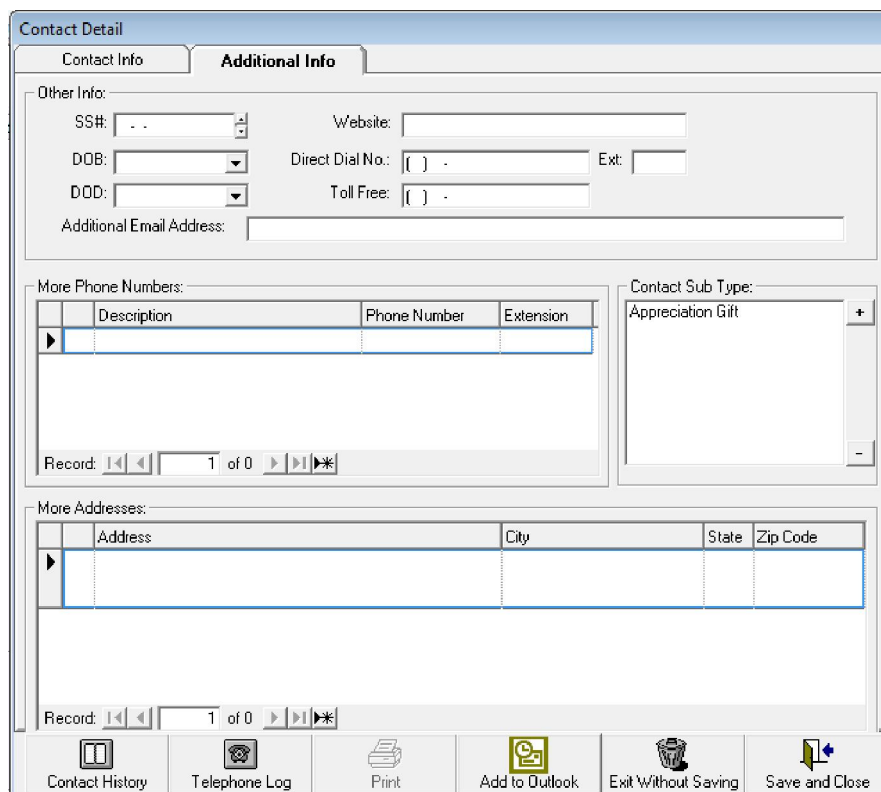
At the top left of your contact detail window, you have the "Primary Type" field. This gives your contact a contact type. Different contact types trigger different functions within TrialWorks.

- Insurance – allows for that contact to be used on the Insurance/Liens tab;
- Healthcare providers – (indicated in the library as Meds) – allows any contact to be used on the Medical tab.

ADDITIONAL CONTACT TYPES

Under “Primary Type” field, you are able to designate additional contact types in the box titled “Type of Contact”. These additional contact types allow you to add other contact types by which to label your contact record. For instance, your Expert Witness might also be a Doctor.

- The “Additional Info” tab within your Contact Detail window allows you to add additional addresses and phone numbers. Contact Sub Type box in this window allows for you to add a “sub-type” to designate which mailing list you would like your contact to be a part of.
 - Contact Sub Type allows for you to add a multiple “sub-types” to designate mailing or Christmas Card lists you would like your contact to be a part of.
 - In TrialWorks Version 10.4, you will have the ability to choose to send Correspondence to the “More Address” address if your contact has more than one listed in their contact record.



Contact Detail

Additional Info

Other Info:

SS#: [] Website: []

DOB: [] Direct Dial No.: [] Ext: []

DDD: [] Toll Free: []

Additional Email Address: []

More Phone Numbers:

	Description	Phone Number	Extension
▶			

Record: 1 of 0

Contact Sub Type:

Appreciation Gift

More Addresses:

	Address	City	State	Zip Code
▶				

Record: 1 of 0

Contact History Telephone Log Print Add to Outlook Exit Without Saving Save and Close



DON'T FORGET!

People often forget about is the ability to search by contact when looking for a case. The magnifying glass next to your case list drop down gives you this screen:

Case Search

Case Search

Search By:

☐ Case Name
 ☐ File Number
 ☐ DOA
 ☐ Acct. #
 ☒ Contact Information (Last name, First name, Company).
 ☐ Case/Index #
 ☐ Client Information (Last name, First name, Company, Party Name).
 ☐ Claim #
 ☐ Contact Social Security #
 ☐ Client Social Security #
 ☐ Master Client
 ☐ Property Address

Search

Done

Clear

Search Text:

☒ Free Text Search

Results:

You can enter a contact's name in the Search Text field and select the "Contact Information (Last name, First name, Company)" option to search for a case by a contact you know is associated to a particular case.

You can easily access all the contacts in the case you're working in without having to be in the Contacts tab. The drop down arrow will show you all of the contacts for that particular case.

Case

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