ADDING CONTACTS

In This Document:

Learn how to create contacts for your firm.

This document utilizes Soluno version 1.5.65. Screens may have been adjusted since publication.

OVERVIEW

This document examines how to open, add, and edit contacts/clients/vendors in Soluno®. It also describes using the Contact Manager function to view and/or change existing contact, client or vendor information.

IMPORTANT DEFINITIONS

There are a few key terms that should be understood before exploring this process.

- CLIENT CONTACT: The parties for whom your firm is working.
- CONTACT NUMBER: An alpha-numeric identifier for the client contact (can be up to 20 characters).
- FILE: The individual cases or matters worked on for a client.
- FILE NUMBER: A unique, alpha-numeric identifier for the file/matter (can be up to 20 characters).

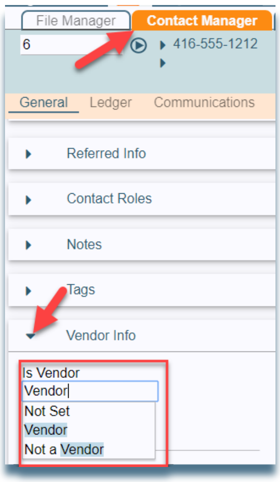
In addition to the above definitions, let's quickly cover the three categories of CONTACTS.

CONTACT AS A CONTACT: Create a contact to reference a business or individual. For instance, an outside counsel, opposing party, opposing counsel, or medical expert.

CONTACT AS A CLIENT: A contact can be made to represent a law firm's client. This type of contact is useful for managing files and providing a reference point for clients with single or multiple files.

CONTACT AS A VENDOR: When a contact is created in Soluno it can also be recognized as a vendor. This allows you to track vendors when working with accounts payable.

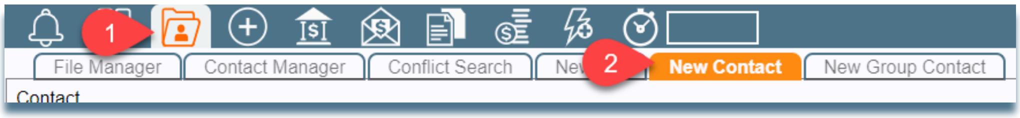
> *Note:* If you do not want a contact to be recognized as a vendor, you can change the contact's status by going to CONTACT MANAGER → VENDOR INFO



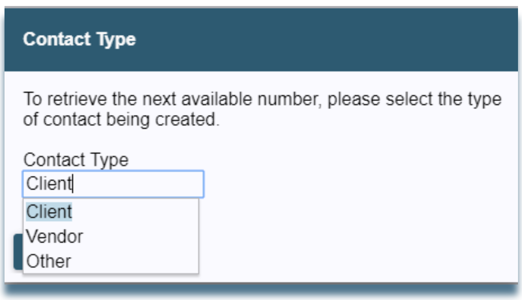
Now that we have a handle on what will be covered, let's explore how to add new contacts.

NEW CONTACTS

To add a new contact, start by going to CONTACTS AND FILES → NEW CONTACT. The new contact data entry fields will appear automatically.



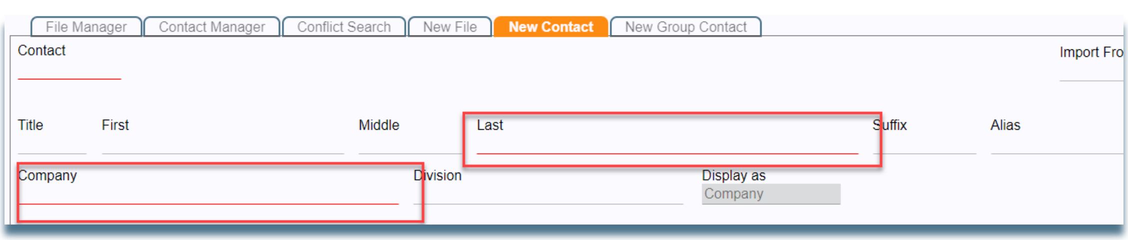
You will then be able to select a CONTACT TYPE from the drop-down list:



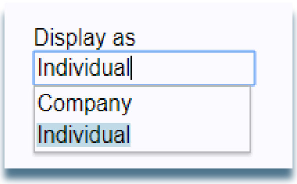
You may choose to arrange the CONTACT NUMBER schemes by CONTACT TYPE so you can easily distinguish between clients, vendors, and others. When you select the CONTACT TYPE, Soluno will create the next number in the appropriate numbering scheme for you. If needed, you can manually adjust this number.

To quickly add a new contact, only the LASTNAME and the COMPANY information must be input. These headings are identified with a red line under their respective fields.

Once these two fields are entered, you will be able to save your new contact.



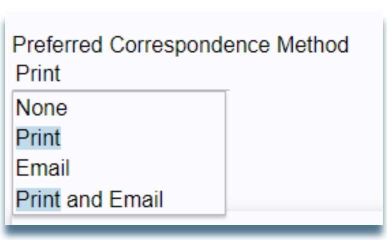
- If you fill out only the LASTNAME field, Soluno will automatically set the DISPLAY AS information to INDIVIDUAL.
- If you fill out only the COMPANY field, Soluno will automatically set the DISPLAY AS information to COMPANY.
- If both the LASTNAME and COMPANY fields are filled out, you can manually select how to display the contact using the DISPLAY AS field.



Alternately, you may also add contact information to the new contact via a .CSV file.

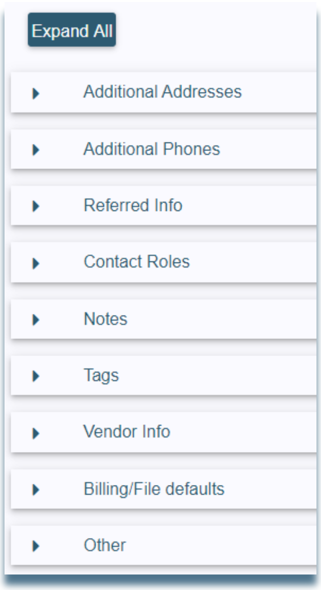
You can drag and drop the file into the drop box or click on the box to open your documents. If choosing from your documents, select the file and click OPEN. The screen will be populated with all information contained in the .CSV file, including additional addresses, phone numbers, and email addresses.

You can choose how you wish to communicate with this Contact using the Preferred Correspondence Method box. Select your preferred method of communicating from the drop-down list.



ADDITIONAL INFORMATION

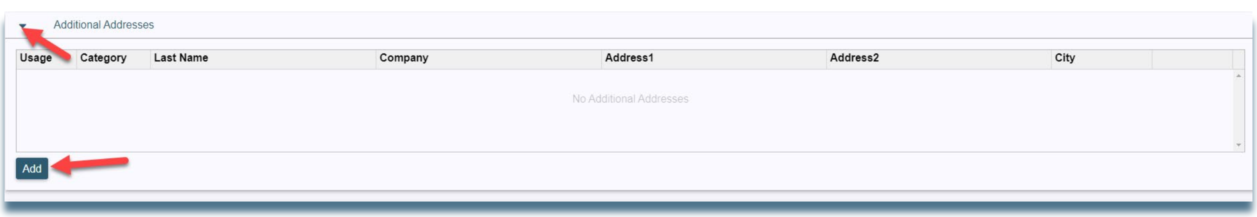
You have the option to add additional information for the contact by scrolling through the list of expandable menus and making your selections.



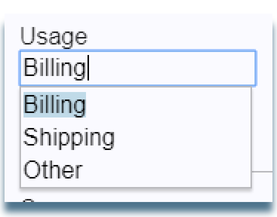
Let's explore the functions of the different expandable headings.

ADDITIONAL ADDRESSES

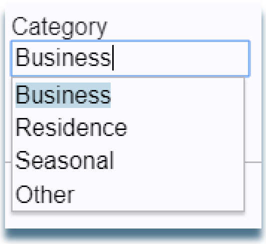
Here, you can enter any additional address the contact may have by using the ADD button at the bottom of the section.



Specify the USAGE of the new address by selecting from the drop-down list.



Enter the CATEGORY of the new address by selecting from the drop-down list.

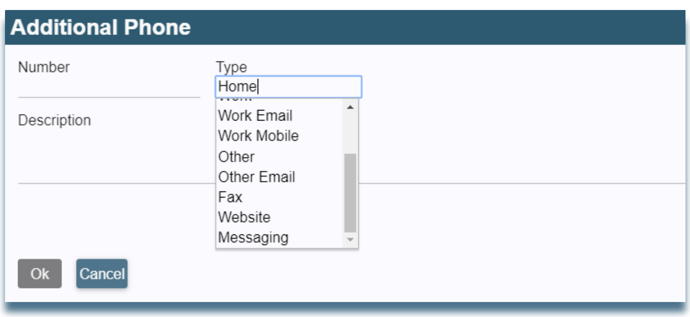


Fill out the information for this address and click the OK button at the bottom to save the information.

ADDITIONAL PHONES

This section is provided to log any extra numbers, emails, or websites for the contact.

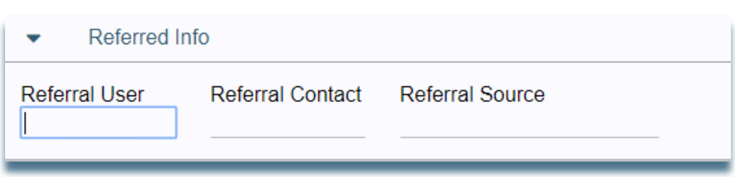
Once the ADD button is pressed, a new window will open where you can designate the contact data and select the type of contact method from a drop-down list.



Once the information has been entered, click the OK button at the bottom to save the information.

REFERRED INFO

Use this section to keep track of referrals. You can associate a user, contact, or source to a client as a referral. This can be used in the system for reporting, billing, collection, and compensation purposes.



CONTACT ROLES

Use contact types to categorize contacts into related groups. For example, a contact in Soluno could be categorized as an "expert witness", or as an "opposing party".

NOTES

This section can be used to add temporary "notes" as required. These notes will display while in the contact and file managers.

> *Example:* A client informs an Attorney that they are unavailable on Mondays. This information can be recorded in the notes.

TAGS

Use tags to categorize contacts into groups for marketing, mailing, and reporting purposes.

VENDOR INFO

Vendor Info entries are used in conjunction with Accounts Payable. If the contact is a client, then this section is not required. However, if the contact is a vendor, this section is used to identify them as such.

After defining the contact's DEFAULT GL ACCOUNT (General Ledger account), ACTIVITY CODE for entries involving the vendor; and whether a 1099 report needs to be produced you can add any applicable vendor arrangements.

> *Note:* To set up Vendor arrangements navigate to ADMINISTRATOR SETTINGS → CONTACT/CASEFILE → VENDOR ARRANGEMENTS.

BILLING DEFAULTS

This option allows you to predetermine the default BILLING, TAX, INTEREST, RATE and FILE GROUPS for all files associated to this contact.

> *Note:* This selection only allows you to select from your existing groups. New groups must be established within ADMINISTRATOR SETTINGS.

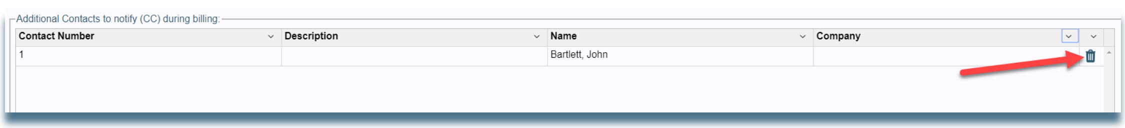
Under this heading you can also select the PREFERRED CORRESPONDENCE METHOD for this contact, this includes how the client/contact.

ADDITIONAL CONTACTS TO NOTIFY (CC) DURING BILLING

This area of the Billing/File Defaults section allows for the additional contact(s) to be included (CC'd) on invoices. For example, if you are billing a division within a business, and the accounting department also requires a copy of the invoice, this feature will help to streamline the process.

To begin, click in the LOOKUP WINDOW and type in a contact number or name. Once the correct existing contact has been identified, click on the ADD CONTACT button and their information will be added to the table below.

To remove an additional contact from being notified, click the TRASH CAN button on the right side of the contact.

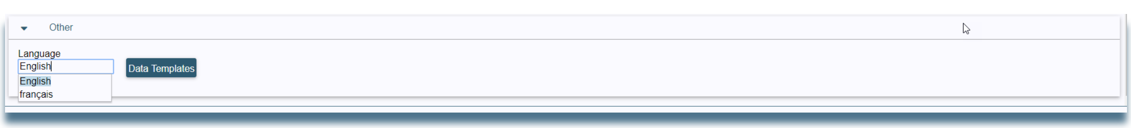


You may also select another Contact to be an Additional Payee for the client.

OTHER

You can select the language preference for the contact in this section.

In addition, you can use data templates to add additional custom fields to the contact.



FINISHING UP

Once you have added all your desired contact and additional information, click the SAVE button to add your new contact.

You will be able to view and edit your new contact and all other contacts in the CONTACT MANAGER.