

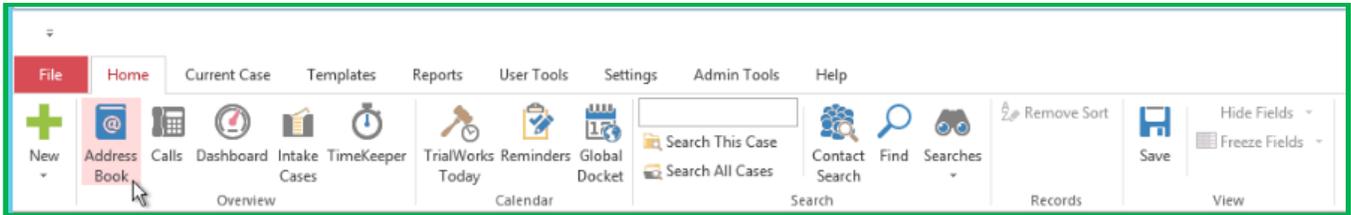
Contact Management

Version 11 and higher

Overview of Contact Records in TrialWorks.

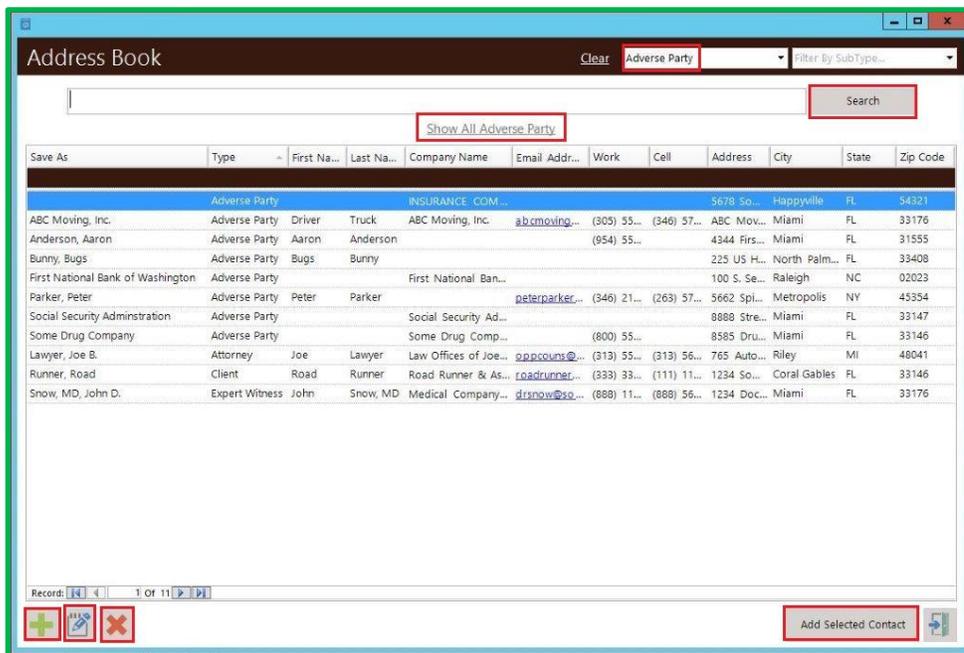
Address Book

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 Clear at Contact Type, "Show All" and searching alphabetically. From your Address Book, you have the ability to:

- Add or Delete a new Contact Record to TrialWorks
- Edit an existing Contact Record in TrialWorks
- Add a selected Contact to a case in TrialWorks



TrialWorks LLC

Tel 305.357.6500
Fax 305.357.6499

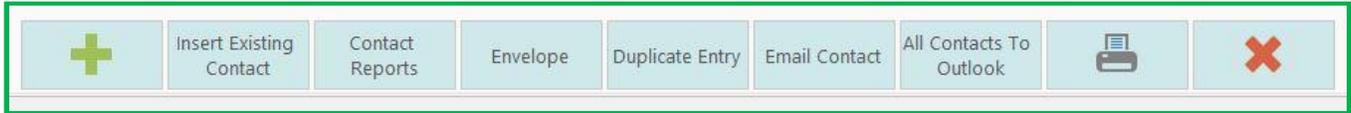
1550 Madruga Ave, Ste 508
Coral Gables, FL 33146

<http://www.trialworks.com>
training@trialworks.com



Additional Options

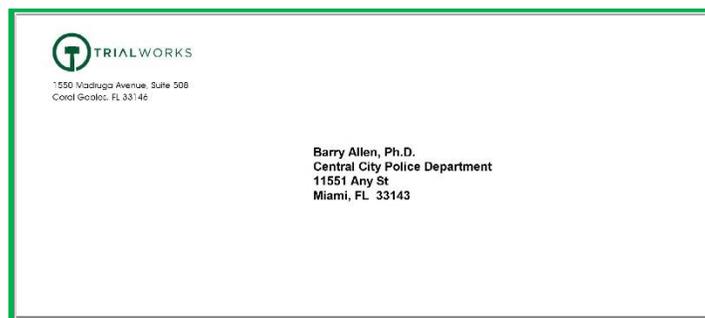
You can also perform nine (9) additional functions directly from the CONTACTS TAB button bar:



1. **Add a Contact** (Green Plus Sign) to enter a contact not already found in TrialWorks.
2. **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.
3. **Contact Reports** - Case Report; Witness Report; Case Report Limited by Contact; Case Report Grouped By; Expert Report; and Expert Information.



4. **Envelope** - Print an envelope directly from CONTACT TAB.



- Duplicate Entry** - When you have contact information that is the same for multiple people (e.g., Husband, Wife and Child living at same address,) instead of re-typing the fields, simply use the “Duplicate Entry” feature, which will copy the common data from the first record and allow you to create a new record entry for the next person.

Allen, Barry	barry@justicesociety.com	(325) 111-1111	(315) 333-3333	(315) 444-4444	(315) 222-2222
Allen, Barry (Duplicate)	barry@justicesociety.com	(325) 111-1111	(315) 333-3333	(315) 444-4444	(315) 222-2222

Contact Detail

Allen, Barry (Duplicate)

Contact | Additional | Cases | Communications | History

Role
 Type: Team Manager
 Sub Type:
 Employee Expert Deposed Interviewed Witness

Name
 First: Barry Prefix/Suffix: Ph.D.
 Middle:
 Last: Allen Salutation: Mr. Allen
 Company: Central City Police Department
 Save As: Allen, Barry (Duplicate)

Address
 Address: 124 Any St
 City: Central City
 State/Zip: NY 10666
 County:

Personal
 Gender:
 SSN: ###-##-5781
 DOB/DOD: 3/5/1986 6/3/2032
 Language:

Contact
 Work: (325) 111-1111
 Cell: (315) 444-4444
 Home: (315) 222-2222
 Fax: (315) 333-3333
 Direct Dial: (800) 357-5844
 Toll Free: (800) 377-5844
 Email: barry@justicesociety.com
 Alternate Email:
 Website:

Other
 Title: Justice Society of America
 Specialty:
 Related:
 Account #:
 Party: ---

Notes
 Notes

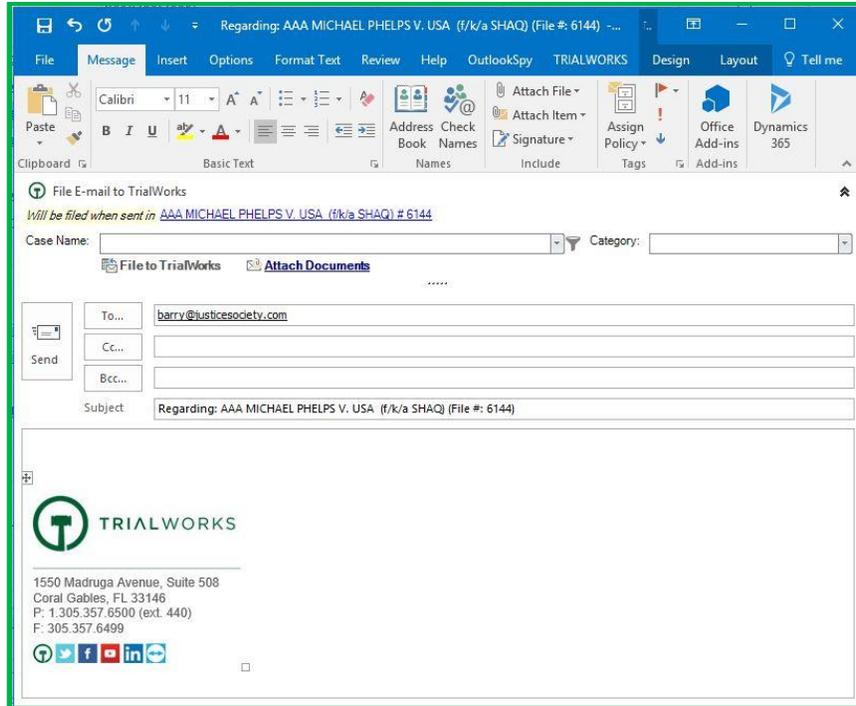
Case Notes
 Notes

Relationship To Case
 Relationship To Case

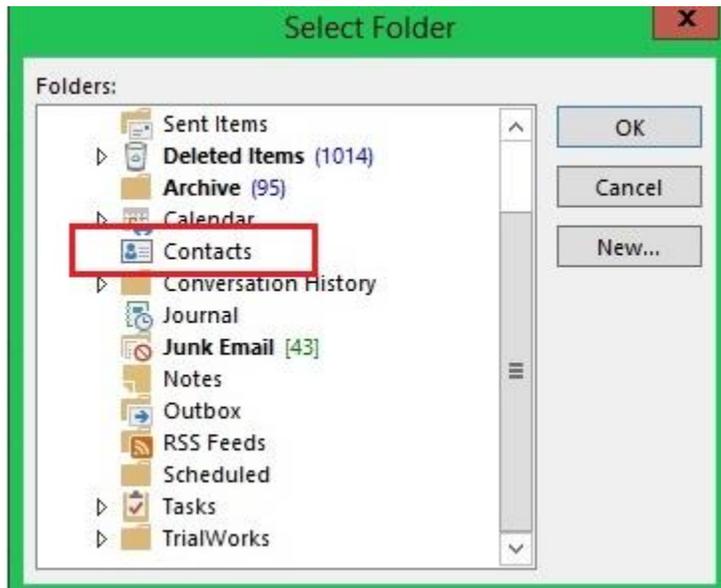
Add To Outlook | Call Log | Copy To Clipboard



6. **Email Contact** - Automatically generate an Outlook email that will be linked to the case.



7. **All Contacts to Outlook** - Send all of the Contacts from the Case to your Outlook Contacts.





8. **Print** - Print all data fields for a Contact record to paper. Or, you can email the contact record or convert it to a PDF, Word or Excel file!

Type of Contact: Client, Hospital, Insurance, Judge, Videographer

Company Name: Central City Police Department **Image:**

Salutation: Mr. Allen

First, Last Name: Barry Allen

Billing Address: 124 Any St

Party: Barry A Allen

City, state, zip: Central City NY 10666

Contact Title: Justice Society of America **Email Address:** barry@justicesociety.com

Work Number: (325) 111-1111 **Extension/Other:**

Car Phone: (315) 444-4444 **Home Phone:** (315) 222-2222

Fax Number: (315) 333-3333 **Notes:** Notes

Pager: (315) 555-5555 **Allen, Barry**

Relation to Case: Save To All Cases

Previous Correspondence with Contact

Date	To/From	Party	Hyperlink	Author	Description
10/ 27/ 2017	To	Tod Cardoso	Insurance Affidavit	Patrice Gimenez	Insurance Affidavit
07/ 31/ 2017	To	Tod Cardoso		Andres Diaz	
07/ 31/ 2017	To	Tod Cardoso	Maintenance Expiring NE	Patrice Gimenez	Maintenance Expiring NEW 2017

Previous Phone Calls with Contact

9. **Delete** - Delete a Contact record from the case *without deleting* the Contact record from the database by clicking the **Red X** button.



CONTACT DETAIL RECORD

Details of every Contact appear in a Contact Detail Record:

Allen, Barry

Contact Additional Cases Communications History

Role
Type: Videographer
Sub Type:
 Employee Expert Deposed Interviewed Witness

Name
First: Barry Prefix/Suffix: Ph.D.
Middle:
Last: Allen Salutation: Mr. Allen
Company: Central City Police Department
Save As: Allen, Barry

Address
Address: 124 Any St
City: Central City
State/Zip: NY 10666
County: Westchester

Personal
Gender: Male
SSN: ###-##-5781
DOB/DOD: 3/5/1986 6/3/2032
Language: Italian

Contact
Work: (325) 111-1111
Cell: (315) 444-4444
Home: (315) 222-2222
Fax: (315) 333-3333
Direct Dial: (800) 357-5844
Toll Free: (800) 377-5844 560
Email: barry@justicesociety.com
Alternate Email: barry.allen@ccpd.gov
Website:

Other
Title: Justice Society of America
Specialty:
Related:
Account #:
Party: ---

Notes
Notes

Case Notes

Relationship To Case

Add To Outlook Call Log Copy To Clipboard

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.



In addition to the primary Contact Record information, there are four (4) additional tabs:

1. Additional - Contains multiple phone numbers, addresses and expert documents.

Phone Numbers

Description	Phone Number	Extension

Addresses

Label	Address	City	State	Zip	Include In Service List
Home	123 Any Street	Coral Gables	FL	33146	<input type="checkbox"/>
Other	11551 Any St	Miami	FL	33143	<input type="checkbox"/>

Expert Documents

Date	Link	Type	Notes
		Breakdown	TESTIMONY TYPE: Plaintiff Exper...
		Jury Verdict Report	
	New Text Document (2).txt	Transcript	TESTIMONY TYPE: Plaintiff Exper...
2/8/2016	New Microsoft Word Document.docx	Curriculum Vitae	

2. Cases - This sub-tab displays every case that the Contact record is linked to as a contact. Note that the Contact may participate in other cases in different Types of Contacts.

Cases where contact appears in: (Filter By Case Status)

Case Name	File #	Type Of Contact	Case Status
AAA MICHAEL PHELPS V. USA (f/k/a SHAQ)	6144	Videographer	Substitute
Monroe, Mickey	10607	Client, Hospital, Insuran...	Referred Out
Wells, Harrison	10808	Team Manager	Settled
Wells, Harrison G.	11194	Client, Hospital, Insuran...	Settled
Wright, Vickie M. (Testing Case)	11130	Police Precinct	Substitute



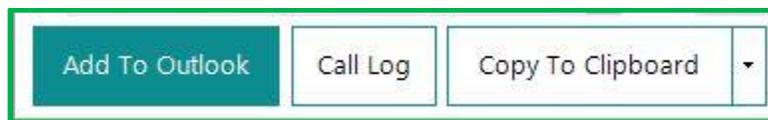
3. Communications - Displays every communication this Contact has had in all cases.

Date	Description	Link	Link2	Tab	Author	Case Name	Case Status
10/27/2017	To: Allen, Barry. Ins...	Insurance Affida...		Correspond...	Patrice Gimenez	AAA MICHAEL PHELPS V. U...	Substitute
10/10/2017	To: 'barry@justices...	EMAIL		E-Mail	Robb Steinberg	AAA MICHAEL PHELPS V. U...	Substitute
9/25/2017	To: Allen, Barry. 1s...	1st Clnt Ltr		Correspond...	Seth Gram	Wells, Harrison	Settled
8/9/2017	To: Allen, Barry. At...	Attorneys		Correspond...	Vickie Wright	Wright, Vickie M. (Testing C...	Substitute
8/9/2017	To: Allen, Barry.			Deposition	Diane Dannois	AAA MICHAEL PHELPS V. U...	Substitute

4. History - Displays all historical transactions of changes to this Contact Record.

Changed By	Date	Type	Company	Salutation	First Name	Last Name	Address	City
sgram	9/19/2017 11:57:23 AM	Videographer	Central City Police Department	Mr. Allen	Barry	Allen	124 Any St	Central City
sgram	7/18/2017 12:57:44 PM	Client	Central City Police Department	Mr. Allen	Barry	Allen	124 Any St	Central City
sgram	7/18/2017 12:57:12 PM	Team Manager	Central City Police Department	Mr. Allen	Barry	Allen	124 Any St	Central City
sgram	6/1/2017 3:37:54 PM	Team Manager	Central City Police Department	Mr. Allen	Barry	Allen	124 Any St	Central City
sgram	5/19/2017 11:32:37 AM	Attorney	Central City Police Department	Mr. Allen	Barry	Allen	124 Any St	Central City

Finally, the Button Bar at the bottom of the Contact Detail display three additional features, allowing you to add the Contact Record to Outlook, create a Call Log entry, and Copy to Clipboard.



CONTACT TYPES: Global and Case Specific

Contact Types are used to categorize contact records in TrialWorks, because a person can have different roles in different cases. 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 Contacts Type library as Meds) – allows any contact to be used on the Medical tab.
- When a new contact record is created, the Contact Type selected becomes the *global type* for that record.

The *global type* means that this is the contact’s main identification. “Who is this person?” In the picture below, we see the checkbox checked for client because Barry Allen is the firm’s client. This is Mr. Allen’s *global type*.

The screenshot shows the 'Contact Detail' window for Barry Allen. The 'Role' section has 'Client' selected as the 'Sub Type' with a checked checkbox. The 'Name' section shows 'Mr. Allen' as the last name. The 'Address' section shows '124 Any St, Central City, NY 10666, Westchester'. The 'Personal' section shows 'Male', SSN '###-##-5781', DOB '3/5/1986', and Language 'Italian'. The 'Contact' section shows various phone numbers and email addresses. The 'Other' section shows 'Justice Society of America' as the title. The 'Case Notes' and 'Relationship To Case' sections are empty. The 'Account #' and 'Party' fields are also empty. The form has a green border and a title bar that says 'Contact Detail'.



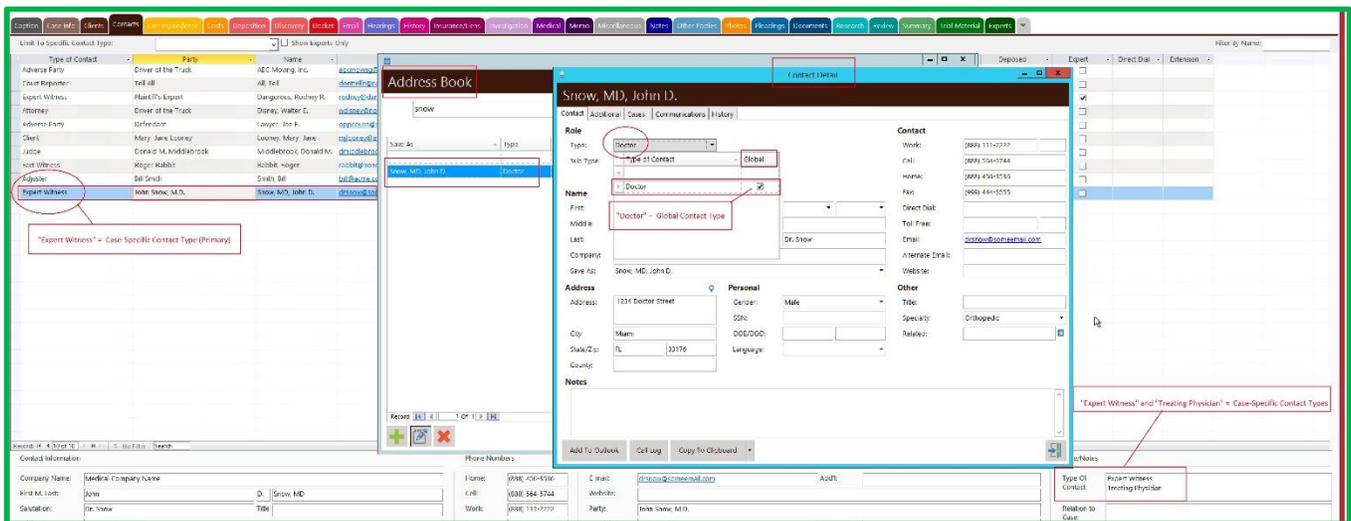
Generally speaking, most contacts have just one *global* contact type. However, because a contact may have multiple roles in a case, TrialWorks also provides for the ability to distinguish between a *global* and *case specific type* for each Contact Record.

You can modify a Contact Type to reflect one or multiple roles in a particular case by selecting from the dropdown and adding the new Contact Type(s) to the Contact Detail. *For this new, case specific type, however, you would NOT check the global box setting.* Notice in the image above that opening a Contact Record within a case shows fields shaded gray in the Contact Detail window. Shaded fields show case specific details including the new case Contact Types.

What Information Will The Contacts Tab List Reflect?

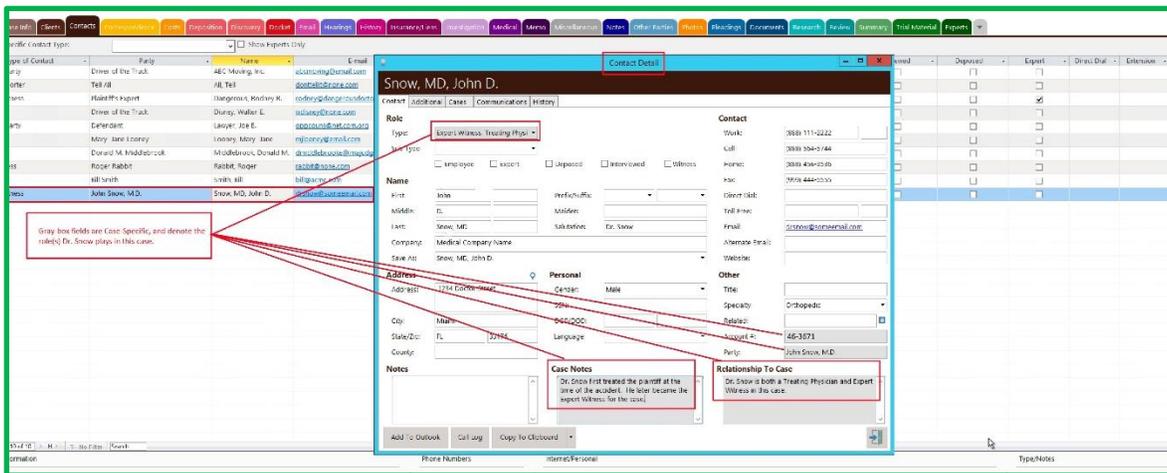
The Case Specific Contact Types for each Contact Record will show in two ways:

1. The first contact type entered shows in the list.
2. Below, in the contacts preview, the lower righthand corner reveals *all* of the contact types that contact has for *this particular case only*.



Notice the subtle distinctions between the Contact Detail from the Address Book (above) versus the Contact Detail from the Case Specific entry (below):





Helpful Hints

1. When identifying a Contact's Global identification, there should be only one. Remember, a doctor, is a doctor, is a doctor. Whether the doctor is a treating physician, an expert witness, or an adverse party, the *global* contact type is still doctor.

Think of it this way:

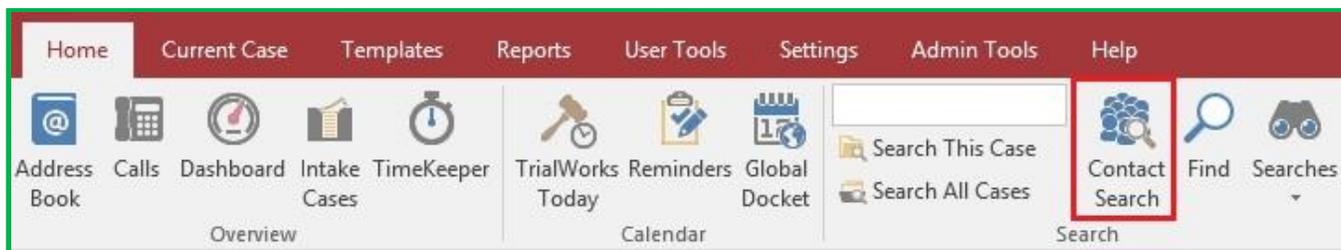
<u>GLOBAL TYPE</u>	<u>CASE-SPECIFIC TYPE</u>
Doctor	Treating Doctor
	Expert Doctor

2. If you never make a change to a contact's Contact Type, you will always see the global type.
3. Once you designate a case specific type to a contact record, the global type disappears and you'll only view the case specific type. Remember, this is the critical role for that case.

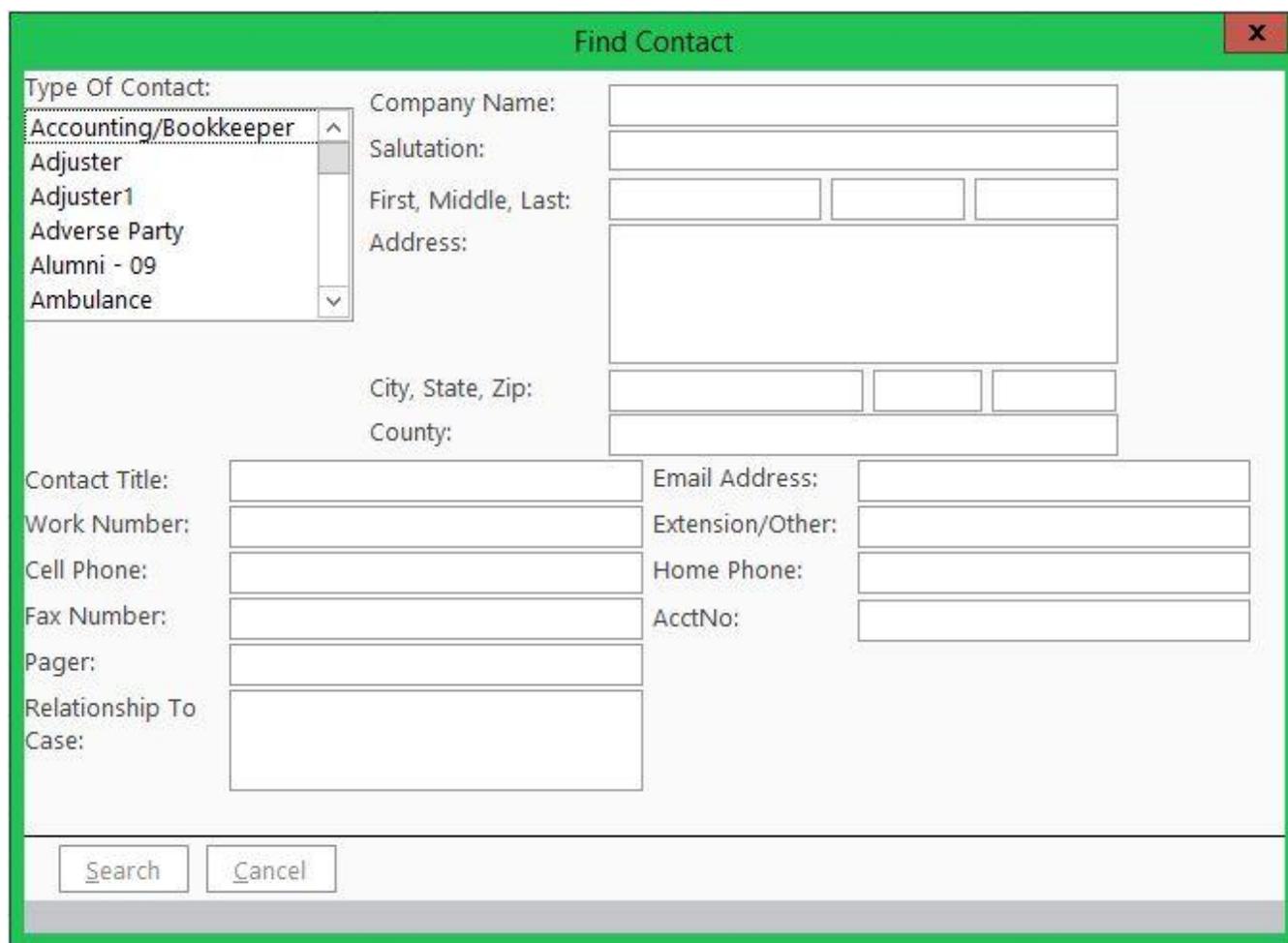


SEARCHING FOR A CONTACT

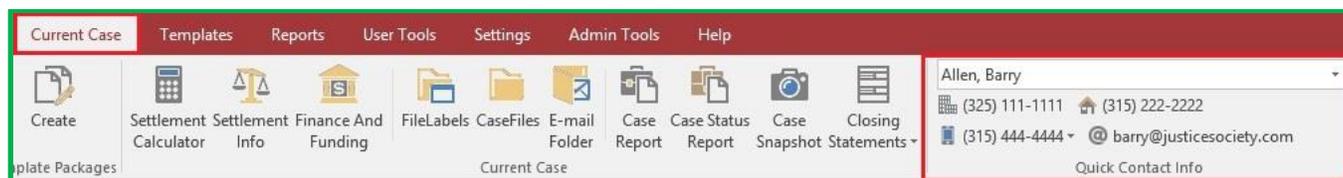
You can conduct a simple search for a contact by clicking on the Contact Search button on your Home Ribbon:



This will generate the following detail window, where you can enter information into any of the fields to search for your contact. Enter as much or as little that you need.

A screenshot of the 'Find Contact' detail window. The window has a green title bar with the text 'Find Contact' and a close button (X). The main area contains several input fields and a dropdown menu. The 'Type Of Contact:' dropdown menu is open, showing a list of options: Accounting/Bookkeeper, Adjuster, Adjuster1, Adverse Party, Alumni - 09, and Ambulance. The 'Company Name:' field is a single-line text box. The 'Salutation:' field is a single-line text box. The 'First, Middle, Last:' field consists of three separate single-line text boxes. The 'Address:' field is a large multi-line text box. The 'City, State, Zip:' field consists of three separate single-line text boxes. The 'County:' field is a single-line text box. The 'Contact Title:' field is a single-line text box. The 'Work Number:' field is a single-line text box. The 'Cell Phone:' field is a single-line text box. The 'Fax Number:' field is a single-line text box. The 'Pager:' field is a single-line text box. The 'Relationship To Case:' field is a single-line text box. The 'Email Address:' field is a single-line text box. The 'Extension/Other:' field is a single-line text box. The 'Home Phone:' field is a single-line text box. The 'AcctNo:' field is a single-line text box. At the bottom of the window, there are two buttons: 'Search' and 'Cancel'.

QUICK CONTACT INFO: When working in a case, use the Current Case toolbar on the Ribbon to easily access all the contacts in the case without having to be on the Contacts tab. The dropdown arrow will show you all of the contacts for that particular case.



If you're interested in learning more about Contact Management within TrialWorks, please contact Training at (305) 357-6500.

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