CONTACT HELPER

Quick Reference

What Contact Helper Does:

Contact Helper contains three separate tools to update the critical contacts on a matter as well as to maintain and export mailing lists.

Interface:

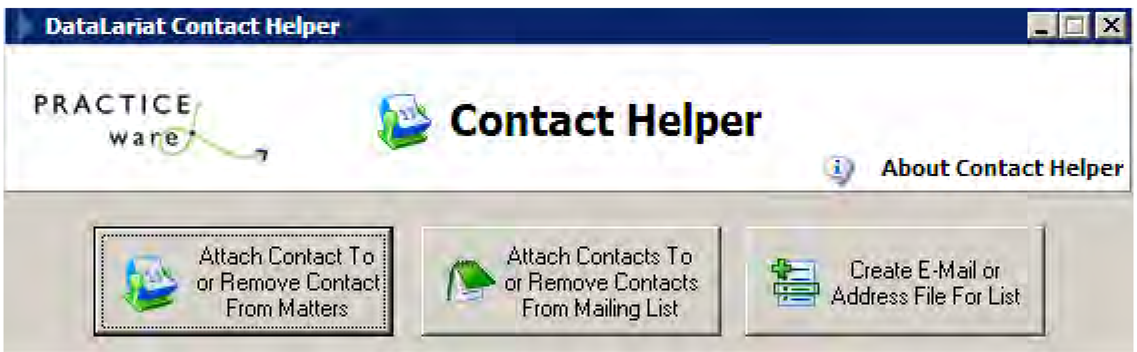


Figure 1. Interface

Matter General and Related Contacts Maintenance

This tool is useful for adding or replacing critical billing and addressee contacts on the general tab of a matter, particularly for clients who have many matters. It also allows you to both add and remove contacts from the Related Contacts tab for all or selected matters for a client. It is a good idea to review a client's matters before making the changes, although some key error prevention measures are included.

Steps to Attach or Remove Contacts from Matters:

1. Select either Attach Contact or Remove Contact.
2. Enter the name of the contact. Name means the same as using the Name option when searching in ProLaw (Or Outlook). That is, you can type a last name, a full name or any part of it (G Rendon, Gin Rendon) or part or all of a Company Name. Remember, less is more when searching. G Rendon will find Ginger J. Rendon as well as Ginger Rendon, etc., and Legal Tool is about as far as you need to go for searching for a company named Legal Toolware Incorporated.

If you type too much, you may not find the contact because you are forcing the program to match everything typed.

3. Click Search.

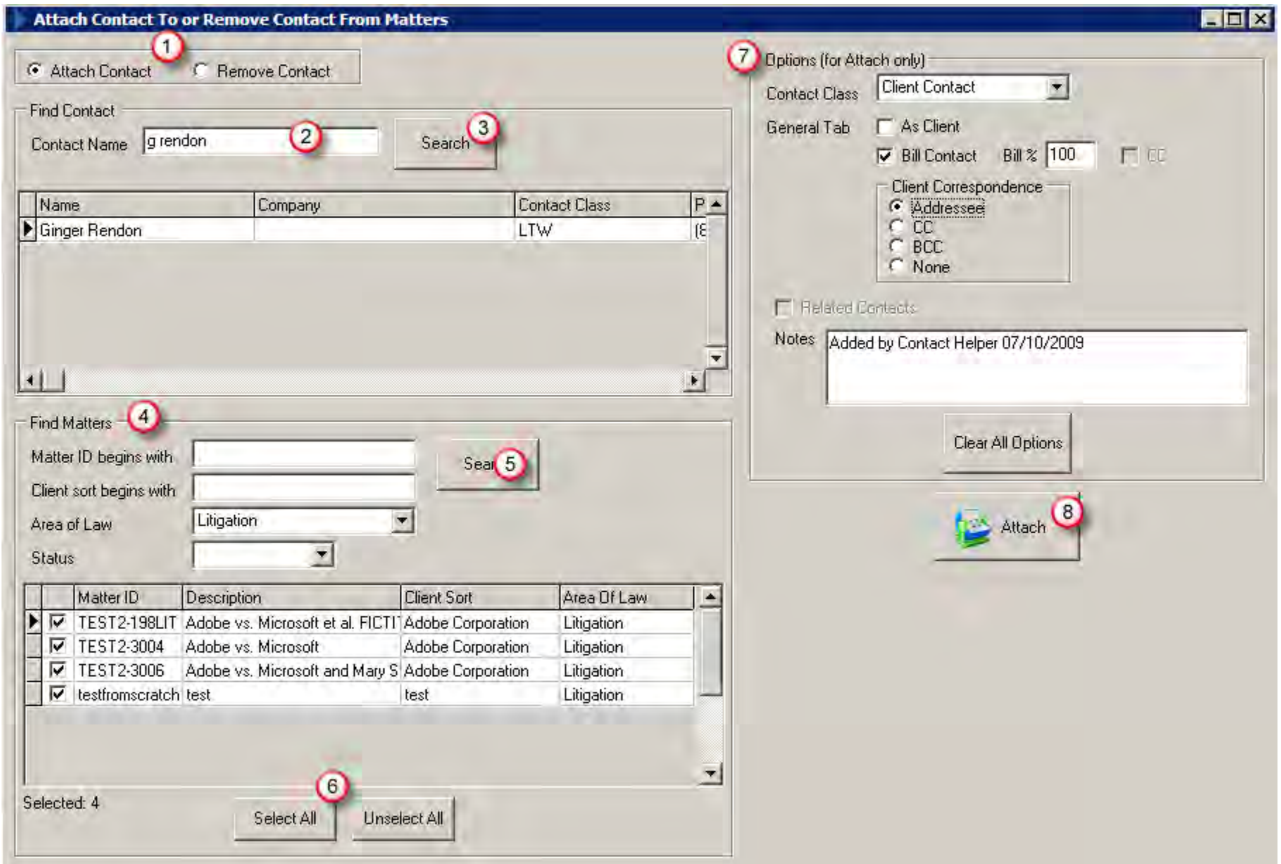


Figure 3. Attach to General Tab

4. Find Matters. Enter search criteria such as the first part of a matter id (to get all matters for the same client), part of a client sort, Area of Law, and/or Status. Area of Law and Status look at your ProLaw pick lists so all options are available on those lists. If you do not choose Area of Law or Status, all matters that fit the other criteria will be returned.
5. Click Search.
6. Select Options for the General Tab or Select Related Contacts. You must specify a Contact Class for the contact whether selecting General tab or Related Contacts Options. If you click the Bill Contact box, you must enter a billing percentage. Contact Helper will check to make sure that the total percent of bill contacts will be 100 before actually attaching a Bill Contact. (See Error Checking below.)

   When selecting Related Contacts, you need only add the Contact Class.

   Note that the program defaults to Notes that the contact was added via Contact Helper with the current date. You can delete these notes altogether or change the notes. The notes appear in the Notes field on the contact's record on either the General or Related Contacts tab.

7. Click Attach.

Error Checking:

a. Bill Percent 100: Contact Helper looks to make sure Bill Contacts do not add up to more than 100%. If adding the contact would result in contacts selected as Bill Contact totaling more than 100%, an error message returns and the program stops so you can correct the error and/or remove the offending matter. Sample error below:

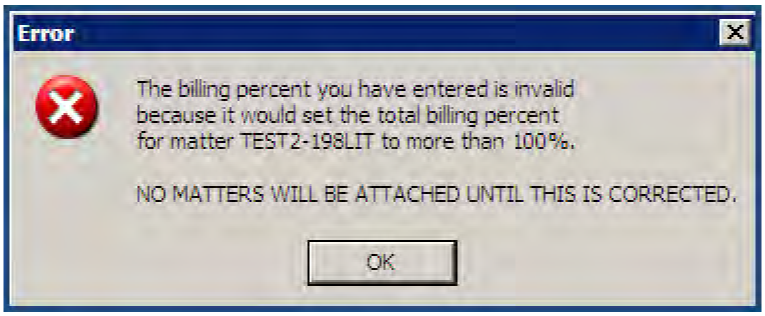


Figure 3a. Bill Contacts Will Exceed 100%

b. Duplicate Contacts : Contact Helper will not attach the same contact record more than once to the General or Related Contacts tab. If a contact record is already attached and you include them in the attach instructions, you will receive a pop up message that will allow you to "skip" attaching the contact or to remove the contact. It is always safer to remove the contact and re-attach it because this ensures that the designations for Bill Contact, Addressee or Client will be the same as the others you are adding.

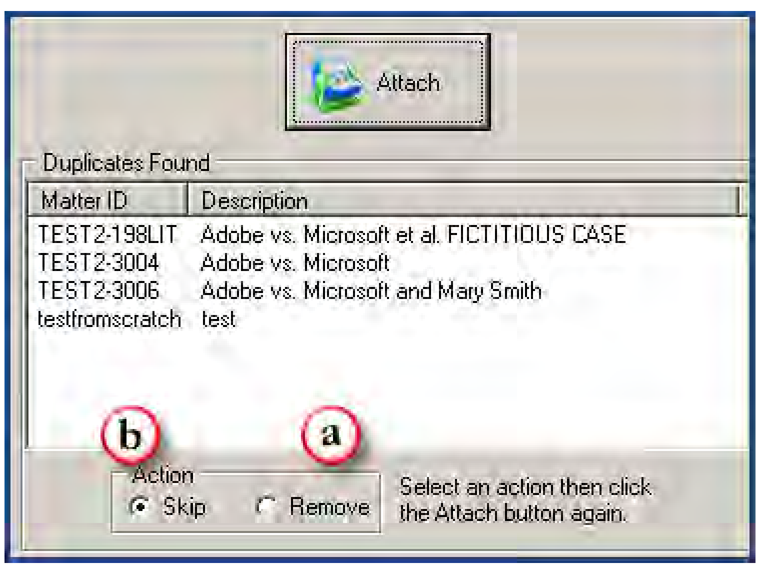
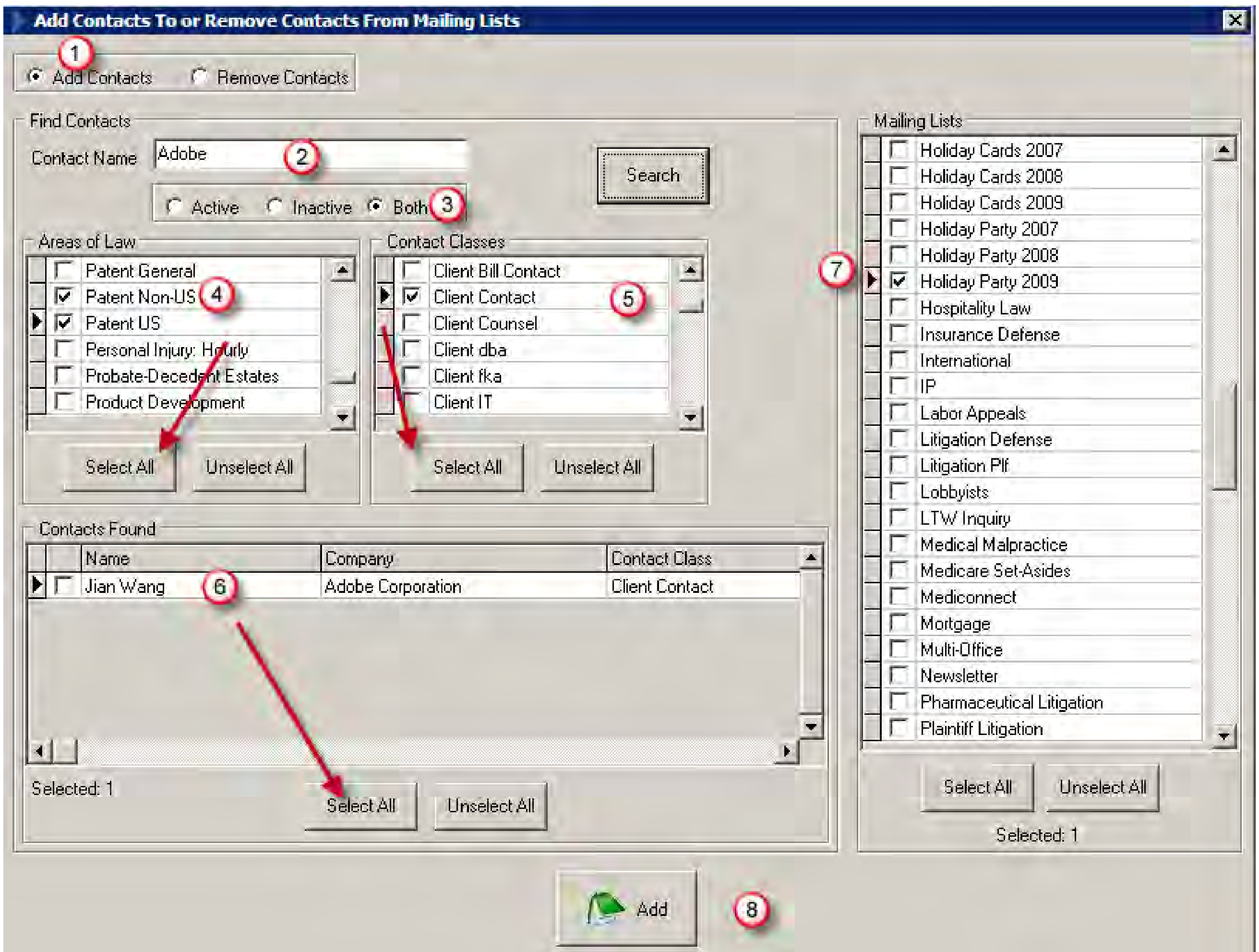


Figure 3b. Duplicates Options

To remove contacts, follow the same steps except select the Remove Button. If you change from Attach to Remove after searching, select the Search button and begin the process again.

Mailing List Maintenance

The Mailing List Maintenance tool was designed to make it easy to attach to or remove contacts from one or more lists at a time as well as to produce the lists in csv format.



Adding Contacts to Lists:

1. Select Add Contacts
2. Type the search criteria in the Contact Name field (an individual name or company)
3. Select Active/Inactive or Both

4. To include the contact only associated with matters in Prolaw (i.e., client contacts in the US Trademark area of law), select the Areas of Law to include. Skip this step to include the contact whether or not attached to any matters).
5. Select the Contact Classes to be included (i.e., to include individuals at a company with a Contact Class of Client Contact but not Bill Contact Only). Otherwise, click Select All.
6. Under Contacts Found, select those to add (or Select All to include all those that appear).
7. Click the mailing lists desired (or Select All to include on all lists).
8. Click the Add button.

Contact Helper will tell you both the number of contacts and number of lists updated.

Generating Mailing Lists for Email or Regular Mail Campaigns

This tool generates E-Mail or Name & Address lists in csv format. Three lists may be produced:

- The contacts on mailing lists who have email addresses

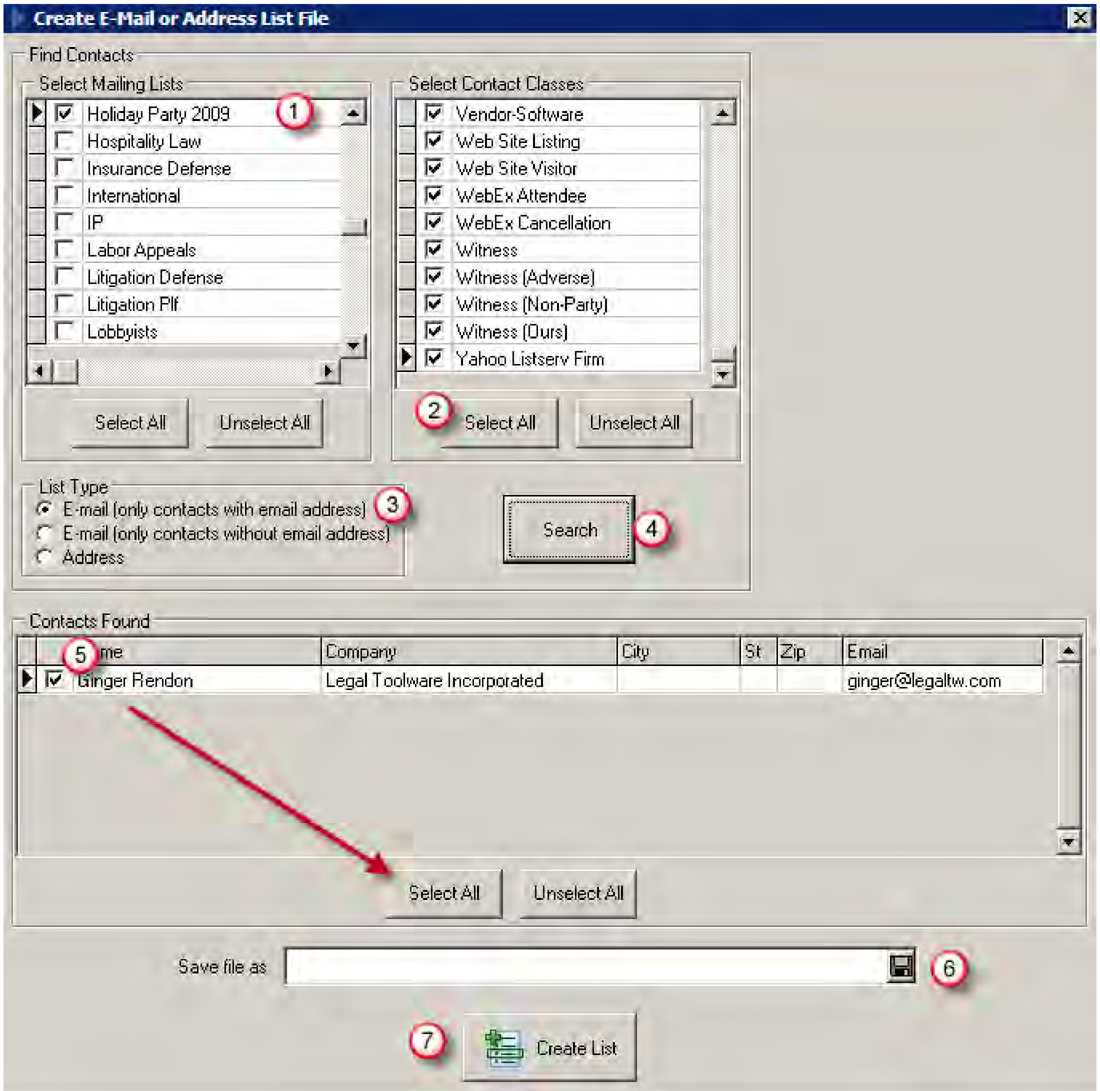
  Fields include: full name, company, email address and salutation;

- The contacts on mailing lists who do not have email addresses

  Fields include Full name, company

- A name and address list

  Fields include full name, company, full address, city, state, zip, country, and salutation.



Steps to Exporting the Lists to the CSV File:

1. Select the Contact Classes on the Mailing Lists to include (Select All would be the normal choice; however, this gives some flexibility if you wish to produce only client mailings from a list which contains vendors, judges, etc.
2. Select the List Type option will produce a list if the contacts selected have E-mail addresses in ProLaw.
3. Type a name to save the csv file. (Click on the disk to browse to a directory.)