Opening a New Case in Client Profiles for Windows (Juris Integration)
Opening a New Case (New Client)

1. From the Client Profiles Main Screen select File then Open New Case or select the sheet of paper icon from the system tool bar.

2. Select Yes, to open a new case.

3. Select the appropriate Lawtype from the list and click OK.

4. Search for the client in the existing Client Profiles database to verify that they have not been added to Client Profiles. If the client has not been added to the system select the Add New Entry button.

   Please note: If the client has already been added to Client Profiles skip down to the section named Opening a New Case (Existing Client)

5. Select the correct category for the new client.
6. Select the correct client template from the list.

Please note: When new clients are created, Client Profiles sends the client code, name, nickname, address, billing address and phone numbers over to Juris. However, the billing information is created in Juris by the use of Client Templates. These Client Templates take information that is entered under the Billing and Int/Disc tabs of existing clients in Juris and copies it over to the new clients that are being created.

7. If Client Profiles has been setup to automatically generate client numbers choose Yes in the New Client Number dialogue box.

Please note: You may also select the New Client Code button in the Details dialogue to generate a client number or you may manually enter the client number in the Client Code field.

8. Complete the Billing Name and Nickname fields.

Please note: The name you input in the Billing Name field will automatically be copied into the Nickname field.
9. Click on the Details and Other tabs and complete the remaining fields.

   Please note: The Client Template for the client can be changed by selecting the Client Template button.

10. Click OK when finished.

11. The New Case Information screen now displays showing the new client name, address, phone numbers that have been entered along with a Matter Information tab.

12. Select the correct category that will be assigned to this party on the case from the drop down list next to the client code.

13. Either select the Matter Information Tab or select the Next button.
14. The Matter Number field will automatically be filled in if the Lawtype is set for automatic numbering.

   Please note: If the Matter Number field is not automatically generated it should be entered with the new client number and a ‘-’ and the first consecutive matter number. For example, the second matter for client 8353 would be entered as 8353-0002.

15. Enter the name of the case in the Style field.

16. Under the Case Staff section select the Category that has been mapped to the Juris Billing Attorney and Originating Attorney and assign the appropriate person to each of these roles.

17. Under the Pick List Selections section select the correct Case Type that will map over to the Practice Class in Juris.

18. Fill in any other applicable information and select Finish.

   Please note: The case will automatically pull up in Client Profiles if the “Retrieve Case when Finished” checkbox is checked.
Opening a New Case (Existing Client)

1. From the Client Profiles Main Screen select File then Open New Case or select the sheet of paper icon from the system tool bar.

2. Select Yes, to open a new case.

3. Select the appropriate Lawtype from the list and click OK.

4. Search for the client in the existing Client Profiles database to verify that they have been added to Client Profiles. If the client has been added to the system select the Select button.

*Please note: If the client has not already been added to Client Profiles skip down to the section named Opening a New Case (New Client)*
5. The New Case Information screen now displays showing the new client name, address, phone numbers that have been entered along with a Matter Information tab.

6. Select the correct category that will be assigned to this party on the case from the drop down list next to the client code.

7. Either select the Matter Information Tab or select the Next button.

8. The Matter Number field will automatically be filled in if the Lawtype is set for automatic numbering.

   Please note: If the Matter Number field is not automatically generated it should be entered with the new client number and a ‘-’ and the first consecutive matter number. For example, the second matter for client 8353 would be entered as 8353-0002.

9. Enter the name of the case in the Style field.
10. Under the Case Staff section select the Category that has been mapped to the Juris Billing Attorney and Originating Attorney and assign the appropriate person to each of these roles.

11. Under the Pick List Selections section select the correct Case Type that will map over to the Practice Class in Juris.

12. Fill in any other applicable information and select Finish.

Please note: The case will automatically pull up in Client Profiles if the “Retrieve Case when Finished” checkbox is checked.
Troubleshooting Tips

Tip# 1

There is an error entering data while setting up a new case and the case does not go to Juris.

1. Open the case inside of Client Profiles and go to the General Info screen.

2. Correct the data and select the save icon.

3. You will then see a box pop up sending the case over to Juris.
Tip# 2

An existing client card in Client Profiles does not show up in the Client table in Juris.

1. Inside of Client Profiles, go to Desktop\Card File and search for the client.
2. Select the View button to get to the Details box shown above.
3. Select the Client checkbox in the upper right hand corner of the Details box.
4. Select the Client Template from the list.
5. If Client Profiles has been setup to automatically generate client numbers select the New Client Code button or you may enter the client number manually.

6. Complete the Billing Name and Nickname fields.

   *Please note: The name you input in the Billing Name field will automatically be copied into the Nickname field.*

7. Click OK.
Tip# 3

The client selected for that case is either the incorrect client or has not been sent over to Juris.

1. If the client selected is incorrect, select the Change Client button and choose the correct client.

2. If the client selected is correct, select the Client Details button.
3. Select the Client checkbox in the upper right hand corner of the Details box.

4. Select the Client Template from the list.
5. If Client Profiles has been setup to automatically generate client numbers select the New Client Code button or you may enter the client number manually.

6. Complete the Billing Name and Nickname fields.

   *Please note: The name you input in the Billing Name field will automatically be copied into the Nickname field.*

7. Click OK.