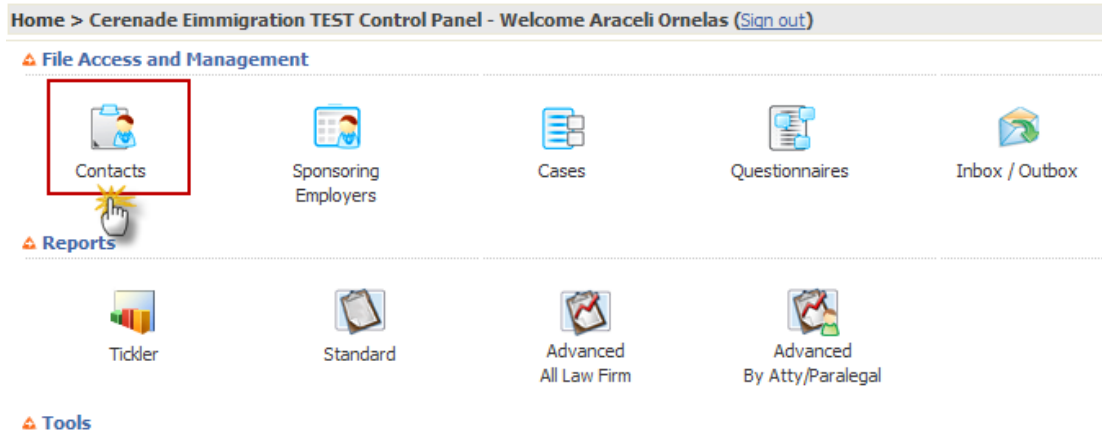


HOW TO SEARCH FOR CLIENTS

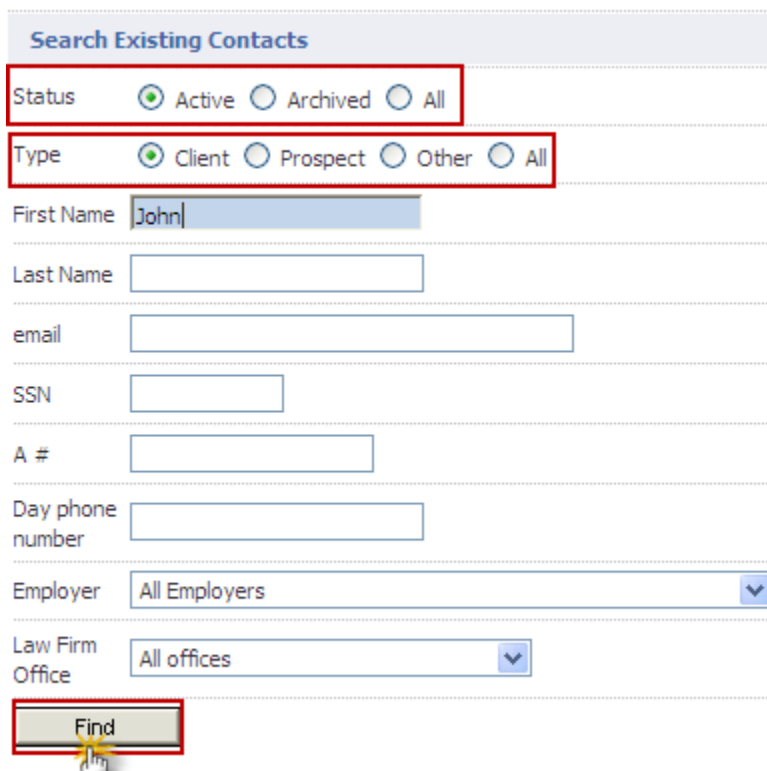
1) Go to **Home** then click on **Contacts**.



2) In the **Status** you can select to search among **Active**, **Archived** or **All** clients. In the **Type** you can select to narrow your search by the type of client: **Client**, **Prospect**, **Other** or **All**. Type data into First Name, Last Name, email, SSN... fields. To start the search, click on **Find** button.

Note: You can use the wild character (%) to perform partial search on names, SSN, and other fields.

For Example: %olly in the First Name will return any client whose first name is “Holly”, “Molly” and “Jolly”.



Search Existing Contacts

Status Active Archived All

Type Client Prospect Other All

First Name

Last Name

email

SSN

A #

Day phone number

Employer

Law Firm Office

Find



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