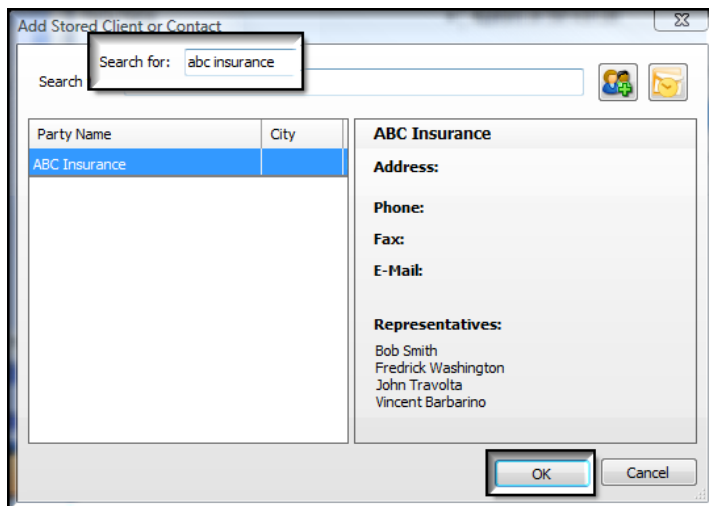
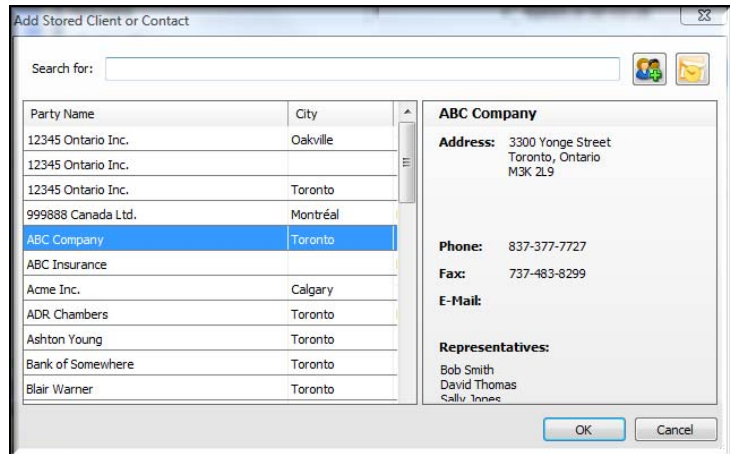


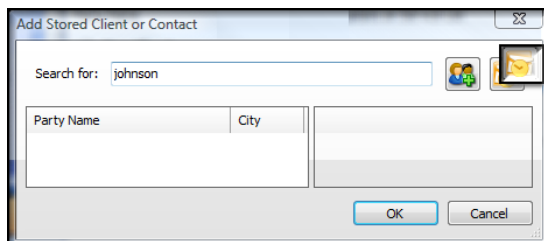
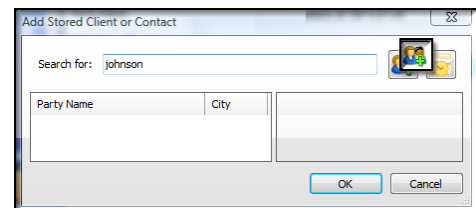
To avoid duplicate clients or contacts in the **Stored Client and Contact List**, check to see if the Client or Contact already exists in the List. Begin by typing the party name in the **Search for:** field.



If the client or contact has been previously stored, the name will appear in the list. Highlight the name and press **OK**.

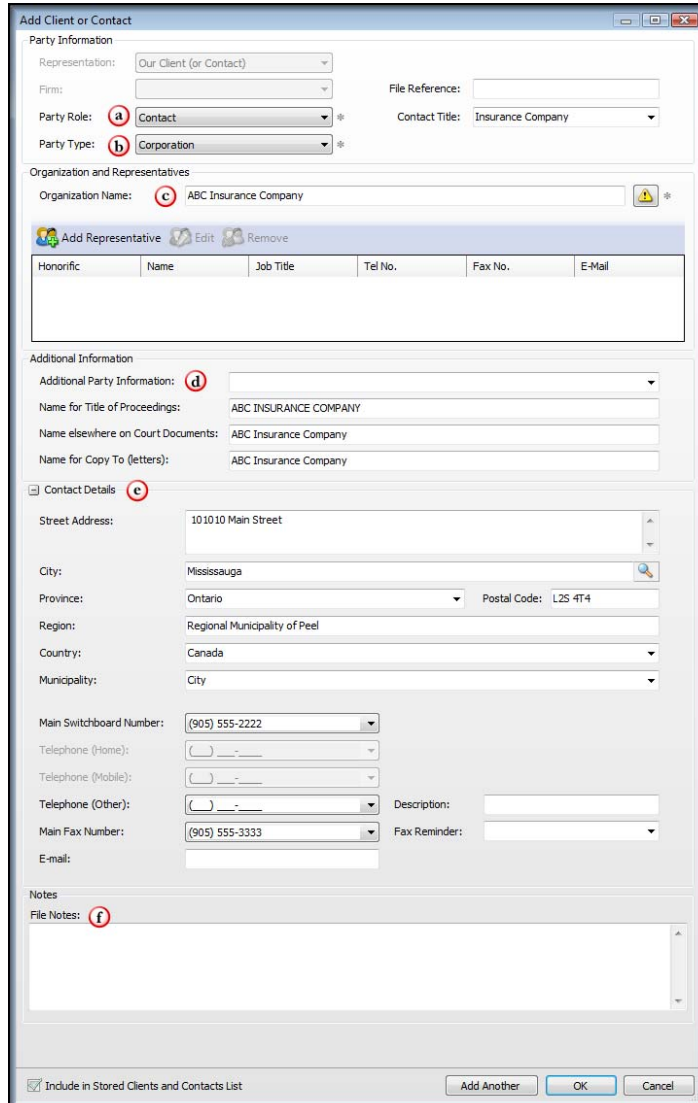
A new **Add Client or Contact** dialog will open where the **Party Role** can be completed and the information verified.

If the party does not appear in the List, select the **Add Client or Contact** icon.



Clients can also be added by selecting the **Import From Outlook** icon.

Complete the party information dialog.



Party Information

Representation: Our Client (or Contact) | Firm: | File Reference: | Party Role: **a** Contact | Contact Title: Insurance Company | Party Type: **b** Corporation

Organization and Representatives

Organization Name: **c** ABC Insurance Company

Honorific	Name	Job Title	Tel No.	Fax No.	E-Mail
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Additional Information

Additional Party Information: **d** | Name for Title of Proceedings: ABC INSURANCE COMPANY | Name elsewhere on Court Documents: ABC Insurance Company | Name for Copy To (letters): ABC Insurance Company

Contact Details **e**

Street Address: 101010 Main Street | City: Mississauga | Province: Ontario | Postal Code: L2S 4T4 | Region: Regional Municipality of Peel | Country: Canada | Municipality: City

Main Switchboard Number: (905) 555-2222 | Telephone (Home): | Telephone (Mobile): | Telephone (Other): | Description: | Main Fax Number: (905) 555-3333 | Fax Reminder: | E-mail:

Notes

File Notes: **f**

Include in Stored Clients and Contacts List | Add Another | OK | Cancel

- a** Party Role
- b** Party Type
- c** Organization Name
- d** Additional Information
- e** Contact Details
- f** File Notes