

Whats This?

You can use this screen to create a new case file. 1. Create a case by adding a title and an optional summary. 2. Select a category and a status for the case. 3. Select an access level. Access level determines which of your employees are able to view or modify the details of the case. Access level are as described below Read Only - Users/Employees with this access level are only able to view cases that are designated as Read Only. This users can not modify/add content to the case. Use this option if you want this case to be viewed by all employees. General Users - These users are able to view and modify cases with access levels Read Only, and General Users.

Case

Case Person

First Name* Alvin	Last Name* Jones
Relationship* Defendant	Phone Number
Email	Address Name Alvin D Jones
Address Line1 2424 92Nd St	Address Line2
City East Elmhurst	State NY
	ZipCode 11369-1121

scroll down



Case Details

11369-1121

Case Details

Title* Alvin Jones	Category* Traffic
Access Level* Everyone	Status* Prospective Client
Case Memo	
Tags	

Payments


CREATE INVOICE ADD CREDIT ADD SCHEDULEPAYMENT

click when finished

SAVE CLEAR CANCEL



Welcome JOHN SMITH Available Credits : 0.00 Compose Fax



ALVIN JONES (Traffic)

John Smith Jul 26, 2017 12:26 PM

Prospective Client [\(Edit Case Details\)](#)

[Add Tag](#)

[Add Attorney](#)

Contacts

Charges

Events

Memo & Files

Payments


Hours

Activities

Contacts List + New

ALVIN JONES <small>Defendant</small> ALVIN D JONES 2424 92ND ST, EAST ELMHURST, NY,11369-1121.	Add Address Edit Delete
BLOOMFIELD TOWN MUNICIPAL PLAZA, BLOOMFIELD, NJ, 07003. 9:00 AM - 4:00 PM 973-680-4078	Add Address Edit Delete

Welcome JOHN SMITH Available Credits : 0.00 Compose Fax Log out



Today

Search

Add Case

My Contacts 2

My Cases 2

Leads +

Reports

Events

Settings

All Contacts 4

Tr Traffic 4

Show All

Search

SEARCH

My Contacts List 4 First Last Name Today & Yesterday + New

ALVIN JONES Jul 26,2017 16:07 PM	Case(s) : 1 Address(s) : 1
BLOOMFIELD TOWN Jul 26,2017 16:07 PM	Case(s) : 1 No Address Added Yet

cases are added into contacts

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