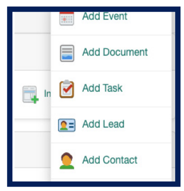
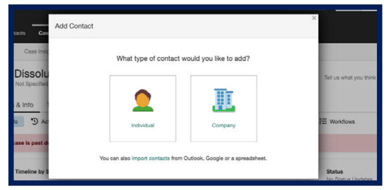
Setting up a Client Profile

This is just a quick instructional guide on setting up a profile. Every case has assigned profiles to it, one of which of course will be our client's. We want to make sure the profiles are filed with the right details & that we can approach every profile and find the same things. Follow the steps below to see how to keep that process ticking along! You can also watch this guide here: *joneslawcolorado.com/dashboard*

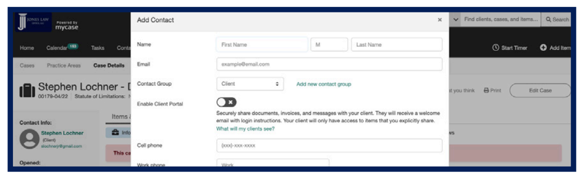
Steps to Follow

- Click add item and add contact. You'll want to click individual - companies require far less detail.

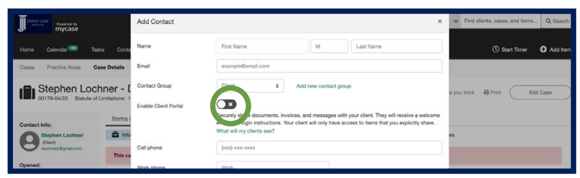




- In the profile creator you'll want to add a cell, email, address, and any notes specific to the client.



- You can also enable the client portal from here which is needed to share documents & invoices.



- Quick note: When adding notes to a client profile remember that they should be client and not case specific

- That's that! Good job!

Concluding Thoughts

Important things to consider - client profiles should always be for just one person. There are two categories of data we can collect with forms, case data and contact data. If a contact is set up incorrectly as two people the contact data will not apply equally to both. Add multiple contacts to cases, don't try and add multiple people to one contact! It's also helpful to consider that every contact we add needs