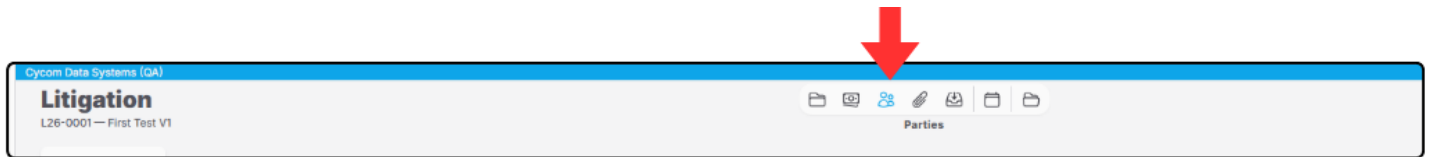


Parties, Witnesses, Contacts, and Captions are managed in the Parties view of a matter. The Parties view is not available for all modules, but when available it is accessed from the Module Toolbar using the Parties icon.

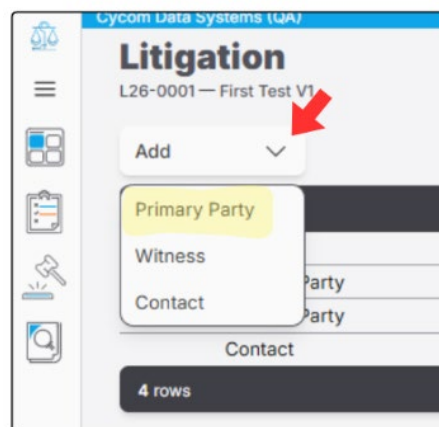


Contents:

- Add Primary Party
- Add a Witness
- Add a Contact
- Add Related Party
- Create New Party Profile (when they are not in the system)
- Edit Any Party
- Edit Profile of Any Party
- Add or Edit Remarks for Any Party
- Remove Any Party

Add Primary Party

To add a new primary party to a matter, select **Add** on the top left side of the **Parties** view. From the drop-down, select **Primary Party**.



An **Add Primary Party** dialogue will open.



Add Primary Party

Last Name

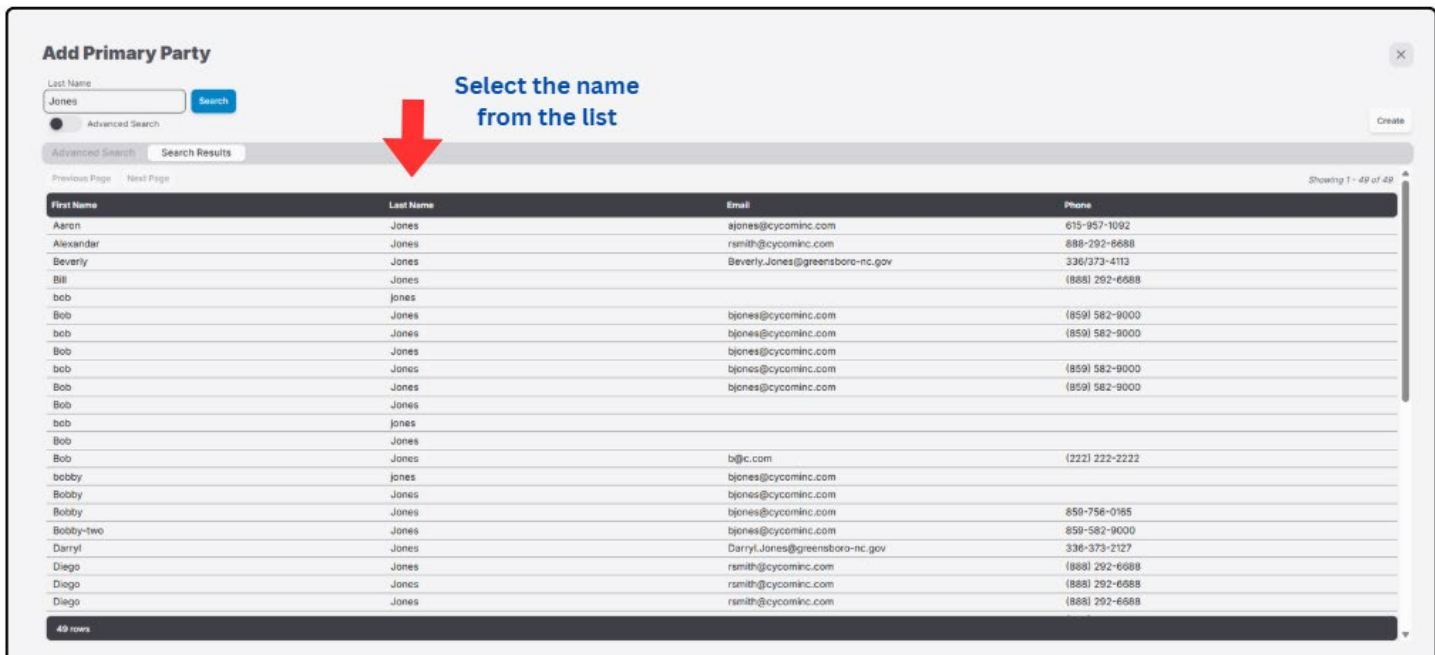
☒ Advanced Search

Advanced Search Search Results

Previous Page Next Page No results.

First Name	Last Name	Email	Phone
0 rows			

Enter the **name of the Primary Party** in the search field and click the blue **Search** button. A list of names will appear below. Click the name of the Primary Party you wish to add.



Add Primary Party

Last Name

☒ Advanced Search

Advanced Search Search Results

Previous Page Next Page Showing 1 - 49 of 49

First Name	Last Name	Email	Phone
Aaron	Jones	ajones@cycominc.com	615-957-1092
Alexandar	Jones	rsmith@cycominc.com	888-292-6688
Beverly	Jones	Beverly.Jones@greensboro-nc.gov	336/373-4113
Bill	Jones		(888) 292-6688
beb	Jones		
Bob	Jones	bjones@cycominc.com	(859) 582-9000
beb	Jones	bjones@cycominc.com	(859) 582-9000
Bob	Jones	bjones@cycominc.com	
beb	Jones	bjones@cycominc.com	(859) 582-9000
Bob	Jones	bjones@cycominc.com	(859) 582-9000
beb	Jones		
Bob	Jones		
Bob	Jones	bj@c.com	(222) 222-2222
bobby	Jones	bjones@cycominc.com	
Bobby	Jones	bjones@cycominc.com	
Bobby	Jones	bjones@cycominc.com	859-756-0165
Bobby-two	Jones	bjones@cycominc.com	859-582-9000
Darryl	Jones	Darryl.Jones@greensboro-nc.gov	336-373-2127
Diego	Jones	rsmith@cycominc.com	(888) 292-6688
Diego	Jones	rsmith@cycominc.com	(888) 292-6688
Diego	Jones	rsmith@cycominc.com	(888) 292-6688

49 rows

Add Primary Party

1 Search

Last Name

Search

Advanced Search

Search Results

Previous Page

Next Page

First Name	Last Name	Email	Phone
Aaron	Jones	ajones@cycominc.com	615-957-1092
Alexandar	Jones	rsmith@cycominc.com	888-292-6688
Beverly	Jones	Beverly_Jones@greentboro-nc.gov	336/373-4113
Bill	Jones		(888) 292-6688
	jones		
	Jones	bjones@cycominc.com	(859) 582-9000
	Jones	bjones@cycominc.com	(859) 582-9000
Bob	Jones	bjones@cycominc.com	
bcb	Jones	bjones@cycominc.com	(859) 582-9000
Bob	Jones	bjones@cycominc.com	(859) 582-9000
Bob	Jones		
bcb	Jones		
Bob	Jones		
Bob	Jones	b@c.com	(222) 222-2222
bcbby	Jones	bjones@cycominc.com	
Bobby	Jones	bjones@cycominc.com	
Bobby	Jones	bjones@cycominc.com	859-756-0165
Bobby-two	Jones	bjones@cycominc.com	859-582-9000
Darryl	Jones	Darryl.Jones@greentboro-nc.gov	336-373-2127
Diego	Jones	rsmith@cycominc.com	(888) 292-6688
Diego	Jones	rsmith@cycominc.com	(888) 292-6688
Diego	Jones	rsmith@cycominc.com	(888) 292-6688

49 rows 1 selected X

Add to Master

Role

Bill Jones

Title Jones, Bill

Phone 1 (888) 292-6688

Address 100 Main Street
Madison, WI 53703

☐ Served

Created 6/1/2020

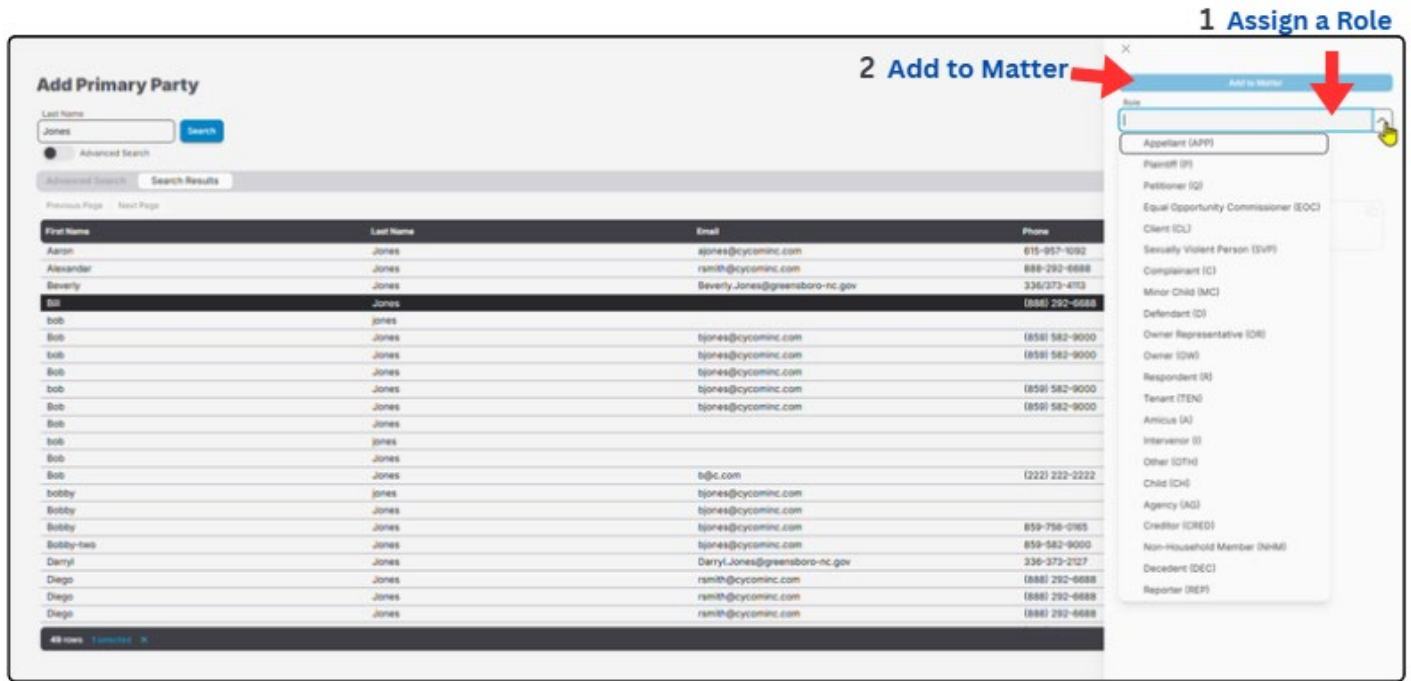
Last Updated 6/1/2020

☐ Incorporated

Assign a Role to the **Primary Party** from the drop-down selection, then click the blue **Add to Matter** button.

1 Assign a Role

2 Add to Matter



Add Primary Party

Last Name:

Advanced Search

Previous Page Next Page

First Name	Last Name	Email	Phone
Aaron	Jones	ajones@cycominc.com	615-957-1092
Alexandar	Jones	rsmith@cycominc.com	888-292-6688
Beverly	Jones	Beverly.Jones@greensboro-nc.gov	336-373-4703
Bill	Jones		(888) 292-6688
bob	jones		
Bob	Jones	bjones@cycominc.com	(858) 582-9000
Bob	Jones	bjones@cycominc.com	(858) 582-9000
Bob	Jones	bjones@cycominc.com	
Bob	Jones	bjones@cycominc.com	(858) 582-9000
Bob	Jones	bjones@cycominc.com	(858) 582-9000
Bob	Jones		
Bob	Jones		
Bob	Jones		
Bob	Jones		
Bob	Jones	bj@c.com	(222) 222-2222
bobbiy	jones	bjones@cycominc.com	
Bobby	Jones	bjones@cycominc.com	
Bobby	Jones	bjones@cycominc.com	
Bobby-two	Jones	bjones@cycominc.com	859-756-0165
Darryl	Jones	Darryl.Jones@greensboro-nc.gov	336-373-2127
Diego	Jones	rsmith@cycominc.com	(888) 292-6688
Diego	Jones	rsmith@cycominc.com	(888) 292-6688
Diego	Jones	rsmith@cycominc.com	(888) 292-6688

48 rows

Role

- Appellant (APP)
- Plaintiff (P)
- Petitioner (Q)
- Equal Opportunity Commissioner (EOC)
- Client (CL)
- Sexually Violent Person (SVVP)
- Complainant (C)
- Minor Child (MC)
- Defendant (D)
- Owner Representative (OR)
- Owner (OW)
- Respondent (R)
- Tenant (TEN)
- Amicus (A)
- Intervenor (I)
- Other (OTH)
- Child (CH)
- Agency (AG)
- Creditor (CRED)
- Non-Household Member (NHM)
- Decedent (DEC)
- Reporter (REP)

The selected **Primary Party** will appear in the list of **Parties**.

Litigation

L28-0001 — First Test V1

Parties

Add

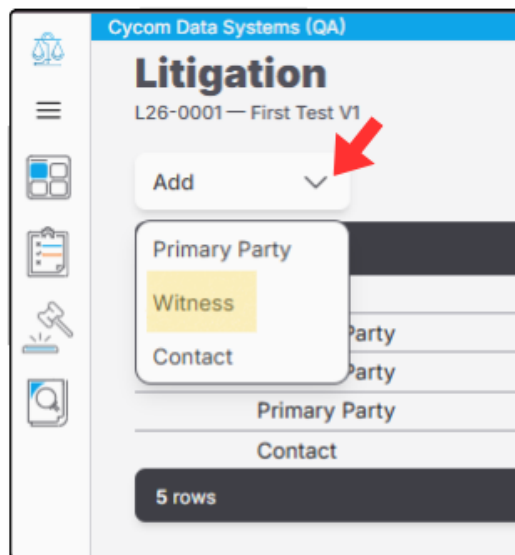
Type	Name	Role	Email	Phone
Witness	Jones, Jo	Other Witness		
Primary Party	Woods, Ricardo	Other		
Primary Party	Smith, Bo	Plaintiff		
Primary Party	Jones, Bill	Plaintiff		(888) 292-6688
Contact	Finch, Atticus		AFinch@Mockingbird.law.com	205-555-5151

5 rows

Add A Witness

To add a new **Witness**, follow the same steps as in Primary Party. Click **Add** then select **Witness**. The **Add Witness** dialogue will open.

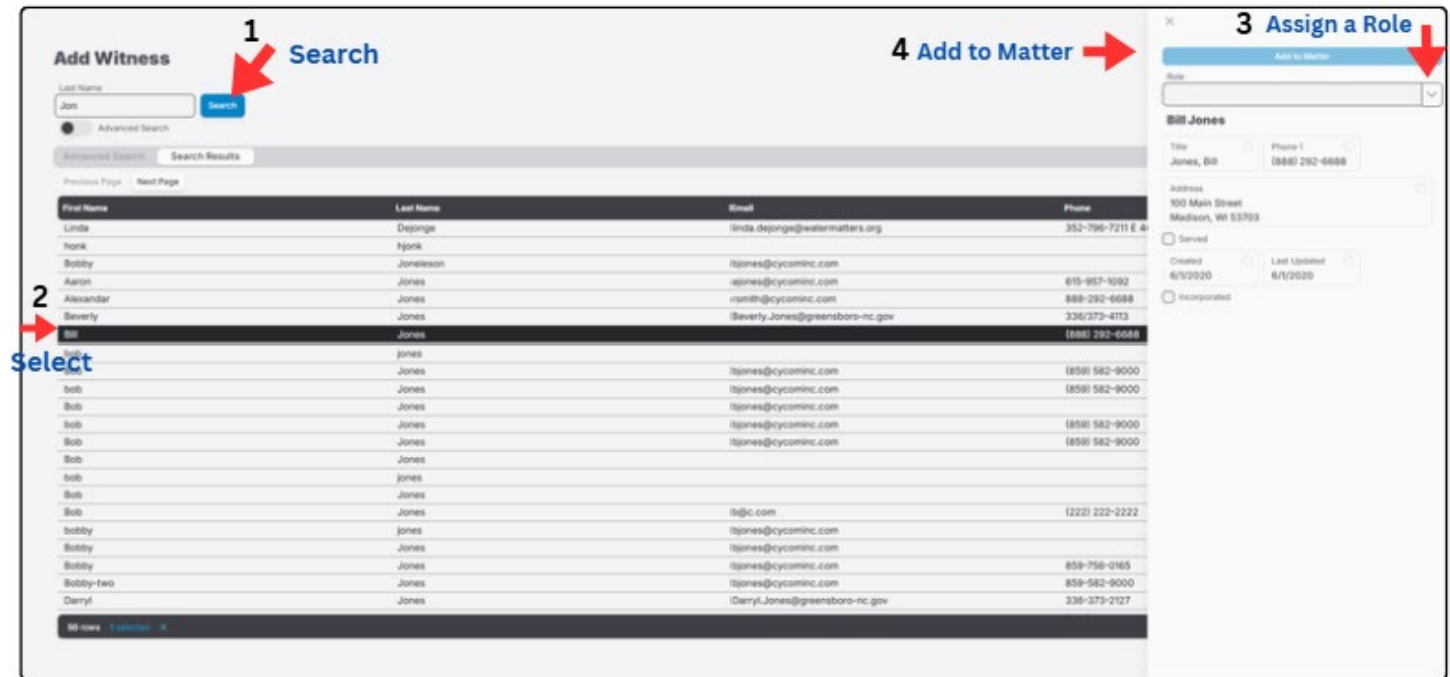
To Add a Witness.



Search For the Witness then Select it from the list, a card will open to the right.



Assign a Role then Add to Matter.



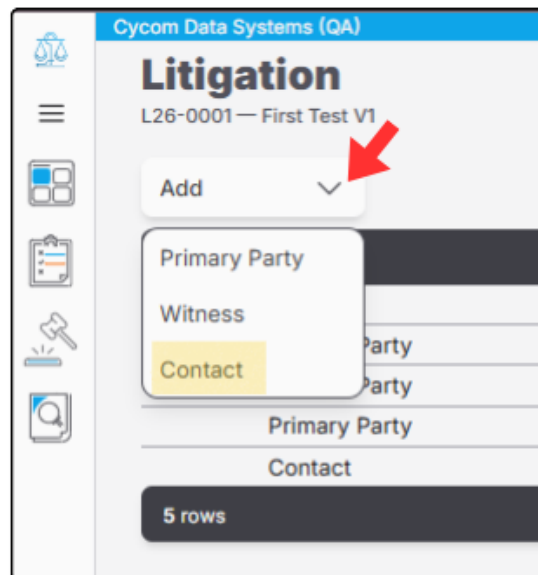
The screenshot illustrates the process of adding a witness and assigning a role. On the left, the 'Add Witness' search results table lists various individuals. A red arrow labeled '1' points to the 'Search' button, and a red arrow labeled '2' points to the 'Select' button. On the right, the 'Assign a Role' dialog for 'Bill Jones' is shown, with a red arrow labeled '3' pointing to the 'Add to Matter' button. A red arrow labeled '4' points to the 'Add to Matter' button in the top right corner of the search results table.

First Name	Last Name	Email	Phone
Linda	Dejonge	linda.dejonge@watermatters.org	352-796-7211 E 4
hank	hjkank		
Bobby	Joneson	bjones@cycominc.com	
Aaron	Jones	ajones@cycominc.com	615-957-1092
Alexandar	Jones	asmith@cycominc.com	888-292-6688
Severly	Jones	severly.jones@greensboro-nc.gov	336-373-4153
Bill	Jones		(888) 292-6688
jones	jones		
jones	jones	bjones@cycominc.com	(859) 582-9000
bob	Jones	bjones@cycominc.com	(859) 582-9000
Bob	Jones	bjones@cycominc.com	(859) 582-9000
Bob	Jones	bjones@cycominc.com	(859) 582-9000
Bob	Jones	bjones@cycominc.com	(859) 582-9000
Bob	Jones		
Bob	Jones		
Bob	Jones	bj@ic.com	(222) 222-2222
bobby	Jones	bjones@cycominc.com	
Bobby	Jones	bjones@cycominc.com	
Bobby	Jones	bjones@cycominc.com	859-756-0165
Bobby-two	Jones	bjones@cycominc.com	859-582-9000
Darryl	Jones	Darryl.Jones@greensboro-nc.gov	336-373-2127

Add A Contact

To add a new **Contact**, follow the same steps as in Primary Party. Click **Add** then select Contact. The **Add Contact** dialogue will open.

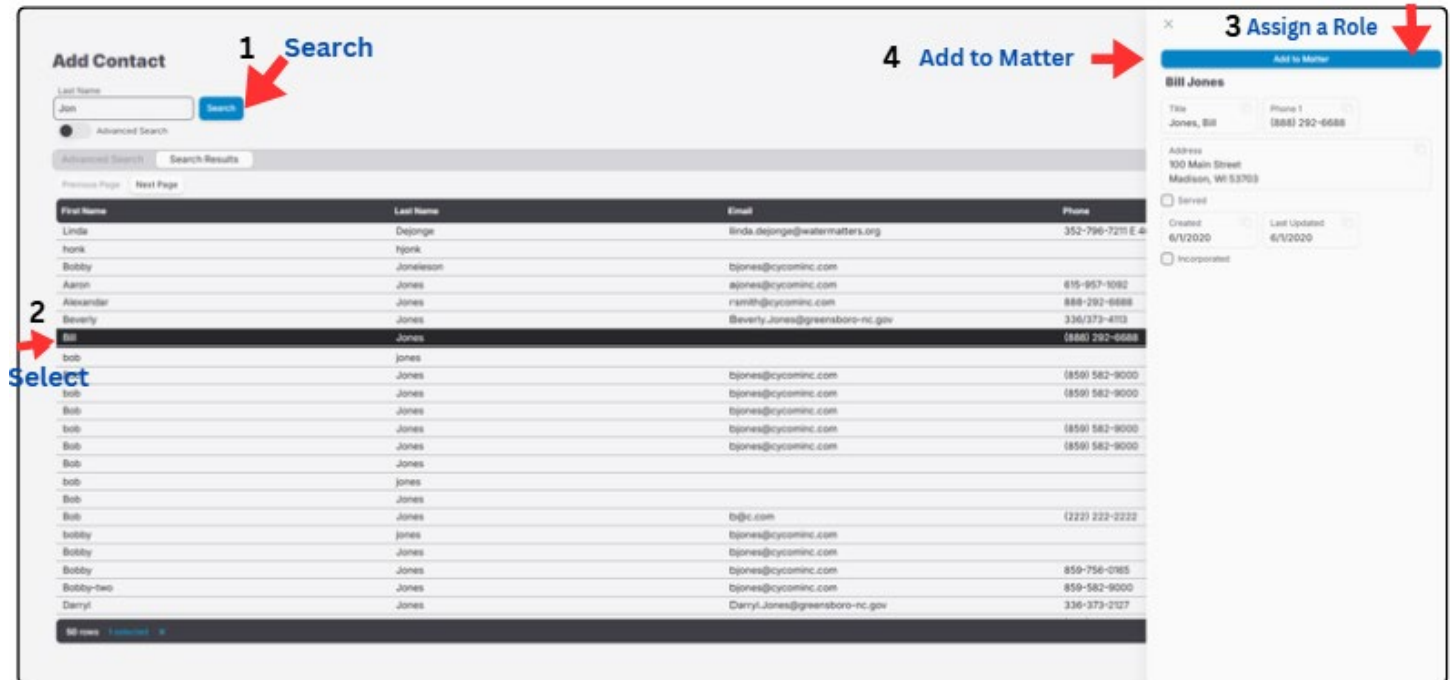
To Add a Contact.



Search For the Contact.



A card/panel will open to the right. Next **select** the name. **Assign a Role** then **Add to Matter**. The contact will appear in the list of parties.



The screenshot shows the 'Add Contact' interface. Step 1 points to the 'Search' button. Step 2 points to the 'Select' annotation next to the 'Bill' row in the search results table. Step 3 points to the 'Assign a Role' button in the right-hand panel. Step 4 points to the 'Add to Matter' button in the right-hand panel.

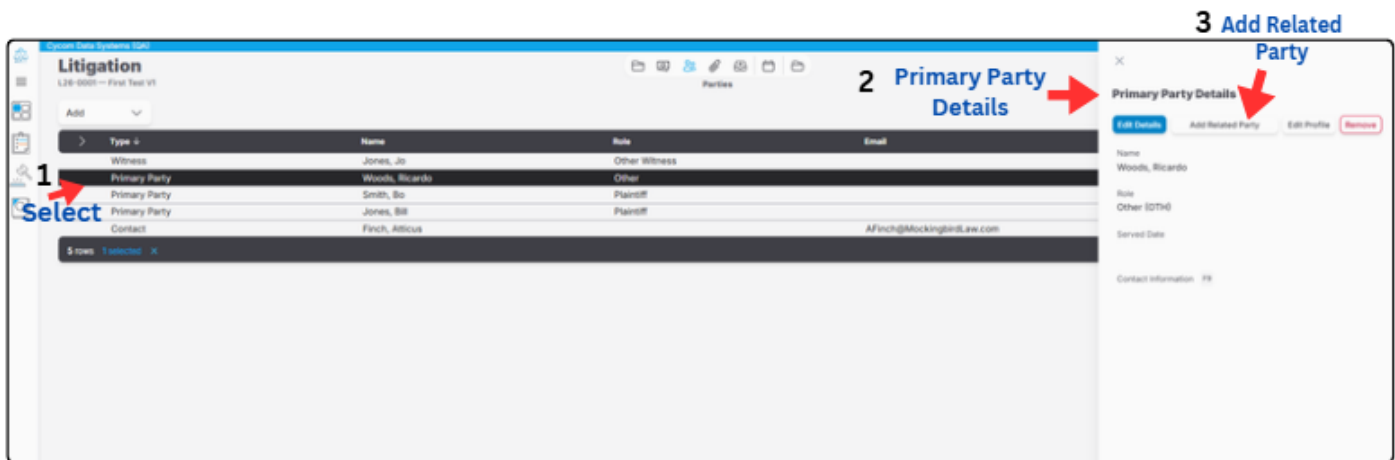
Search Results Table:

First Name	Last Name	Email	Phone
Linda	Dejonge	linda.dejonge@watermatters.org	352-796-7211 E 4
hank	hank		
Bobby	Jones	bjones@cycominc.com	
Aaron	Jones	ajones@cycominc.com	615-957-1062
Alexander	Jones	ramth@cycominc.com	888-292-6688
Beverly	Jones	Beverly.Jones@greensboro-nc.gov	336/373-4713
Bill	Jones		(888) 292-6688
bob	Jones		
Bob	Jones	bjones@cycominc.com	(850) 582-9000
Bob	Jones	bjones@cycominc.com	(850) 582-9000
Bob	Jones	bjones@cycominc.com	(850) 582-9000
Bob	Jones	bjones@cycominc.com	(850) 582-9000
Bob	Jones	bjones@cycominc.com	(850) 582-9000
Bob	Jones		
Bob	Jones		
Bob	Jones	bj@ic.com	(222) 222-2222
bobby	Jones	bjones@cycominc.com	
Bobby	Jones	bjones@cycominc.com	
Bobby	Jones	bjones@cycominc.com	850-756-0765
Bobby-two	Jones	bjones@cycominc.com	850-582-9000
Darryl	Jones	Darryl.Jones@greensboro-nc.gov	336-373-2127

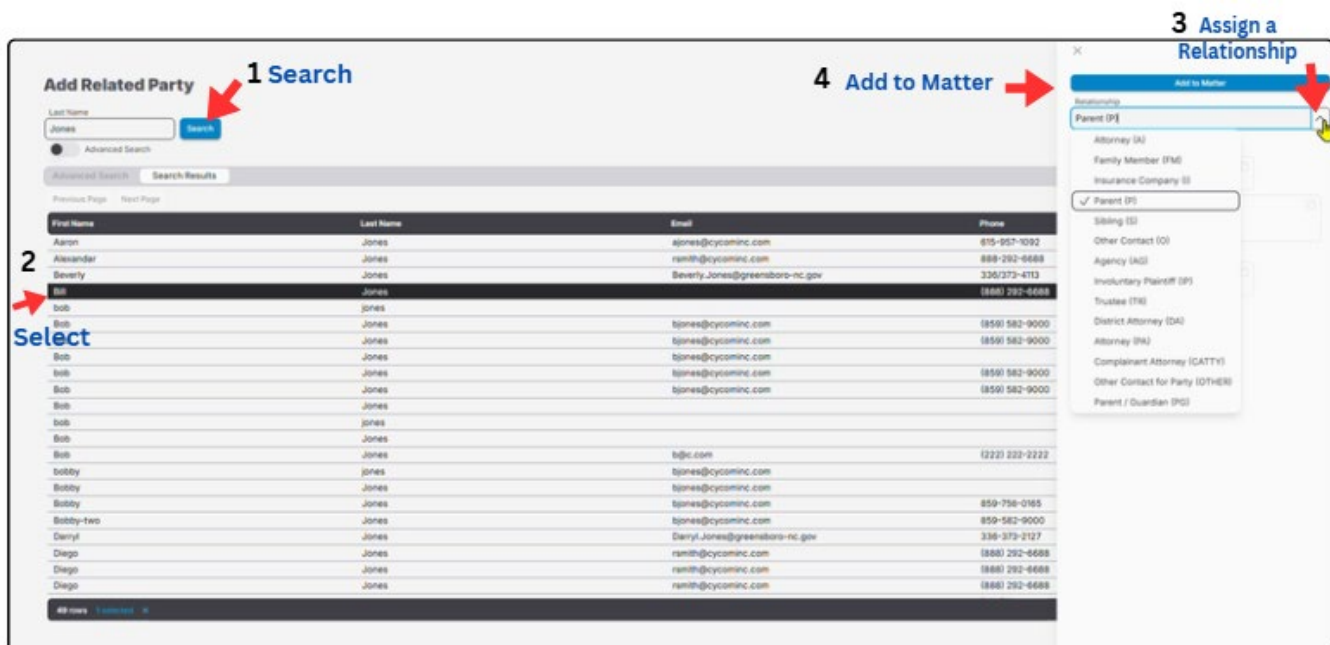
Right Panel (Bill Jones):

- Title: Jones, Bill
- Phone 1: (888) 292-6688
- Address: 100 Main Street, Madison, WI 53703
- Created: 6/1/2020
- Last Updated: 6/1/2020
- Buttons: ☐ Served, ☐ Incorporated

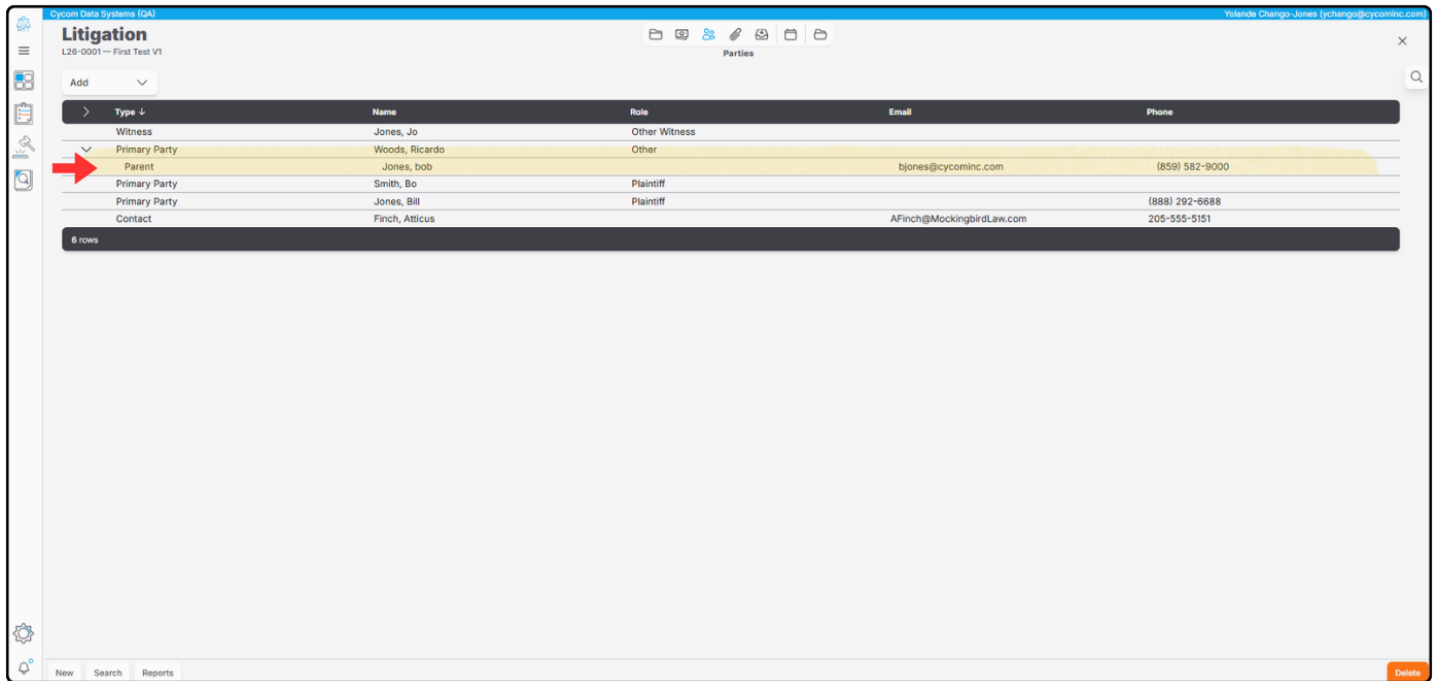
To add a **Related Party**, first **select the Primary Party** it is connected to, so that it appears highlighted. A **Primary Party Details** card will open to the right of the screen. Next, select the **Add Related Party** button in the center.



An **Add Related Party** dialogue will open. Search for the related party individual. **Select** the name from the list. A card will open to the right. Next, **assign a relationship** from the drop-down selection, then **add to the matter**.



Once the **Related Party** is added to the matter, it **will appear in a drop-down** under the **primary party** it is related to.



Type	Name	Role	Email	Phone
Witness	Jones, Jo	Other Witness		
Primary Party	Woods, Ricardo	Other		
Parent	Jones, bob		bjones@cycominc.com	(859) 582-9000
Primary Party	Smith, Bo	Plaintiff		
Primary Party	Jones, Bill	Plaintiff		(888) 292-6688
Contact	Finch, Atticus		AFinch@MockingbirdLaw.com	205-555-5151

6 rows

Create New Party Profile

When **any party** you are searching for is **not in the system**, a **No Results** will appear on the right. If you need to create a profile for that individual, click on the **Create** button on the far right of the screen.



Add Primary Party

Last Name: Yol Search 1

Advanced Search

Advanced Search Search Results

Previous Page Next Page

First Name	Last Name	Email	Phone
0 rows			

Create 3

No results 2

The **Create Profile** dialogue will open. Enter all relevant information. It is best practice to be as thorough as possible. Once the data is entered click **Save**. Now the individual will show up in searches.

Create Profile After entering the relevant information click Save or Cancel or Exit to return to previous screen

Save **Cancel**

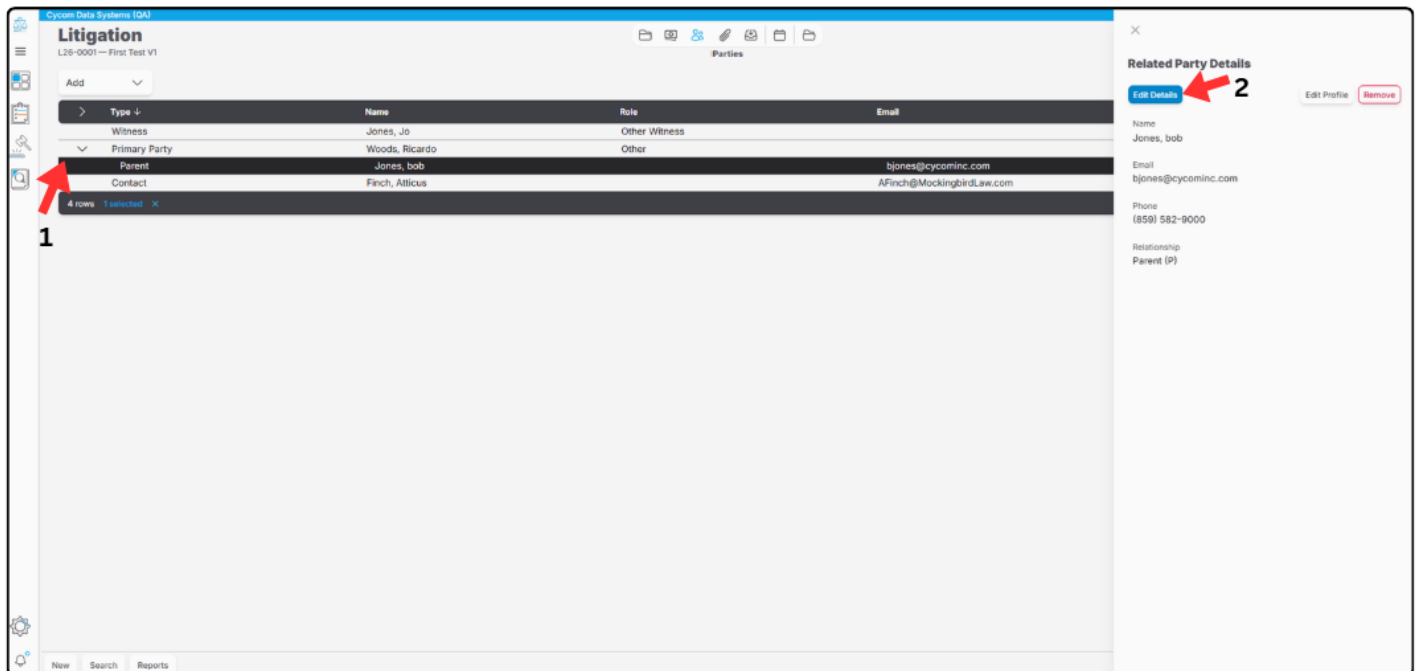
Save or Cancel

Close or Exit

Prefix	First Name	Middle Name	Last Name	Suffix
Title	Company			☐ Print Title
				☐ Print Company
Type	Tax ID	HICN	Sex	☐ Corporation
				☐ CMS Reportable
Date of Birth	Date of Death	Bar Number		
Address				Phone 1
Unit				Phone 2
City	State	ZIP	Mobile	
Email	Interoffice		Fax	
Salutation				
Comments				

Edit Any Party

To edit any party's contact record, first **select** the individual so that it appears highlighted. The proper **Details** card will appear to the right of the screen. Next, select the blue **Edit Details** button on the left side of the **Details** card.



The screenshot displays the 'Litigation' interface with a table of parties. The table has columns for Type, Name, Role, and Email. The 'Parent' row is highlighted. A red arrow labeled '1' points to the 'Add' button in the left sidebar. A red arrow labeled '2' points to the 'Edit Details' button in the 'Related Party Details' card on the right.

Type	Name	Role	Email
Witness	Jones, Jo	Other Witness	
Primary Party	Woods, Ricardo	Other	
Parent	Jones, bob		bjones@cycominc.com
Contact	Finch, Atticus		AFinch@MockingbirdLaw.com

4 rows 1 selected

Related Party Details

[Edit Details](#) [Edit Profile](#) [Remove](#)

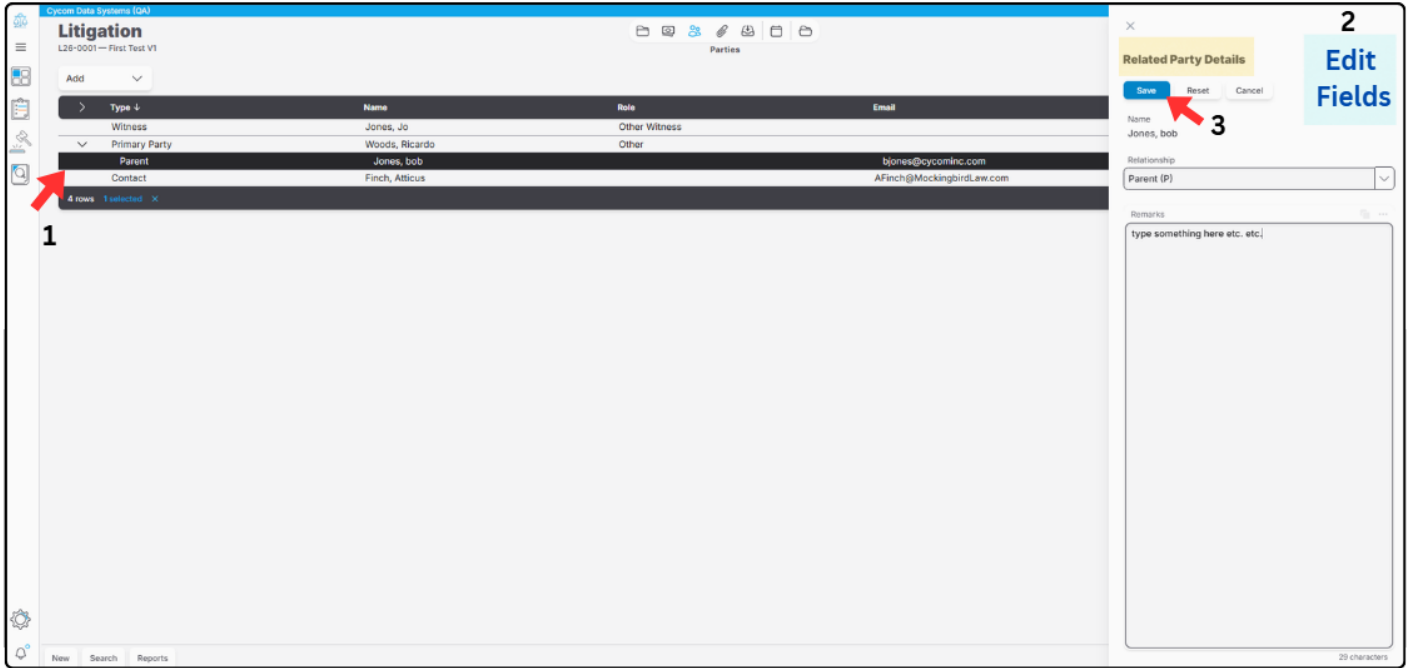
Name: Jones, bob

Email: bjones@cycominc.com

Phone: (859) 582-9000

Relationship: Parent (P)

A new appropriate **Party Details** card will open to make edits. After making the edits, click the blue **Save** button on the left to save your changes.



The screenshot displays the 'Litigation' interface with a table of parties. The table has columns for Type, Name, Role, and Email. The 'Add' button is located in the top left corner. The 'Related Party Details' modal is open on the right, showing fields for Name, Relationship, and Remarks. The 'Save' button is highlighted with a red arrow labeled '3', and the 'Edit Fields' button is highlighted with a red arrow labeled '2'. A red arrow labeled '1' points to the 'Add' button in the top left corner.

Type	Name	Role	Email
Witness	Jones, Jo	Other Witness	
Primary Party	Woods, Ricardo	Other	
Parent	Jones, bob		bjones@cycominc.com
Contact	Finch, Atticus		AFinch@MockingbirdLaw.com

4 rows 1 selected

Related Party Details

Save **Reset** **Cancel**

Name: Jones, bob

Relationship: Parent (P)

Remarks: type something here etc. etc.

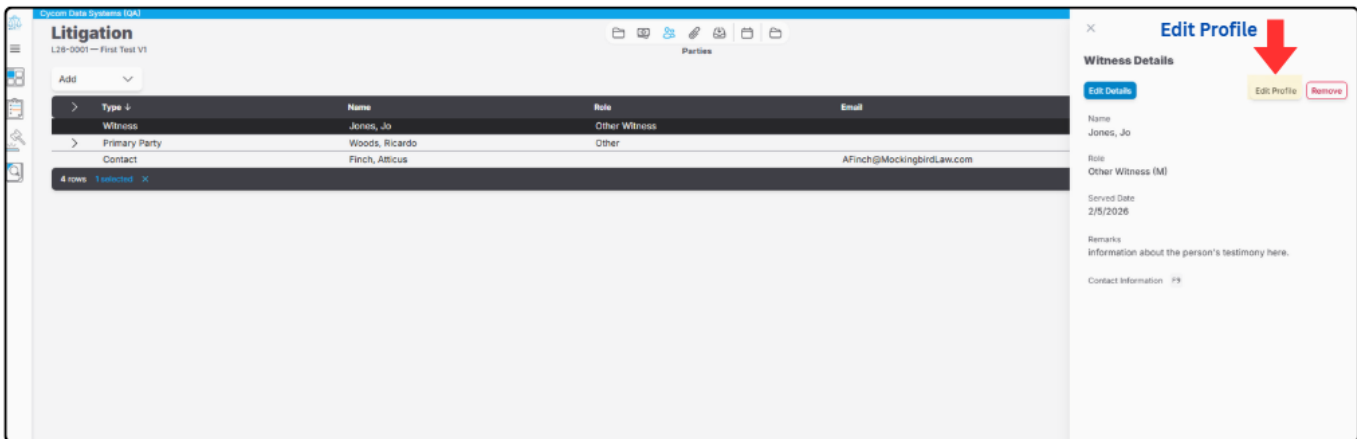
20 characters

Edit Fields

Edit Profile of Any Party

NOTE: You are editing the source information of the profile. Changes made here will be applied throughout the application.

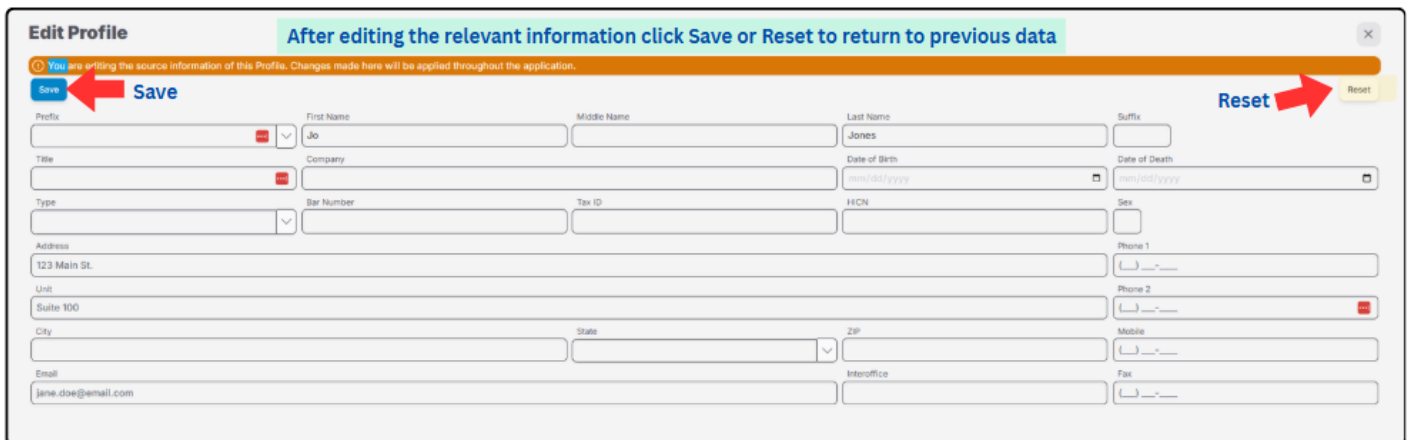
To **Edit the profile** of any party. Select the name of the individual; it will become highlighted, and **the appropriate Details card** will appear to the right of the screen. Next, click **Edit Profile**.



The screenshot shows the 'Litigation' section with a table of parties. The 'Edit Profile' dialog is open for 'Jones, Jo', showing details like Name, Role (Other Witness), Served Date (2/5/2026), and Remarks.

Type	Name	Role	Email
Witness	Jones, Jo	Other Witness	
Primary Party	Woods, Ricardo		
Contact	Finch, Atticus		AFinch@MockingbirdLaw.com

The **Edit Profile** dialogue will open. Enter all the information you have on the individual in the appropriate fields, then click **Save**. If you decide **not to save the profile**, click **Reset** and close the dialogue by clicking on the X to top right of the screen.



The 'Edit Profile' form contains various fields for personal and contact information. The 'Save' button is highlighted with a red arrow, and the 'Reset' button is also highlighted with a red arrow.

Save **Reset**

After editing the relevant information click Save or Reset to return to previous data

You are editing the source information of this Profile. Changes made here will be applied throughout the application.

Profile: [First Name: Jo] [Middle Name:] [Last Name: Jones] [Suffix:]

Title: [] Company: [] Date of Birth: [mm/dd/yyyy] Date of Death: [mm/dd/yyyy]

Type: [] Bar Number: [] Tax ID: [] HCN: [] Sex: []

Address: 123 Main St. Phone 1: []

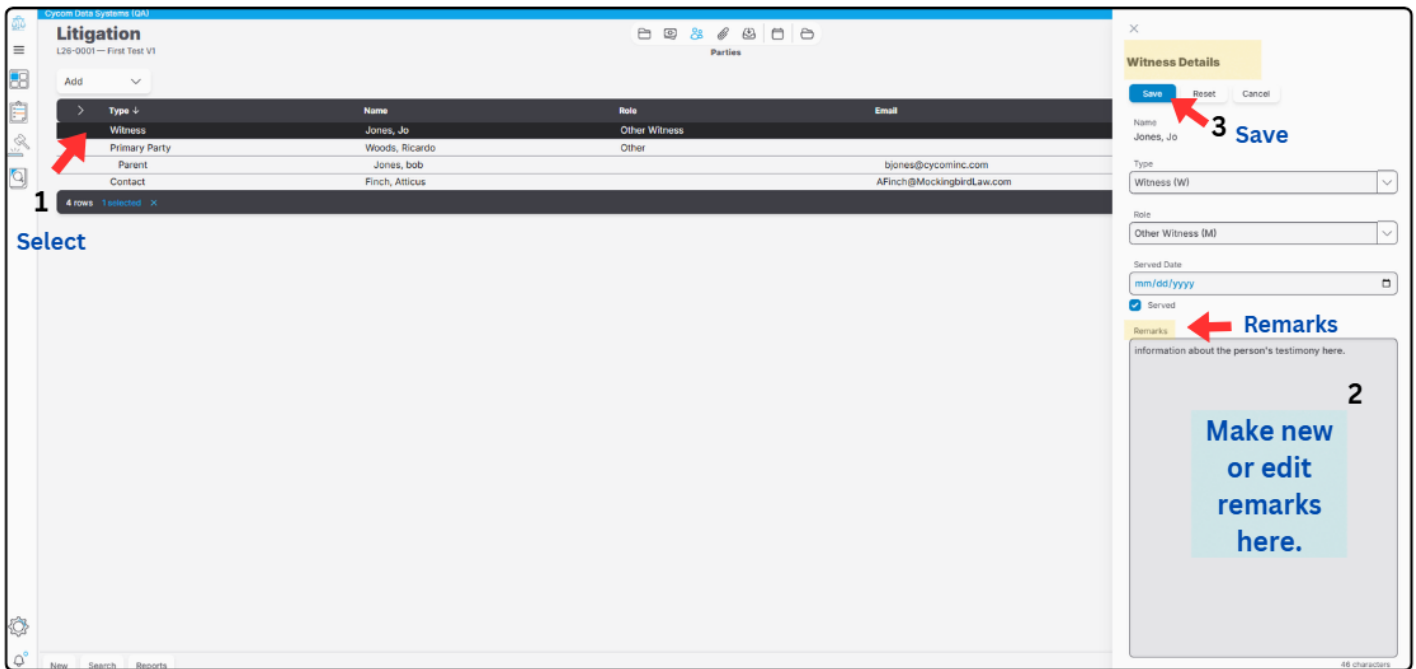
Unit: Suite 100 Phone 2: []

City: [] State: [] ZIP: [] Mobile: []

Email: jane.doe@email.com Interoffice: [] Fax: []

Add or Edit Remarks for Any Party

To **add or edit the Remarks** for a **Primary or Related, Witness, or Contact Party**, first select the individual so that it appears highlighted. The **proper Details card** will appear to the right of the screen. Next, select the blue **Edit Details** button on the left side of the **Details card**. Make a new, update or edit your Remarks entry, then click **Save**.



The screenshot shows the 'Litigation' section of the CYCOM Data Systems interface. A table lists parties with columns for Type, Name, Role, and Email. A red arrow labeled '1' points to the 'Add' button in the top left. The 'Witness Details' sidebar on the right contains a 'Save' button (labeled '3') and a 'Remarks' section (labeled '2') with a text area for entering remarks. A red arrow labeled '2' points to the 'Remarks' section, and another red arrow labeled '3' points to the 'Save' button.

Type	Name	Role	Email
Witness	Jones, Jo	Other Witness	
Primary Party	Woods, Ricardo	Other	
Parent	Jones, bob		bjones@cycominc.com
Contact	Finch, Atticus		AFinch@MockingbirdLaw.com

4 rows • 1 selected

Witness Details

Save **Reset** **Cancel**

Name: Jones, Jo

Type: Witness (W)

Role: Other Witness (M)

Served Date: mm/dd/yyyy

☒ Served

Remarks

Information about the person's testimony here.

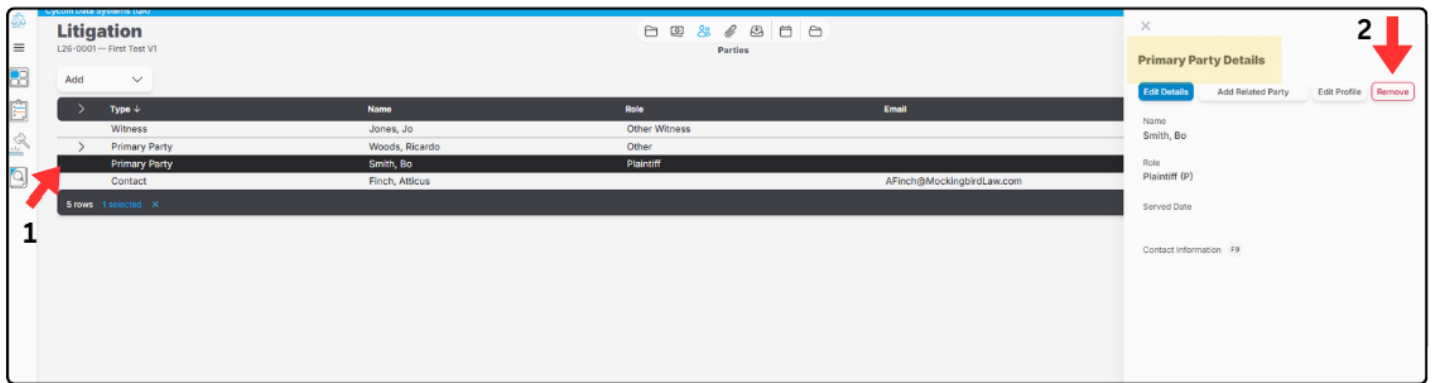
Make new or edit remarks here.

48 characters

Remove Any Party

To remove a **Primary or Related, Witness, or Contact Party** from a matter, first select the individual so that it appears highlighted. The **Primary Party or Related Party, Witness, or Contact Details card** will appear to the right of the screen, select the red **Remove** button this will remove the individual from the list or delete it from the matter.

Primary Party Details Card



Litigation
L26-0001 — First Test V1

Parties

Type	Name	Role	Email
Witness	Jones, Jo	Other Witness	
Primary Party	Woods, Ricardo	Other	
Primary Party	Smith, Bo	Plaintiff	
Contact	Finch, Atticus		AFinch@MockingbirdLaw.com

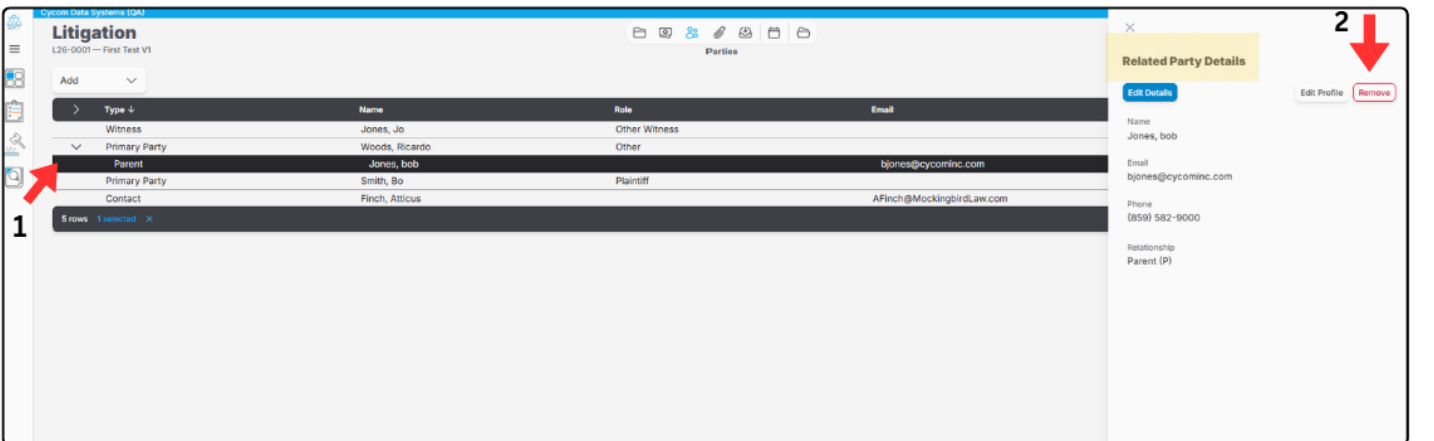
5 rows | 1 selected

Primary Party Details

Edit Details | Add Related Party | Edit Profile | **Remove**

Name: Smith, Bo
Role: Plaintiff (P)
Served Date:
Contact Information: FF

Related Party Details Card



Litigation
L26-0001 — First Test V1

Parties

Type	Name	Role	Email
Witness	Jones, Jo	Other Witness	
Primary Party	Woods, Ricardo	Other	
Parent	Jones, bob		bjones@cycominc.com
Primary Party	Smith, Bo	Plaintiff	
Contact	Finch, Atticus		AFinch@MockingbirdLaw.com

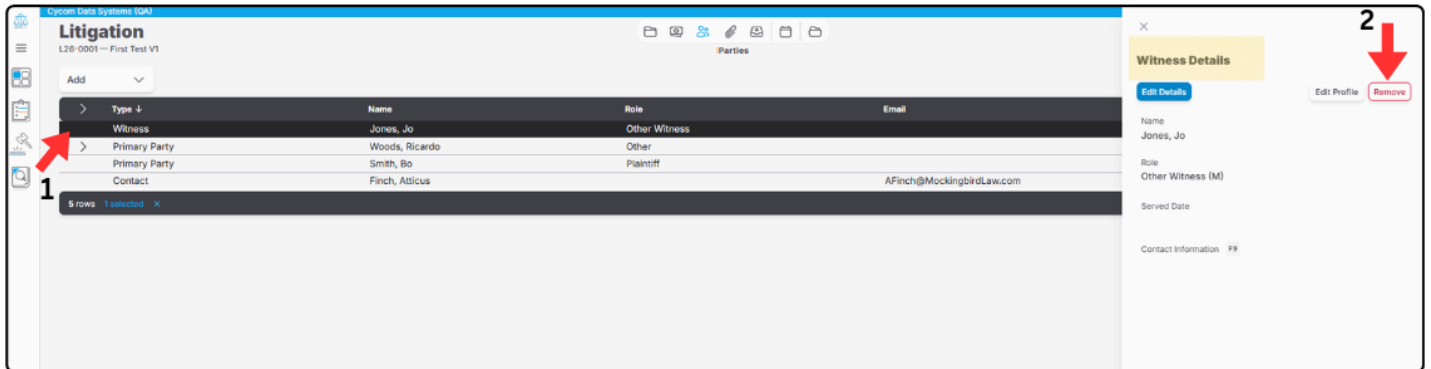
5 rows | 1 selected

Related Party Details

Edit Details | Edit Profile | **Remove**

Name: Jones, bob
Email: bjones@cycominc.com
Phone: (859) 582-9000
Relationship: Parent (P)

Witness Details Card



Litigation
L26-0001 — First Test V1

Add

Type	Name	Role	Email
Witness	Jones, Jo	Other Witness	
Primary Party	Woods, Ricardo	Other	
Primary Party	Smith, Bo	Plaintiff	
Contact	Finch, Atticus		AFinch@MockingbirdLaw.com

5 rows 1 selected

Witness Details

Edit Details

Edit Profile Remove

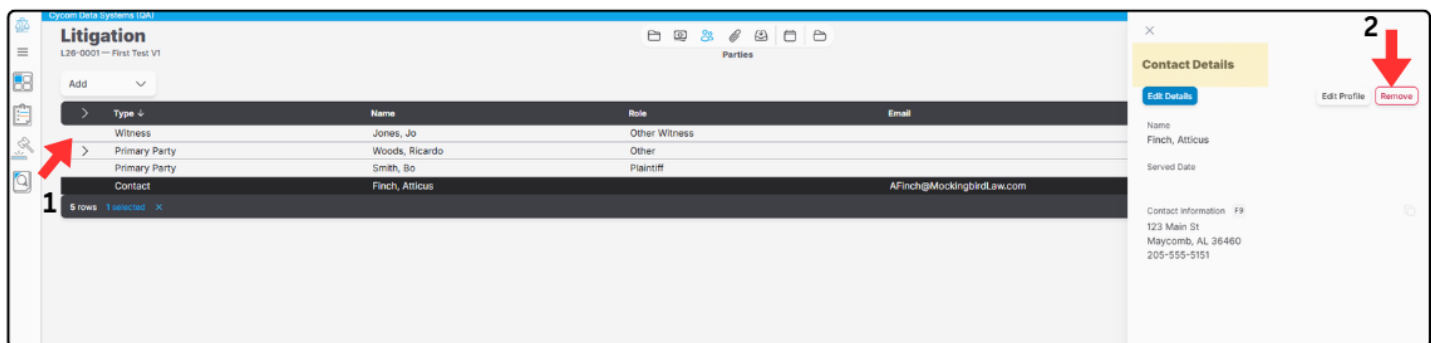
Name
Jones, Jo

Role
Other Witness (M)

Served Date

Contact Information F9

Contact Details Card



Litigation
L26-0001 — First Test V1

Add

Type	Name	Role	Email
Witness	Jones, Jo	Other Witness	
Primary Party	Woods, Ricardo	Other	
Primary Party	Smith, Bo	Plaintiff	
Contact	Finch, Atticus		AFinch@MockingbirdLaw.com

5 rows 1 selected

Contact Details

Edit Details

Edit Profile Remove

Name
Finch, Atticus

Served Date

Contact Information F9
123 Main St
Maycomb, AL 36460
205-555-5151