

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

**Contents:**

- [Parties Tab](#)
- [Witnesses Tab](#)
- [Contacts Tab](#)
- [Caption Tab](#)

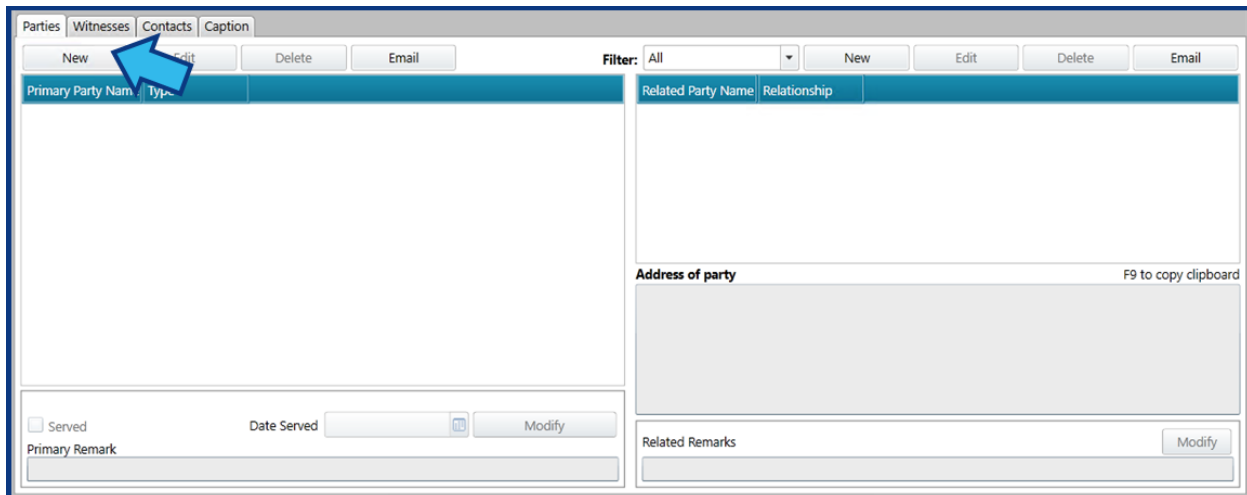
Parties Tab

Contents:

- [Add Primary Party](#)
- [Add Related Party](#)
- [Edit Primary or Related Party](#)
- [Delete Primary or Related Party](#)
- [Email Primary or Related Party](#)
- [Add or Edit Remark for Primary or Related Party](#)
- [Modify Primary or Related Party Type](#)

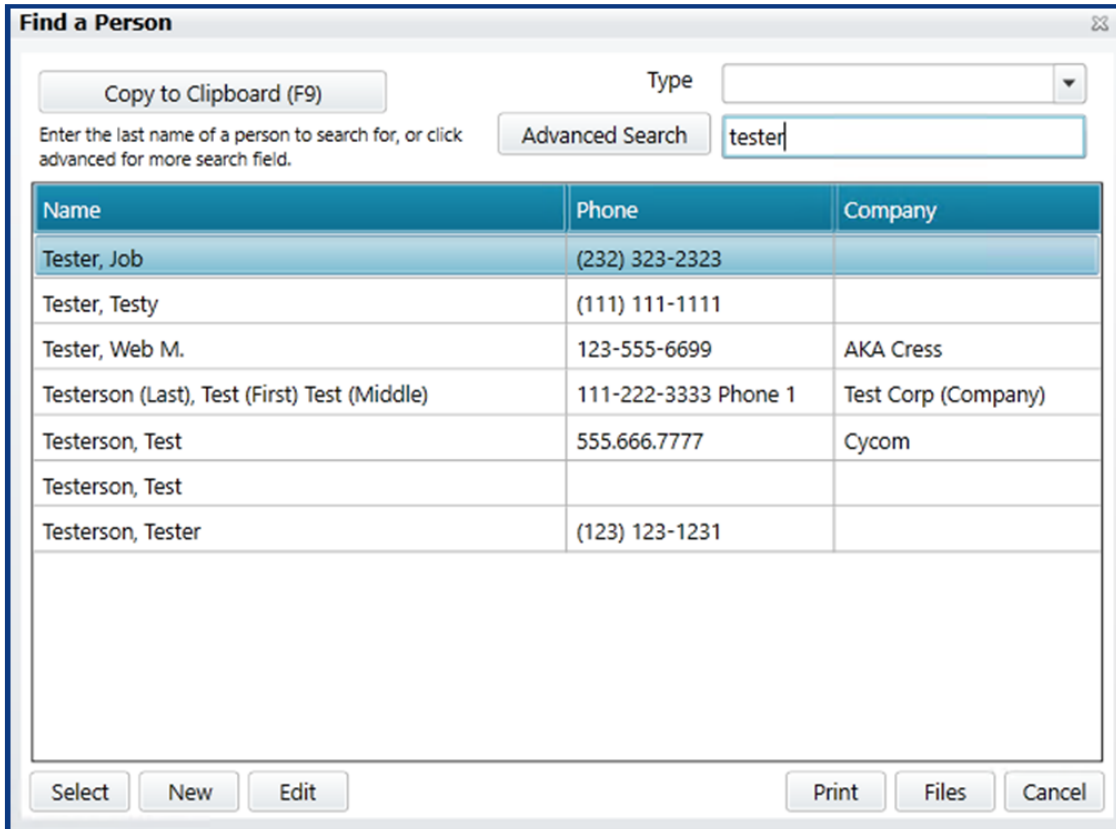
Add Primary Party

To add a new primary party to a matter, select **New** on the left side of the **Parties** tab.



The screenshot shows the 'Parties' tab interface. At the top, there are tabs for 'Parties', 'Witnesses', 'Contacts', and 'Caption'. Below the tabs is a toolbar with buttons for 'New', 'Edit', 'Delete', and 'Email'. A blue arrow points to the 'New' button. To the right of the toolbar is a 'Filter:' dropdown menu set to 'All', and another set of 'New', 'Edit', 'Delete', and 'Email' buttons. The main area is divided into two columns. The left column has a header 'Primary Party Name' and 'Type' and is currently empty. The right column has a header 'Related Party Name' and 'Relationship' and is also empty. Below the right column is a text area labeled 'Address of party' with a note 'F9 to copy clipboard'. At the bottom left, there is a checkbox for 'Served', a 'Date Served' field, and a 'Modify' button. At the bottom right, there is a 'Related Remarks' field with a 'Modify' button.

Locate the person in the **Find a Person** window that appears. Enter the person's last name in the search field to the right of the **Advanced Search** button.



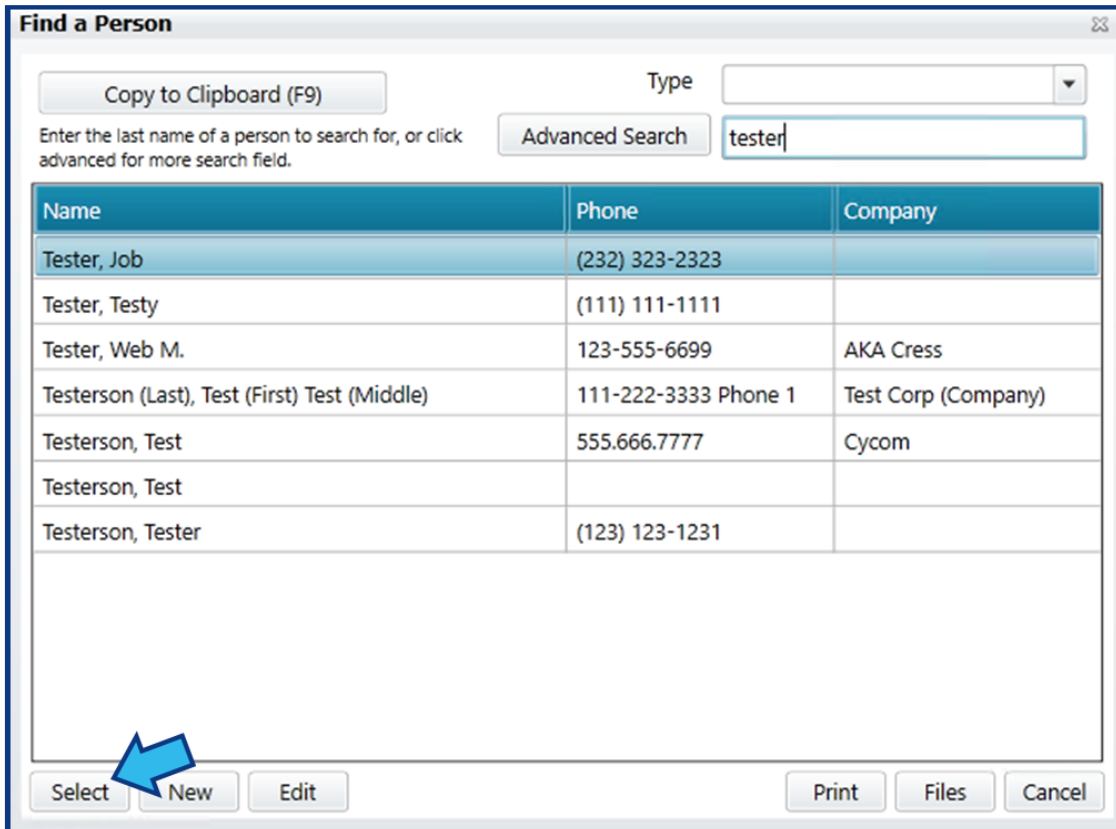
The screenshot shows a window titled "Find a Person" with a search interface. At the top left is a "Copy to Clipboard (F9)" button. To its right is a "Type" dropdown menu. Below these is a text input field containing "tester" and an "Advanced Search" button. A small instruction reads: "Enter the last name of a person to search for, or click advanced for more search field." Below the search area is a table with three columns: "Name", "Phone", and "Company".

Name	Phone	Company
Tester, Job	(232) 323-2323	
Tester, Testy	(111) 111-1111	
Tester, Web M.	123-555-6699	AKA Cress
Testerson (Last), Test (First) Test (Middle)	111-222-3333 Phone 1	Test Corp (Company)
Testerson, Test	555.666.7777	Cycom
Testerson, Test		
Testerson, Tester	(123) 123-1231	

At the bottom of the window are buttons for "Select", "New", "Edit", "Print", "Files", and "Cancel".

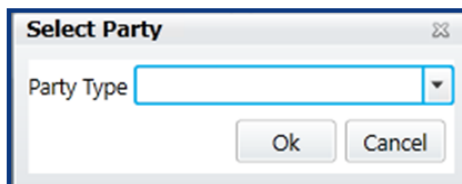
If a search reveals the person is not already identified in **CLW**, you will need to add them. To add a person, select **New** in the bottom left corner. This will open an **Add** window. Enter the known information for the person and then select **Save**. Now the person will appear in the search list in the **Find a Person** window.

Once you have found the person, highlight their name in the list and press **Select**.



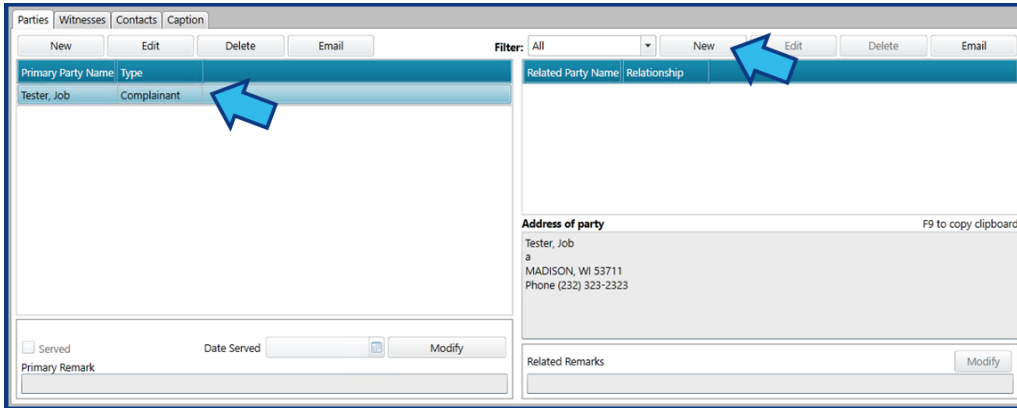
Name	Phone	Company
Tester, Job	(232) 323-2323	
Tester, Testy	(111) 111-1111	
Tester, Web M.	123-555-6699	AKA Cress
Testerson (Last), Test (First) Test (Middle)	111-222-3333 Phone 1	Test Corp (Company)
Testerson, Test	555.666.7777	Cycom
Testerson, Test		
Testerson, Tester	(123) 123-1231	

A **Select Party** window will appear. Select the type of party using the drop-down list of **Party Type** options and then select **Ok**.

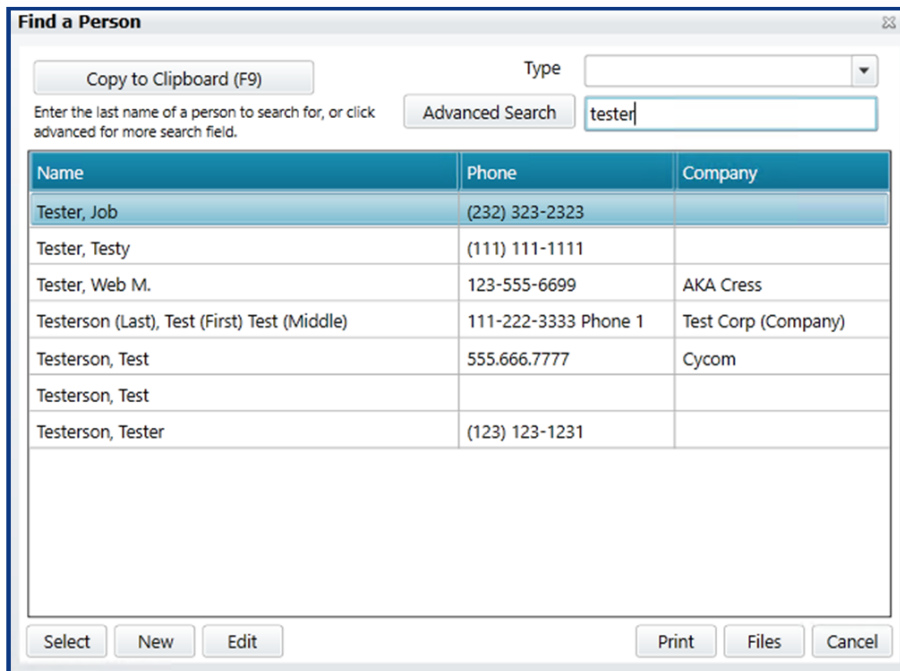


Add Related Party

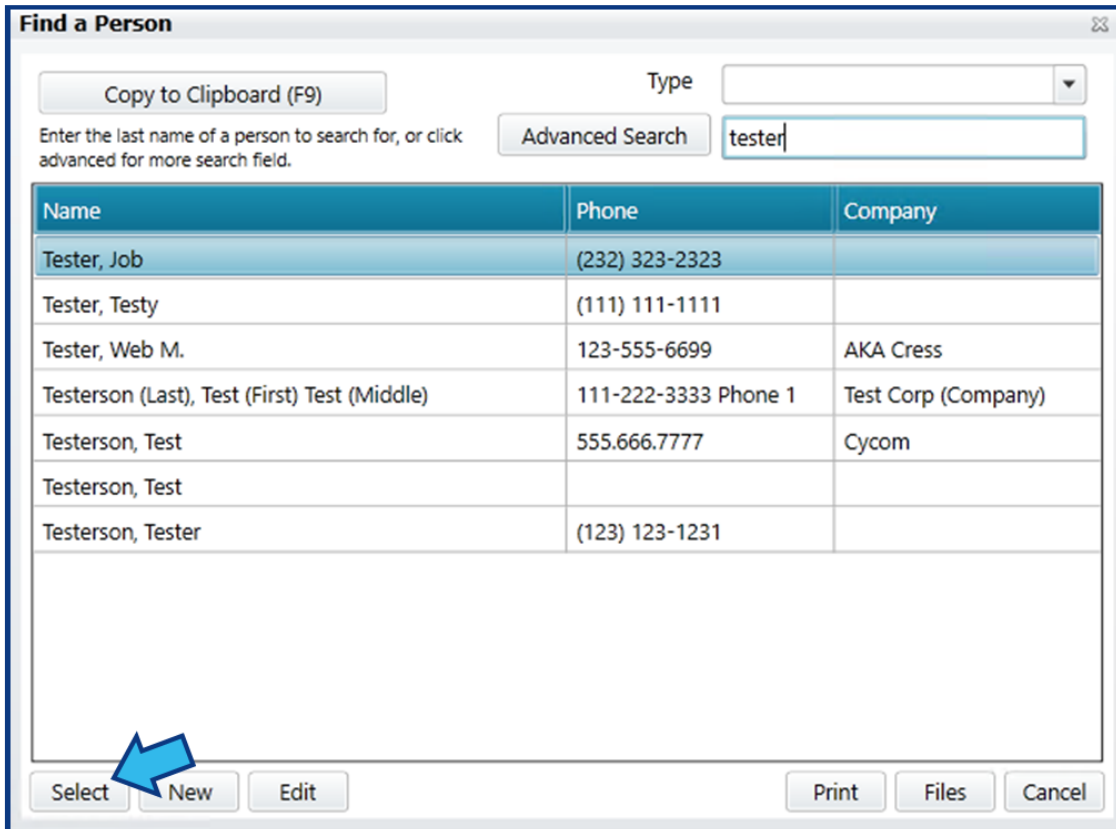
To add a new related party to a matter, first select the primary party on the left to which the related party is associated. Next, select **New** on the right side of the **Parties** tab.



Locate the person in the **Find a Person** window that appears. Enter the person's last name in the search field to the right of the **Advanced Search** button. If a search reveals the person is not already identified in **CLW**, you will need to add them. To add a person, select **New** in the bottom left corner. Enter the known information for the person and then select **Save**. Now the person will appear in the search list.

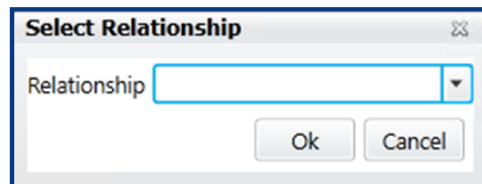


Once you have found the person, highlight their name in the list and press **Select**.



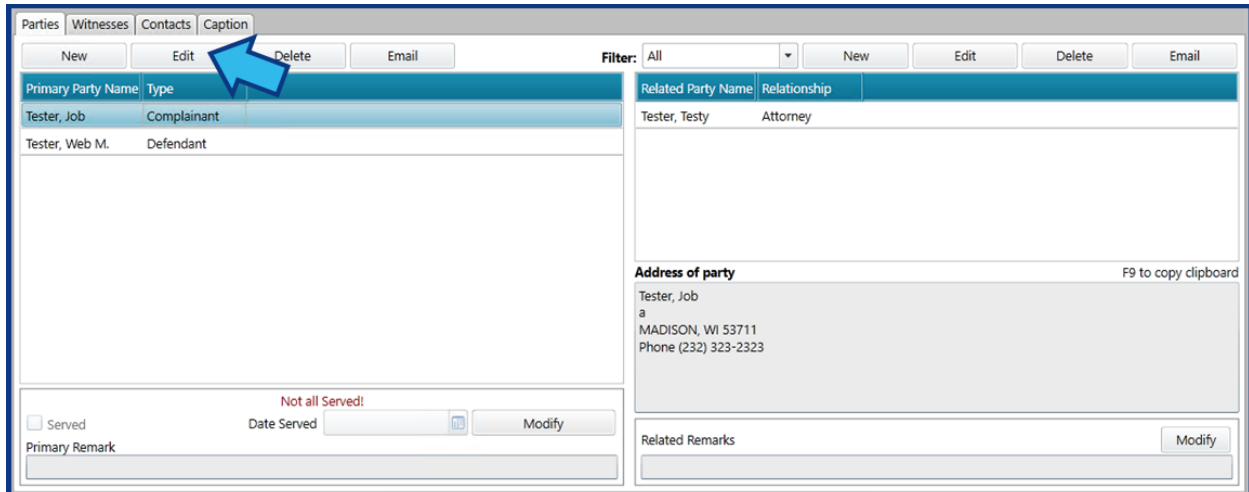
Name	Phone	Company
Tester, Job	(232) 323-2323	
Tester, Testy	(111) 111-1111	
Tester, Web M.	123-555-6699	AKA Cress
Testerson (Last), Test (First) Test (Middle)	111-222-3333 Phone 1	Test Corp (Company)
Testerson, Test	555.666.7777	Cycom
Testerson, Test		
Testerson, Tester	(123) 123-1231	

A **Select Relationship** window will appear. Select the type of relationship using the drop-down list of **Relationship** options and then select **Ok**.



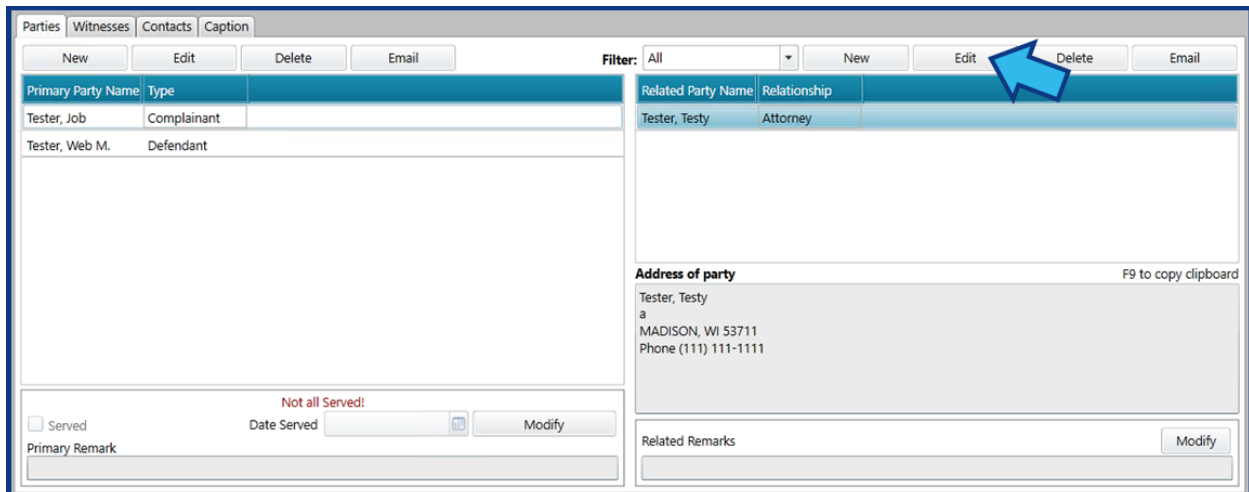
Edit Primary or Related Party

To edit a primary or related party’s contact record, first select the individual so that it appears highlighted in blue. Next, select the appropriate **Edit** button. To edit a primary party, select the **Edit** button on the left side.



The screenshot shows the 'Parties' tab selected. The 'Primary Party Name' table has two rows: 'Tester, Job' (Complainant) and 'Tester, Web M.' (Defendant). The 'Tester, Job' row is highlighted in blue. A blue arrow points to the 'Edit' button in the top toolbar. The 'Related Party Name' table has one row: 'Tester, Testy' (Attorney). The 'Address of party' field contains: 'Tester, Job', 'a', 'MADISON, WI 53711', 'Phone (232) 323-2323'. The 'Served' checkbox is unchecked, and the 'Date Served' field is empty. The 'Primary Remark' and 'Related Remarks' fields are also empty.

To edit a related party, select the **Edit** button on the right side.

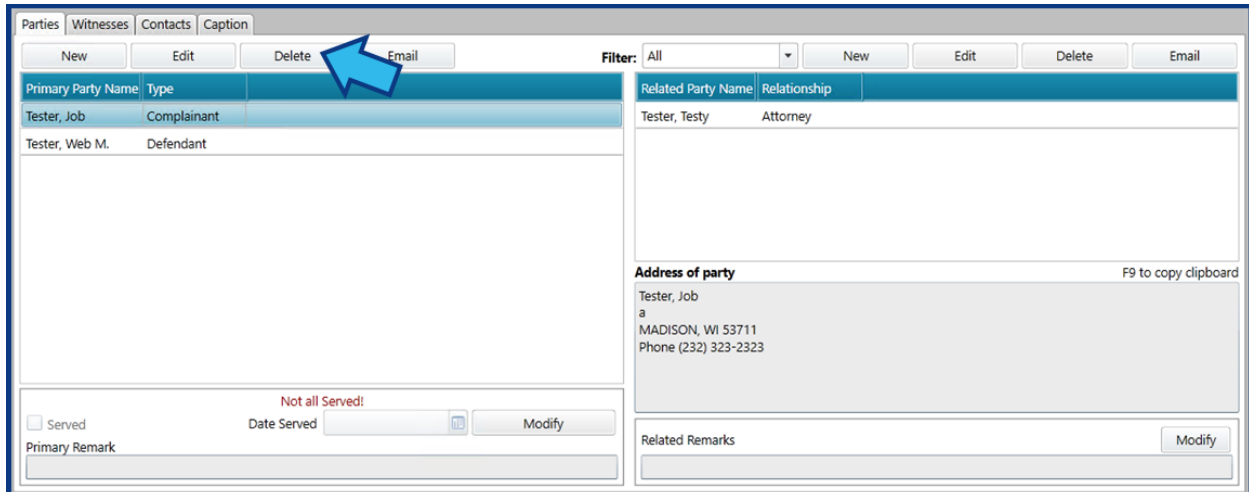


The screenshot shows the 'Parties' tab selected. The 'Primary Party Name' table has two rows: 'Tester, Job' (Complainant) and 'Tester, Web M.' (Defendant). The 'Related Party Name' table has one row: 'Tester, Testy' (Attorney), which is highlighted in blue. A blue arrow points to the 'Edit' button in the top toolbar. The 'Address of party' field contains: 'Tester, Testy', 'a', 'MADISON, WI 53711', 'Phone (111) 111-1111'. The 'Served' checkbox is unchecked, and the 'Date Served' field is empty. The 'Primary Remark' and 'Related Remarks' fields are also empty.

Edit the desired fields in the contact record and then select **Save**.

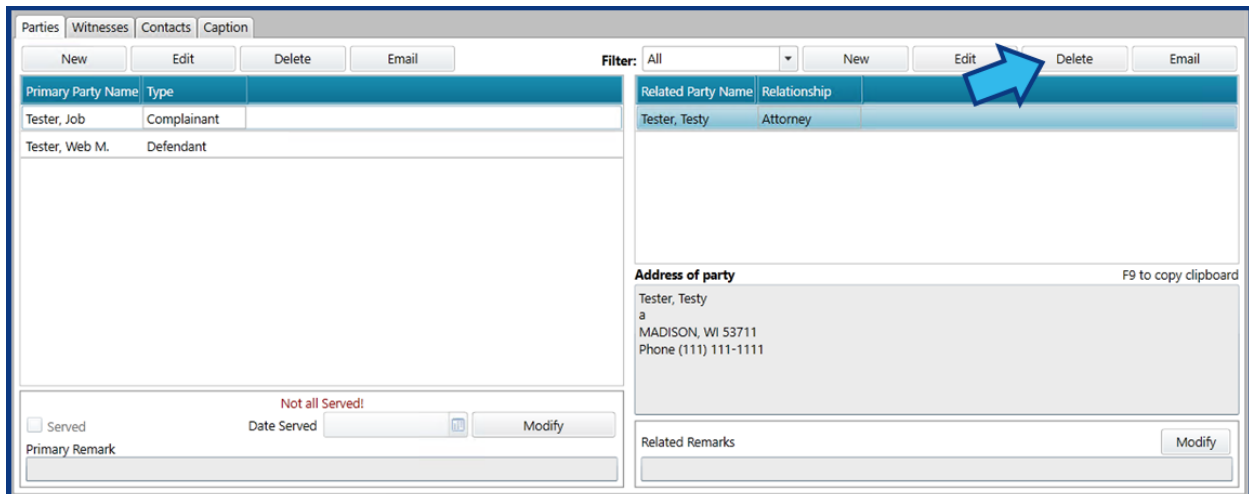
Delete Primary or Related Party

To delete a primary or related party from a matter, first select the individual so that it appears highlighted in blue. Next, select the appropriate **Delete** button. To delete a primary party, select the **Delete** button on the left side.



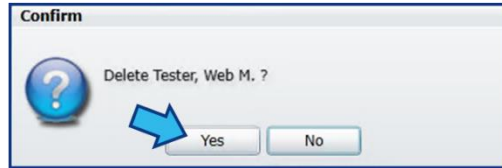
The screenshot shows the 'Parties' tab selected. The 'Primary Party Name' table has two rows: 'Tester, Job' (Complainant) and 'Tester, Web M.' (Defendant). The 'Delete' button in the top toolbar is highlighted with a blue arrow. The 'Related Party Name' table has one row: 'Tester, Testy' (Attorney). The 'Address of party' field contains: 'Tester, Job', 'a', 'MADISON, WI 53711', 'Phone (232) 323-2323'. The 'Served' checkbox is unchecked, and the 'Date Served' field is empty. The 'Primary Remark' and 'Related Remarks' fields are also empty.

To delete a related party, select the **Delete** button on the right side.



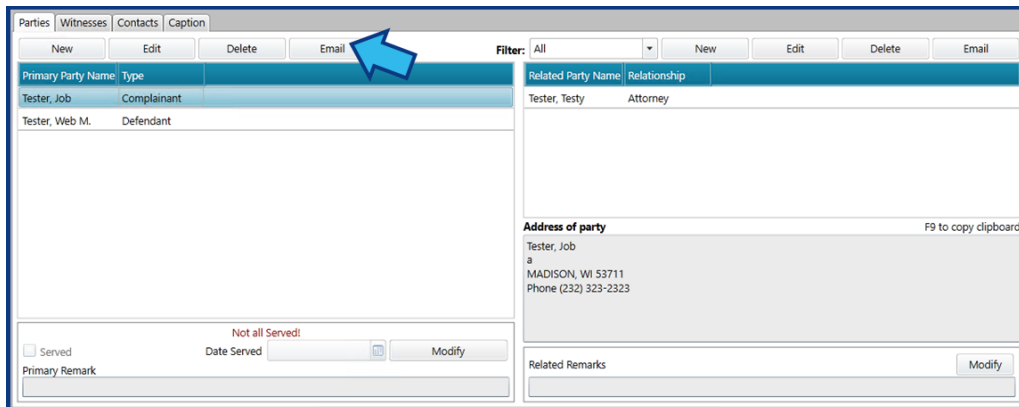
The screenshot shows the 'Parties' tab selected. The 'Primary Party Name' table has two rows: 'Tester, Job' (Complainant) and 'Tester, Web M.' (Defendant). The 'Delete' button in the top toolbar is highlighted with a blue arrow. The 'Related Party Name' table has one row: 'Tester, Testy' (Attorney). The 'Address of party' field contains: 'Tester, Testy', 'a', 'MADISON, WI 53711', 'Phone (111) 111-1111'. The 'Served' checkbox is unchecked, and the 'Date Served' field is empty. The 'Primary Remark' and 'Related Remarks' fields are also empty.

A **Confirm** window will appear. Select **Yes** to delete the individual from the matter. NOTE: Deleting an individual this way does not delete the contact record in **CLW**. It only removes their association to this matter.

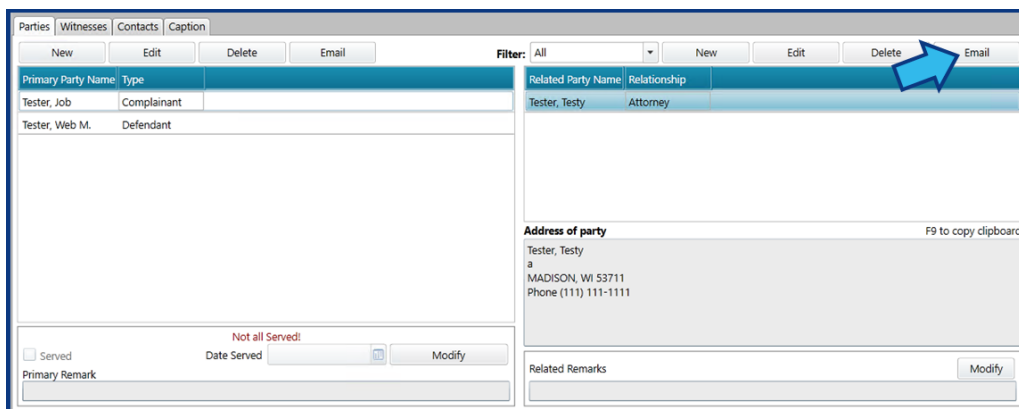


Email Primary or Related Party

To email a primary or related party, first select the individual so that it appears highlighted in blue. Next, select the appropriate **Email** button. To email a primary party, select the **Email** button on the left side.



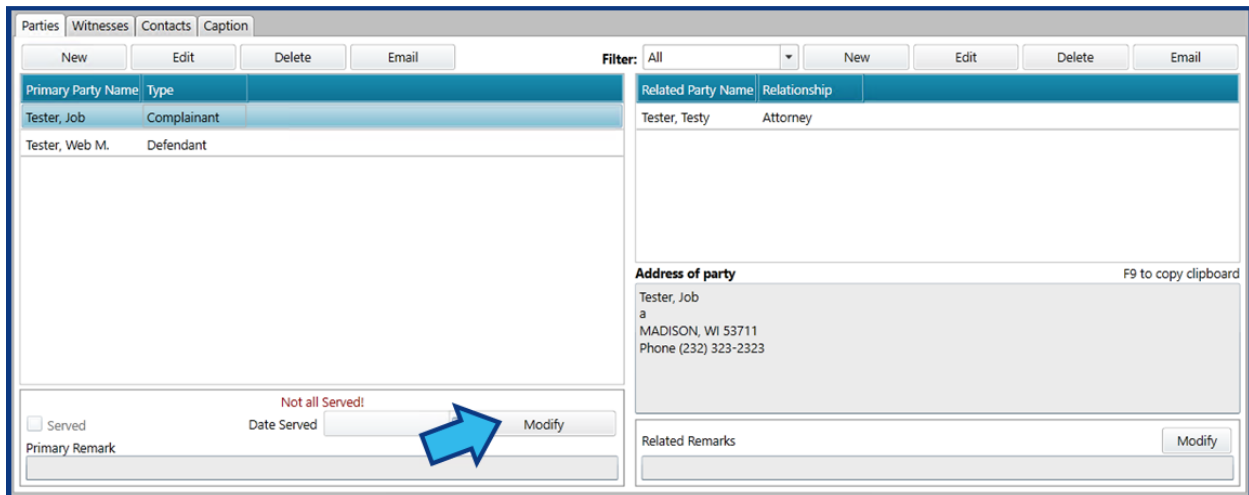
To email a related party, select the **Email** button on the right side.



Your default email client will open a new email for you to edit as desired. The subject line will be pre-populated with matter information. If the person’s contact record lists an email address, the **To** field will be pre-populated with their email address. When you are finished editing the email, select **Send**. A record of any emails sent in this way will be maintained in the **Documents** tab of the **Attachments** view for the matter.

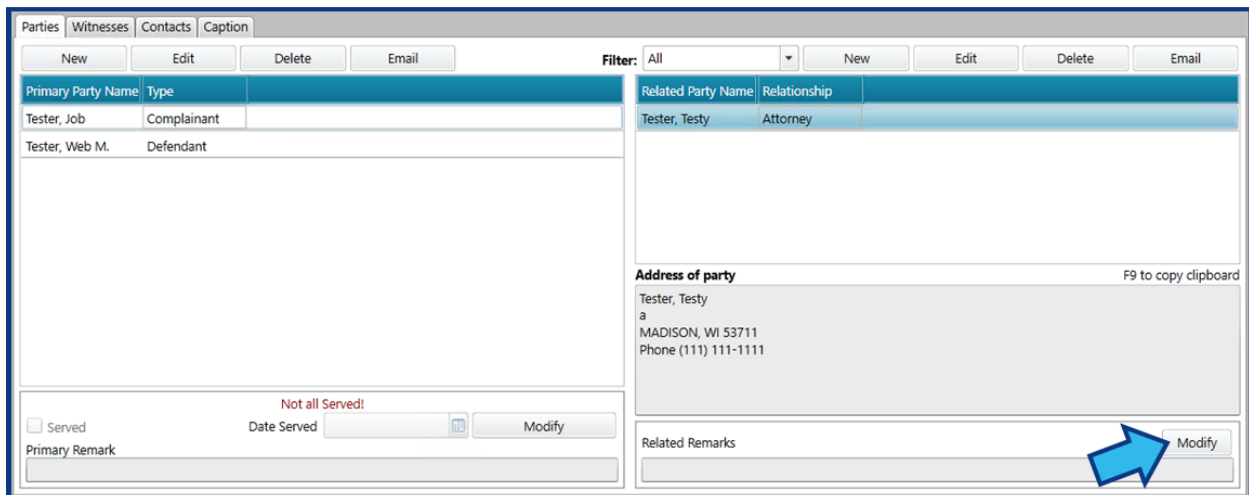
Add or Edit Remark for Primary or Related Party

To add or edit the remark for a primary or related party, first select the individual so that it appears highlighted in blue. Next, select the appropriate **Modify** button near the bottom. For a primary party, select the **Modify** button on the left side.



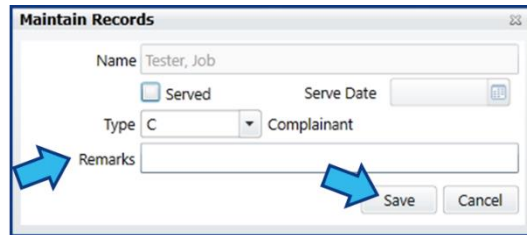
The screenshot shows the 'Parties' view with tabs for 'Parties', 'Witnesses', 'Contacts', and 'Caption'. The 'Primary Party Name' table has two rows: 'Tester, Job' (Complainant) and 'Tester, Web M.' (Defendant). The 'Tester, Job' row is highlighted in blue. Below the table, there is a 'Served' checkbox, a 'Date Served' field, and a 'Modify' button. A blue arrow points to this 'Modify' button. To the right, the 'Related Party Name' table shows 'Tester, Testy' (Attorney). Below it, the 'Address of party' section displays contact information for 'Tester, Job' in Madison, WI. At the bottom right, there is a 'Related Remarks' section with its own 'Modify' button.

For a related party, select the **Modify** button on the right side.



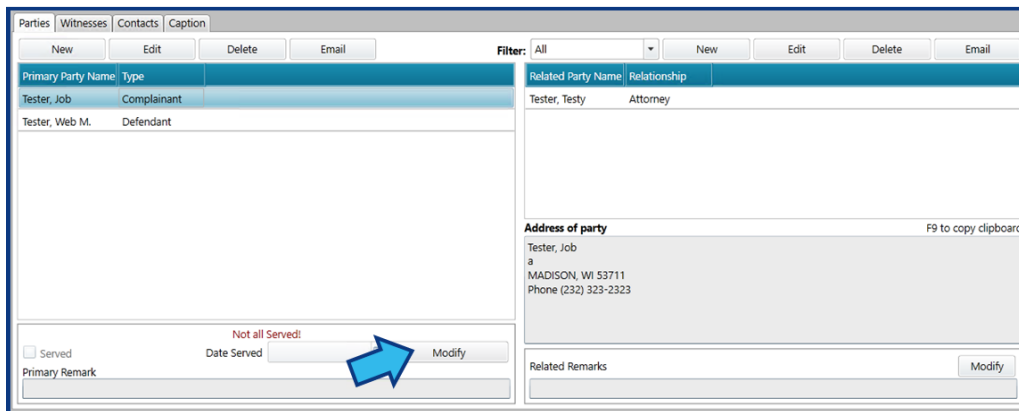
This screenshot is identical to the one above, but the 'Tester, Testy' row in the 'Related Party Name' table is highlighted in blue. A blue arrow points to the 'Modify' button located at the bottom right of the 'Related Remarks' section.

In the **Maintain Records** window that appears, enter or edit the **Remarks** field and then select **Save**.



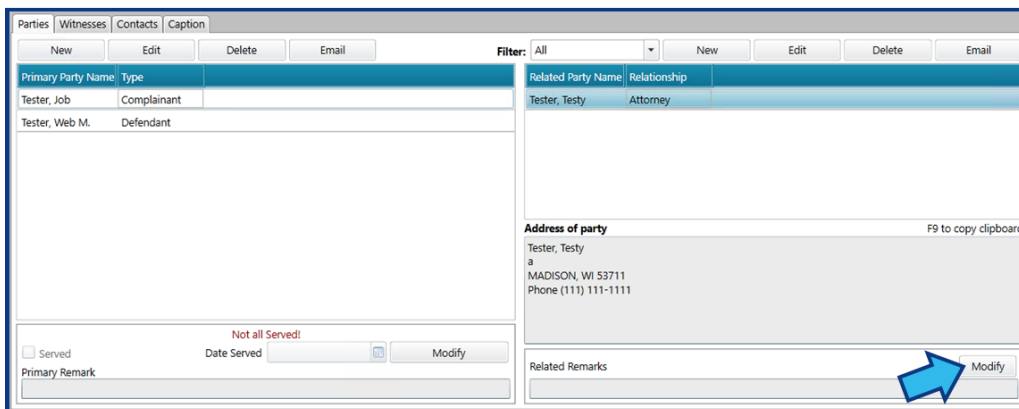
Modify Primary or Related Party Type

To modify the primary party type or related party relationship type, first select the individual so that it appears highlighted in blue. Next, select the appropriate **Modify** button near the bottom. For a primary party, select the **Modify** button on the left side.



Primary Party Name	Type
Tester, Job	Complainant
Tester, Web M.	Defendant

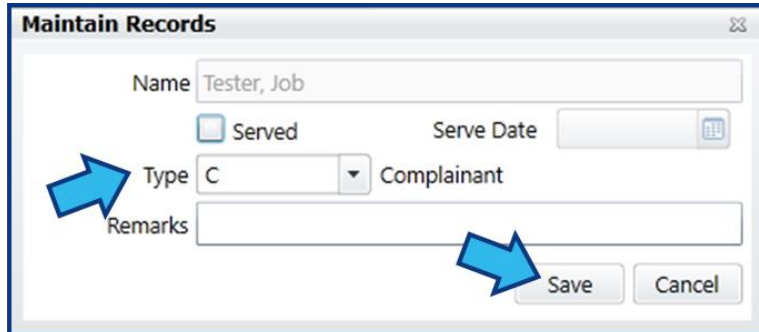
For a related party, select the **Modify** button on the right side.



Primary Party Name	Type
Tester, Job	Complainant
Tester, Web M.	Defendant

Related Party Name	Relationship
Tester, Testy	Attorney

In the **Maintain Records** window that appears, select the correct party or relationship type from the **Type** drop-down and then select **Save**.



Maintain Records

Name

Served Serve Date

Type ▼ Complainant

Remarks

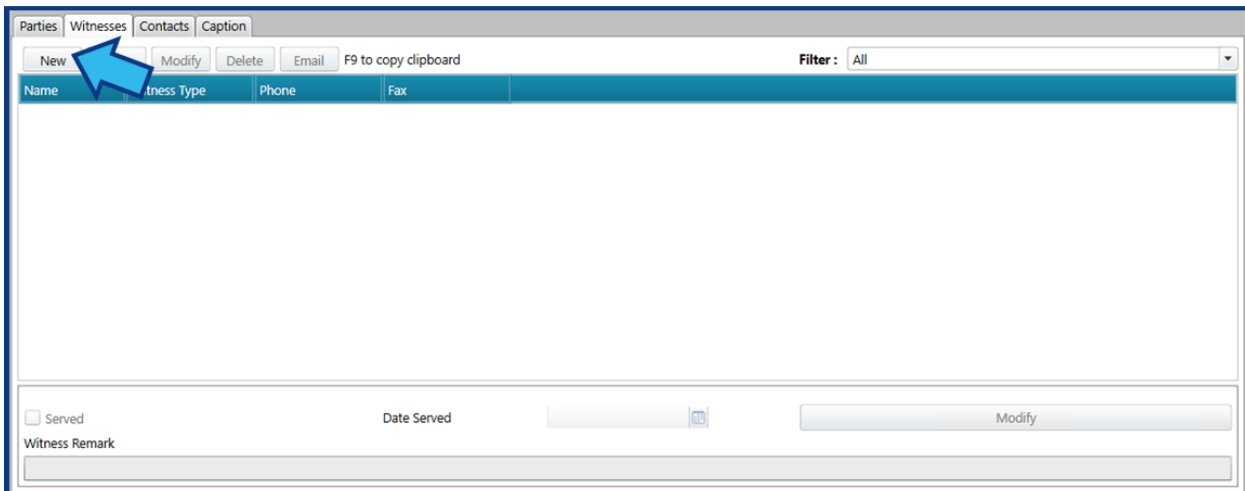
Witnesses Tab

Contents:

- [Add Witness](#)
- [Edit Witness](#)
- [Modify Witness Type](#)
- [Delete Witness](#)
- [Email Witness](#)
- [Add or Edit Remark for Witness](#)

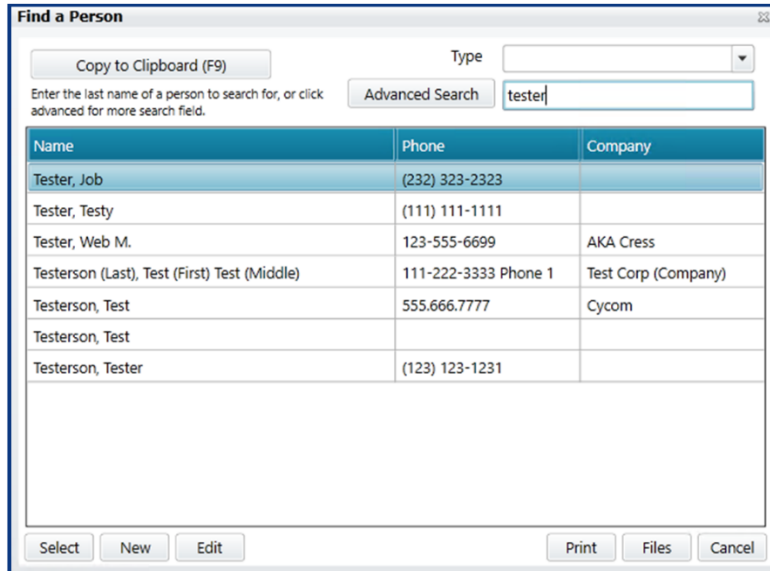
Add Witness

To add a new witness to a matter, select **New** on the **Witnesses** tab.



The screenshot shows a web application interface for managing witnesses. At the top, there are tabs for 'Parties', 'Witnesses', 'Contacts', and 'Caption'. Below the tabs is a toolbar with buttons for 'New', 'Modify', 'Delete', and 'Email'. A blue arrow points to the 'New' button. To the right of the toolbar is a 'Filter' dropdown menu set to 'All'. Below the toolbar is a table with columns for 'Name', 'Witness Type', 'Phone', and 'Fax'. The table is currently empty. At the bottom of the interface, there is a 'Witness Remark' section with a checkbox for 'Served', a 'Date Served' field, and a 'Modify' button.

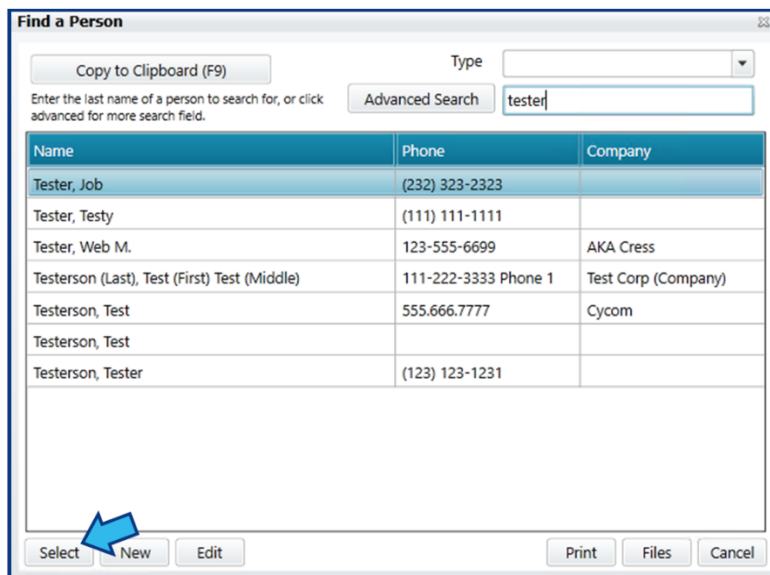
Locate the person in the **Find a Person** window that appears. Enter the person's last name in the search field to the right of the **Advanced Search** button. If a search reveals the person is not already identified in **CLW**, you will need to add them. To add a person, select **New** in the bottom left corner. Enter the known information for the person and then select **Save**. Now the person will appear in the search list.



The screenshot shows the 'Find a Person' window with the search term 'tester' entered. The search results are as follows:

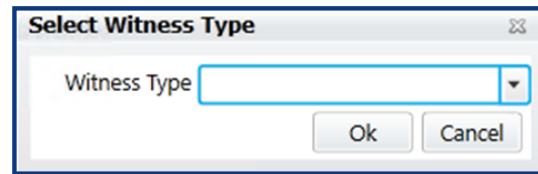
Name	Phone	Company
Tester, Job	(232) 323-2323	
Tester, Testy	(111) 111-1111	
Tester, Web M.	123-555-6699	AKA Cress
Testerson (Last), Test (First) Test (Middle)	111-222-3333 Phone 1	Test Corp (Company)
Testerson, Test	555.666.7777	Cycom
Testerson, Test		
Testerson, Tester	(123) 123-1231	

Once you have found the person, highlight their name in the list and press **Select**.



This screenshot is identical to the previous one, but with a blue arrow pointing to the 'Select' button at the bottom left of the window, indicating the next step in the process.

A **Select Witness Type** window will appear. Select the type of witness using the drop-down list of **Witness Type** options and then select **Ok**.



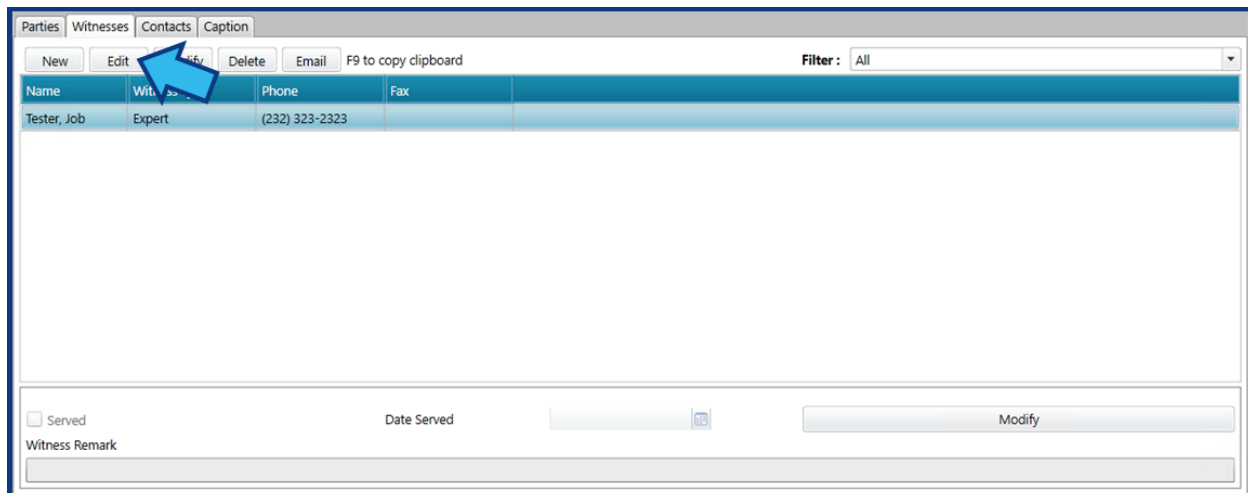
Select Witness Type

Witness Type

Ok Cancel

Edit Witness

To edit a witness's contact record, first select the individual so that it appears highlighted in blue. Next, select the **Edit** button.



Parties | Witnesses | Contacts | Caption

New Edit **Modify** Delete Email F9 to copy clipboard Filter: All

Name	Witness Type	Phone	Fax
Tester, Job	Expert	(232) 323-2323	

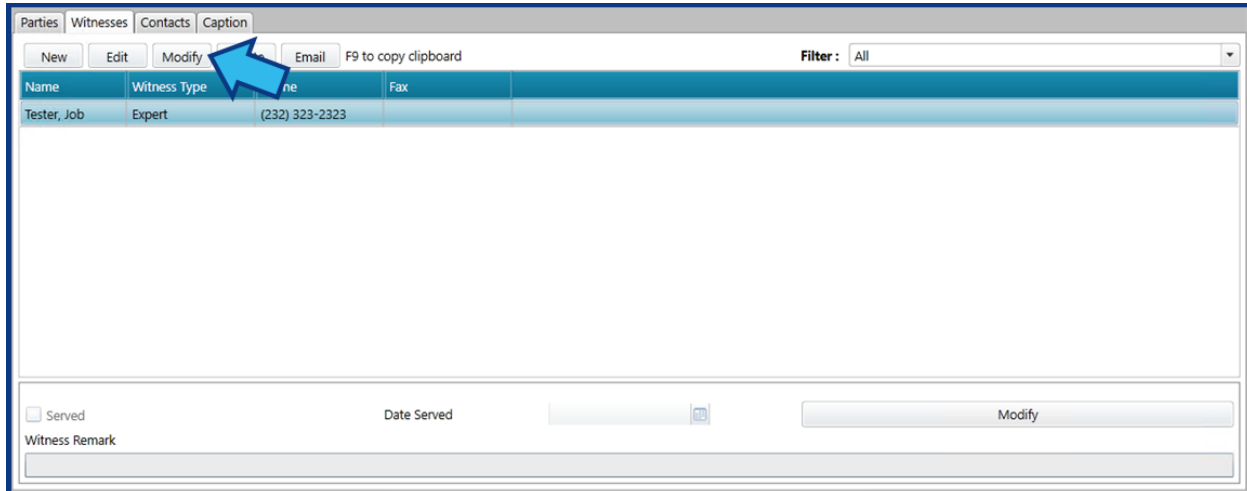
Served Date Served

Witness Remark

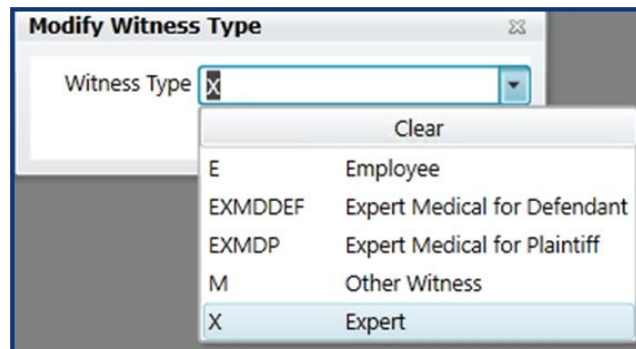
Edit the desired fields in the contact record and then select **Save**.

Modify Witness Type

To modify a witness's type, first select the individual so that it appears highlighted in blue. Next, select the **Modify** button.

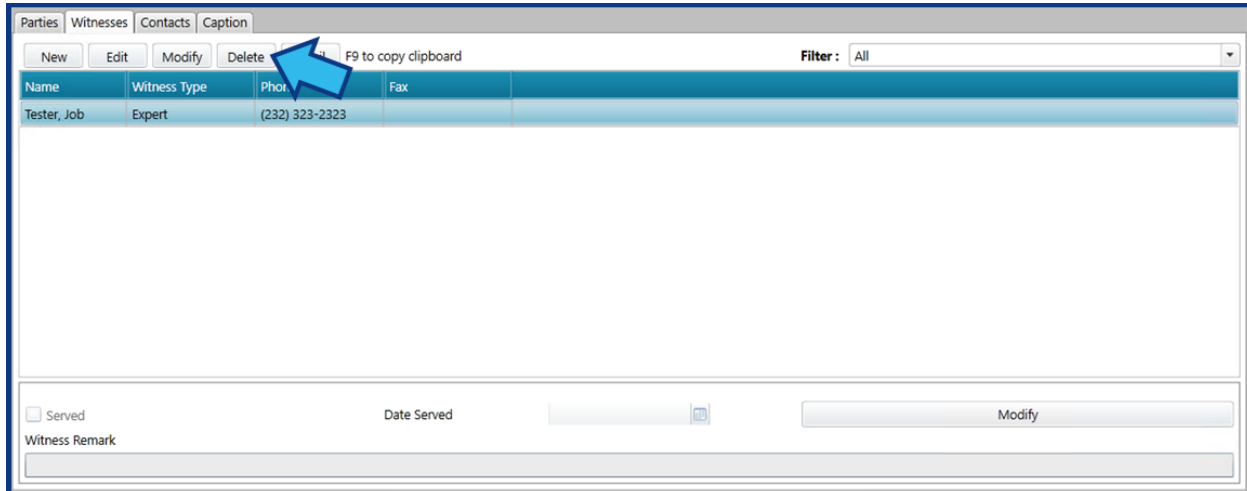


In the **Modify Witness Type** window that appears, select the correct type from the **Witness Type** drop-down and then select **Ok**. NOTE: Your drop-down options may vary from those shown below.



Delete Witness

To delete a witness from a matter, first select the individual so that it appears highlighted in blue. Next, select the **Delete** button.

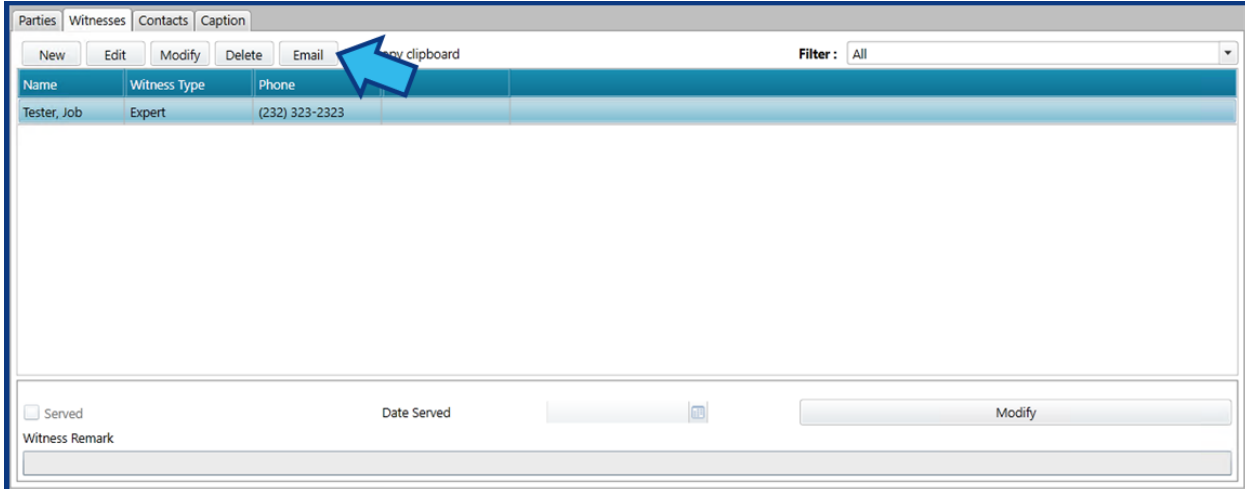


A **Confirm** window will appear. Select **Yes** to delete the individual from the matter. NOTE: Deleting an individual this way does not delete the contact record in **CLW**. It only removes their association to this matter.



Email Witness

To email a witness, first select the individual so that it appears highlighted in blue. Next, select the **Email** button.



Name	Witness Type	Phone
Tester, Job	Expert	(232) 323-2323

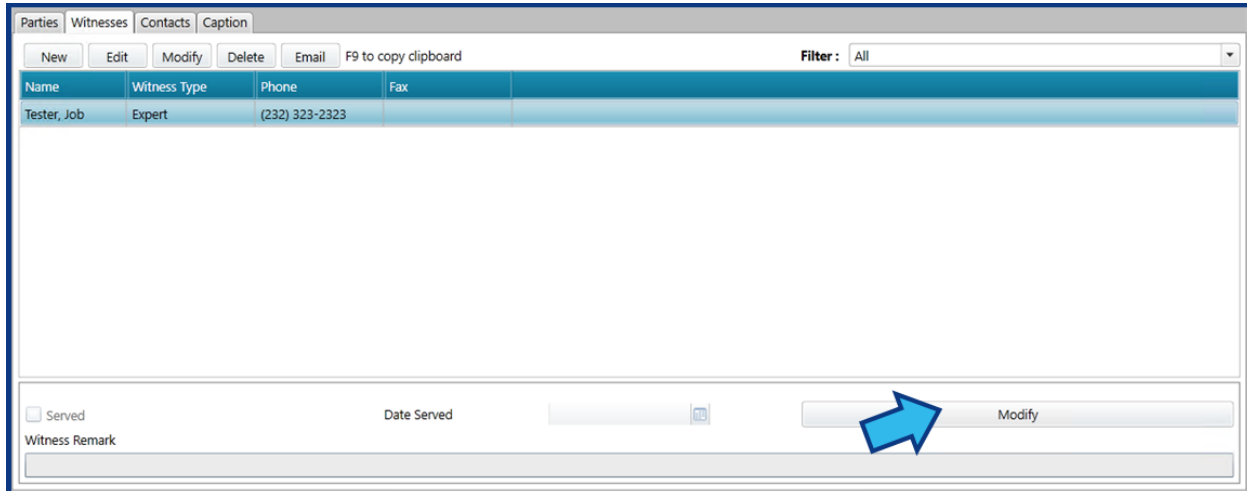
Served Date Served

Witness Remark

Your default email client will open a new email for you to edit as desired. The subject line will be pre-populated with matter information. If the person's contact record lists an email address, the **To** field will be pre-populated with their email address. When you are finished editing the email, select **Send**. A record of any emails sent in this way will be maintained in the **Documents** tab of the **Attachments** view for the matter.

Add or Edit Remark for Witness

To add or edit the remark for a witness, first select the individual so that it appears highlighted in blue. Next, select the **Modify** button near the bottom.

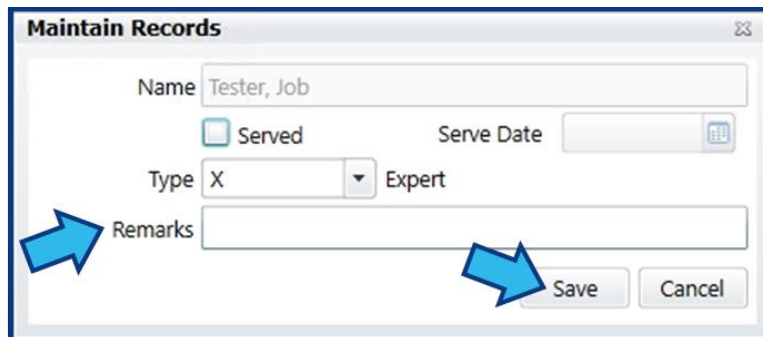


The screenshot shows a software window titled "Parties" with tabs for "Parties", "Witnesses", "Contacts", and "Caption". Below the tabs are buttons for "New", "Edit", "Modify", "Delete", and "Email", along with the text "F9 to copy clipboard". A "Filter" dropdown menu is set to "All". A table with the following columns is visible:

Name	Witness Type	Phone	Fax
Tester, Job	Expert	(232) 323-2323	

The row for "Tester, Job" is highlighted in blue. Below the table, there is a "Witness Remark" field and a "Date Served" field. A blue arrow points to the "Modify" button at the bottom right of the window.

In the **Maintain Records** window that appears, enter or edit the **Remarks** field and then select **Save**.



The screenshot shows a "Maintain Records" dialog box. The "Name" field contains "Tester, Job". There is a "Served" checkbox and a "Serve Date" field. The "Type" dropdown menu is set to "Expert". The "Remarks" field is empty and highlighted with a blue arrow. The "Save" and "Cancel" buttons are at the bottom right, with "Save" also highlighted by a blue arrow.

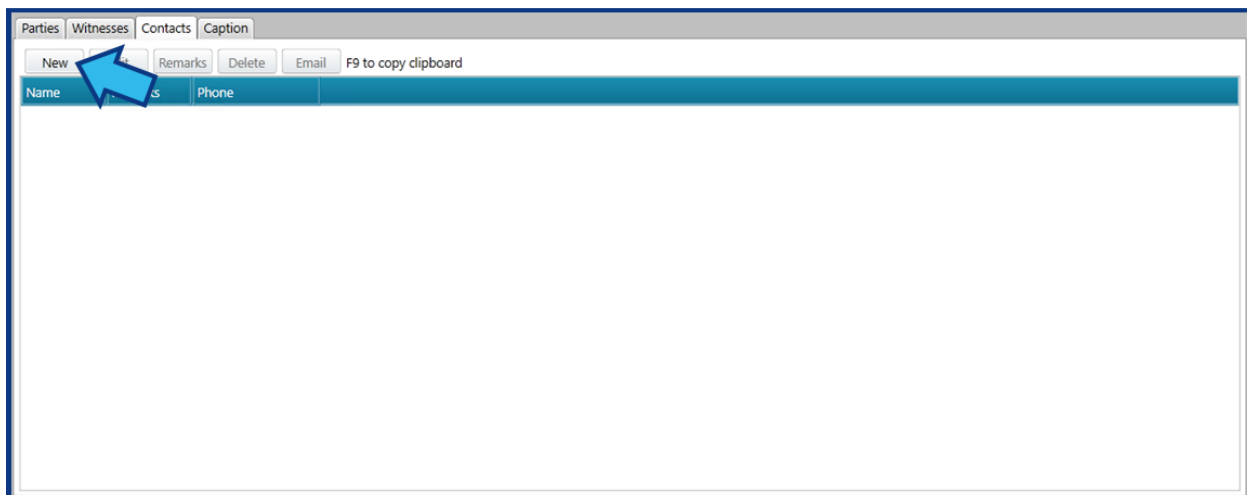
Contacts Tab

Contents:

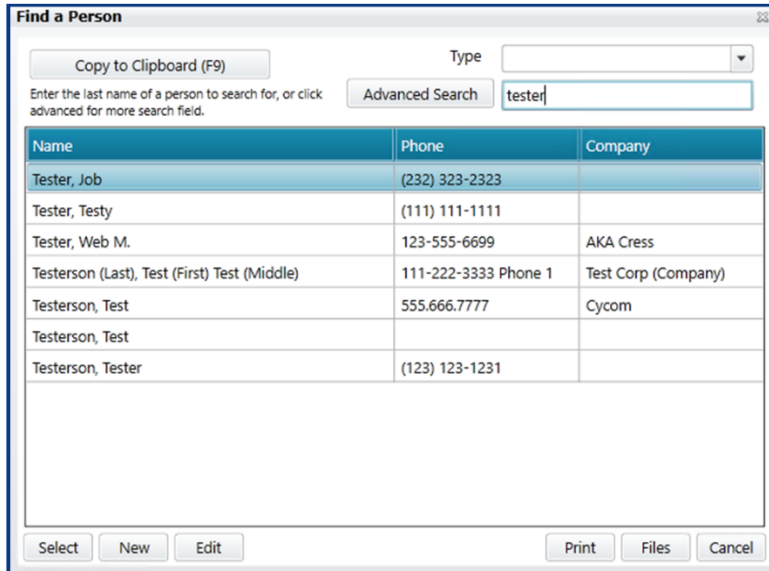
- [Add Contact](#)
- [Edit Contact](#)
- [Add or Edit Remark for Contact](#)
- [Delete Contact](#)
- [Email Contact](#)

Add Contact

To add a new contact to a matter, select **New** on the **Contacts** tab.



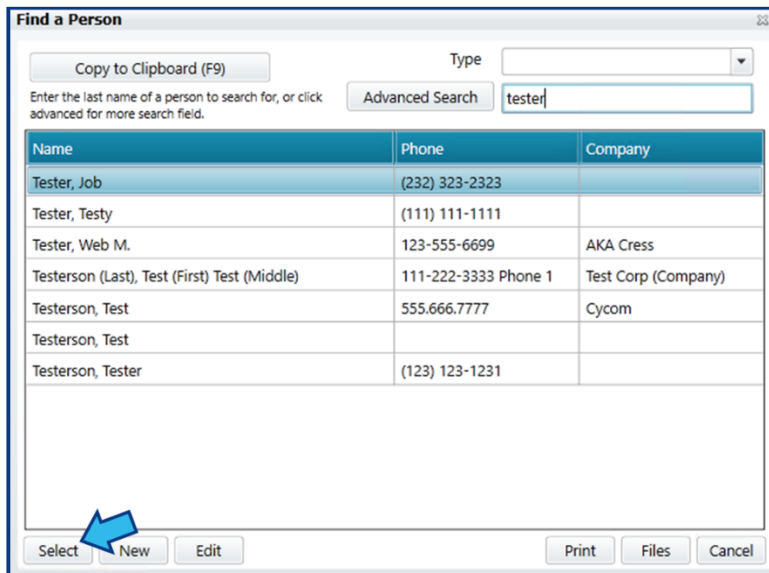
Locate the person in the **Find a Person** window that appears. Enter the person's last name in the search field to the right of the **Advanced Search** button. If a search reveals the person is not already identified in **CLW**, you will need to add them. To add a person, select **New** in the bottom left corner. Enter the known information for the person and then select **Save**. Now the person will appear in the search list.



The screenshot shows the 'Find a Person' window with the search term 'tester' entered. The search results are displayed in a table with columns for Name, Phone, and Company.

Name	Phone	Company
Tester, Job	(232) 323-2323	
Tester, Testy	(111) 111-1111	
Tester, Web M.	123-555-6699	AKA Cress
Testerson (Last), Test (First) Test (Middle)	111-222-3333 Phone 1	Test Corp (Company)
Testerson, Test	555.666.7777	Cycom
Testerson, Test		
Testerson, Tester	(123) 123-1231	

Once you have found the person, highlight their name in the list and press **Select**.

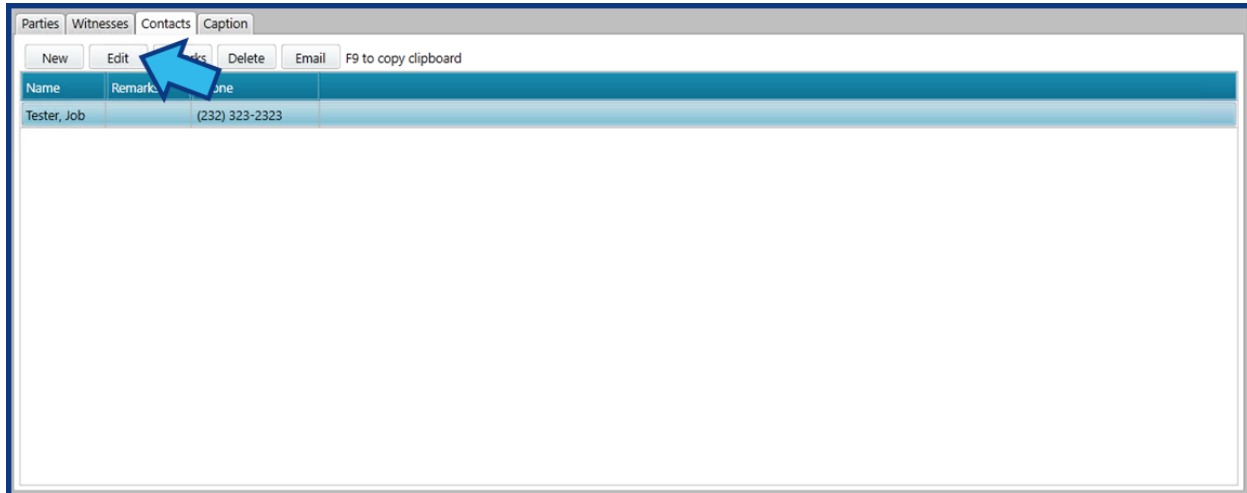


The screenshot shows the 'Find a Person' window with the search term 'tester' entered. The search results are displayed in a table with columns for Name, Phone, and Company. A blue arrow points to the 'Select' button at the bottom left of the window.

Name	Phone	Company
Tester, Job	(232) 323-2323	
Tester, Testy	(111) 111-1111	
Tester, Web M.	123-555-6699	AKA Cress
Testerson (Last), Test (First) Test (Middle)	111-222-3333 Phone 1	Test Corp (Company)
Testerson, Test	555.666.7777	Cycom
Testerson, Test		
Testerson, Tester	(123) 123-1231	

Edit Contact

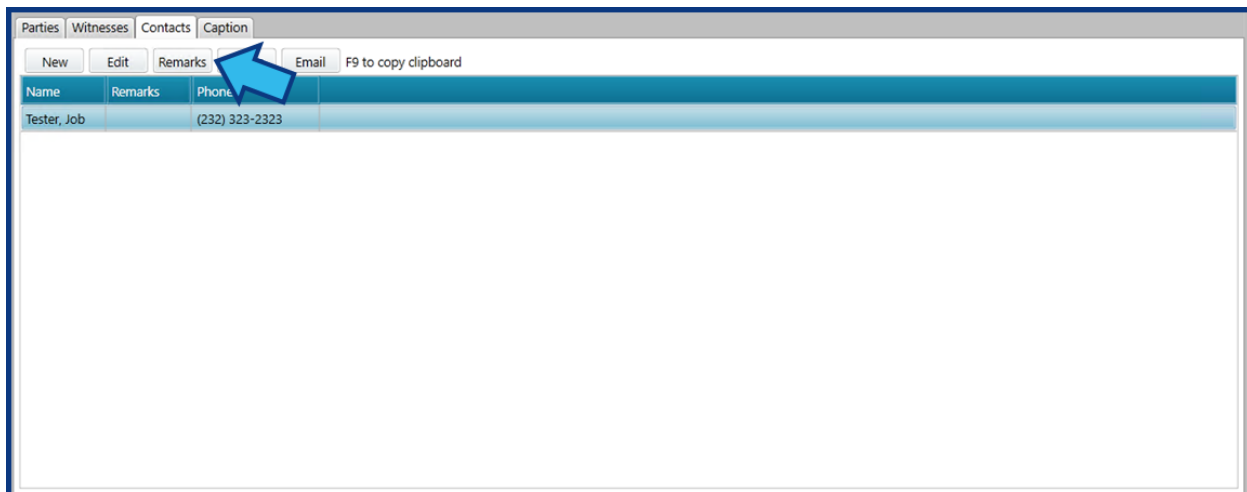
To edit a contact's contact record, first select the individual so that it appears highlighted in blue. Next, select the **Edit** button.



Edit the desired fields in the contact record and then select **Save**.

Add or Edit Remark for Contact

To add or edit the remark for a contact, first select the individual so that it appears highlighted in blue. Next, select the **Remarks** button.

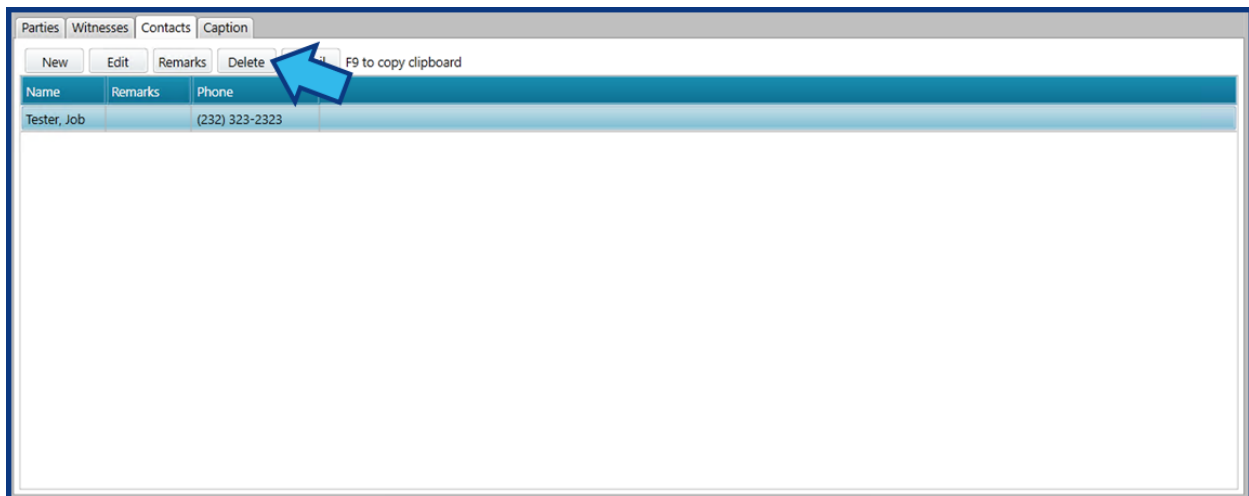


In the **Remarks** window that appears, enter or edit the **Remarks** field and then select **Ok**.

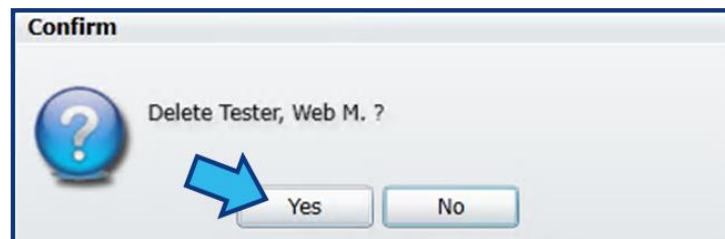


Delete Contact

To delete a contact from a matter, first select the individual so that it appears highlighted in blue. Next, select the **Delete** button.

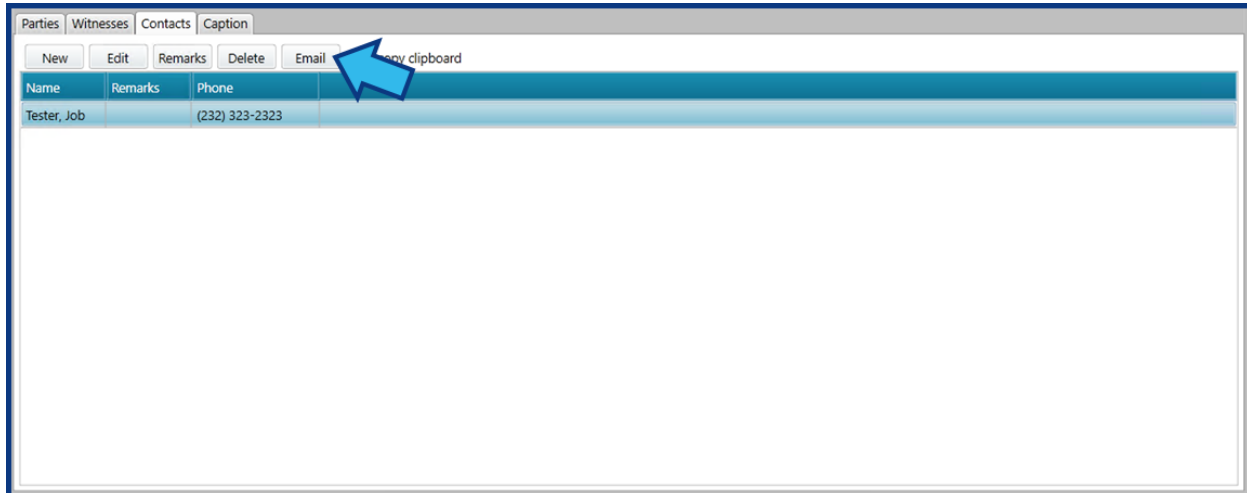


A **Confirm** window will appear. Select **Yes** to delete the individual from the matter. NOTE: Deleting an individual this way does not delete the contact record in **CLW**. It only removes their association to this matter.



Email Contact

To email a contact, first select the individual so that it appears highlighted in blue. Next, select the **Email** button.



Your default email client will open a new email for you to edit as desired. The subject line will be pre-populated with matter information. If the person's contact record lists an email address, the **To** field will be pre-populated with their email address. When you are finished editing the email, select **Send**. A record of any emails sent in this way will be maintained in the **Documents** tab of the **Attachments** view for the matter.

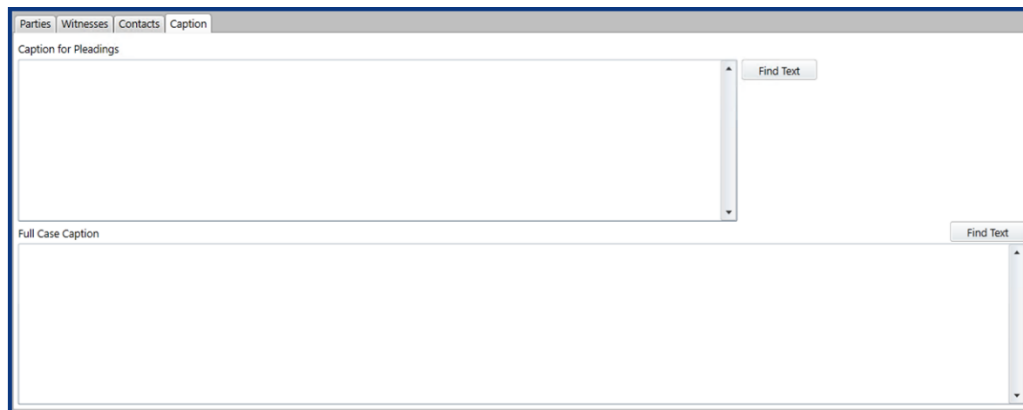
Caption Tab

Contents:

- [Add Captions](#)
- [Search Caption Text](#)

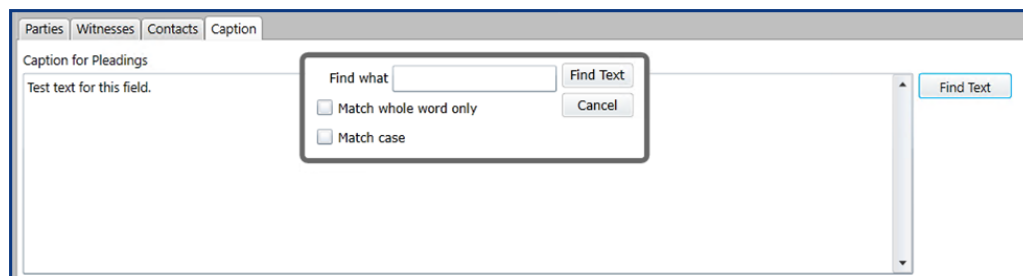
Add Captions

Caption for Pleadings and **Full Case Caption** are unlimited text fields in which you can directly enter or edit text. These fields can be used as a quick way to find and copy text to be pasted into other documents or emails.

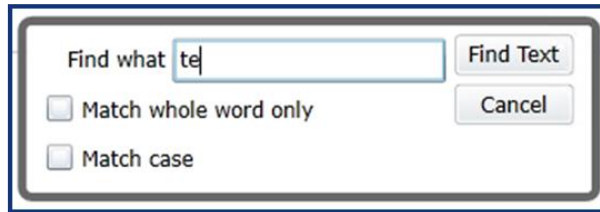


Search Caption Text

To quickly search the caption text in either the **Caption for Pleadings** or **Full Case Caption** fields, select the appropriate **Find Text** button to the right of the field you want to search.



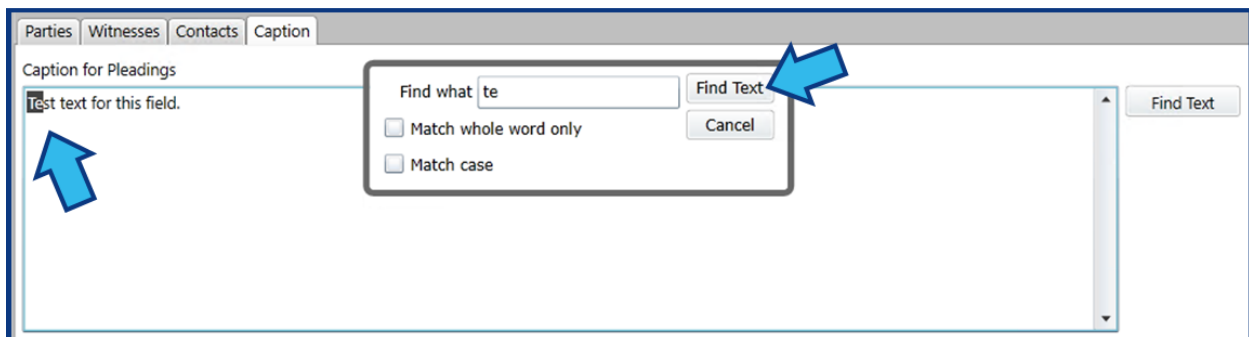
In the window that appears, enter the text for which you are searching in the **Find what** text field.



A dialog box titled "Find Text" with a "Find what" text field containing "te". Below the text field are two checkboxes: "Match whole word only" and "Match case", both of which are unchecked. To the right of the checkboxes are two buttons: "Find Text" and "Cancel".

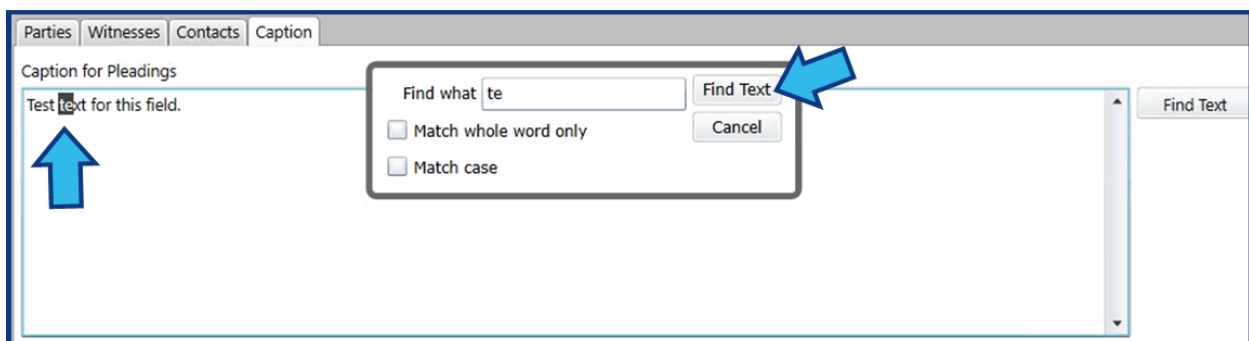
If you want to only find whole words, place a check in the box beside **Match whole word only**. If you want to only find text that matches the case you have typed in the **Find what** field, place a check in the box beside **Match case**.

Select the **Find Text** button. If the text you entered is found, the first occurrence will be highlighted in the caption field.



A screenshot of a software window with tabs for "Parties", "Witnesses", "Contacts", and "Caption". The "Caption" tab is active, showing a text field with the text "Caption for Pleadings" and "Test text for this field." The text "Test" is highlighted. A "Find Text" dialog box is overlaid on the window, with a blue arrow pointing to the "Find Text" button in the dialog. Another blue arrow points to the "Test" text in the caption field. A "Find Text" button is also visible in the top right corner of the window.

If you want to see the next occurrence, select the **Find Text** button in the **Find Text** window again.



A screenshot of the same software window as above. The "Find Text" dialog box is still open, and a blue arrow points to the "Find Text" button in the dialog. Another blue arrow points to the "Test" text in the caption field, which is now highlighted. The "Find Text" button in the top right corner of the window is also visible.

If there are no further occurrences or the text you are searching for is not found at all, you will be prompted with a **Find text** window alerting you nothing was found. Select **OK** to dismiss the **Find text** window.

