

Managing contacts can be done from multiple places throughout **CLW**. In fact, contact management options to create new contacts and edit existing ones are available everywhere contacts can be applied or searched. Deleting contacts must be done by someone with access to the **System Management** module, such as a **System Administrator**.

Contact management can be done without first accessing a matter by selecting either the **Find People** icon in the **Global Toolbar**, or else opening **System Management** and selecting **People** from the **Files** tab of the **Global System** view.

Otherwise, contact management can be done whenever a **Find a Person** window is available.

The steps in this article will use the **Find People** option for creating and editing, which should be available to all users. The same steps for creating and editing contacts apply regardless of the approach used.

NOTE: It is important to understand that “**contact**” in this article refers to any person or organization maintained in **CLW**, excluding users. In some modules, such as **Litigation**, a “**Contact**” has specific meaning to distinguish it from a “**Party**”, “**Related Party**”, or “**Witness**”. All of these people types are considered **CLW** contacts for the purpose of this article.

Contents:

- [**Create New Contact**](#)
- [**Edit Contact**](#)
- [**Delete Contact**](#)

Create New Contact

There are four steps to complete this task:

1. [Open People Search Criteria](#)
2. [Search for Contact](#)
3. [Select New](#)
4. [Enter Contact Details and Save](#)

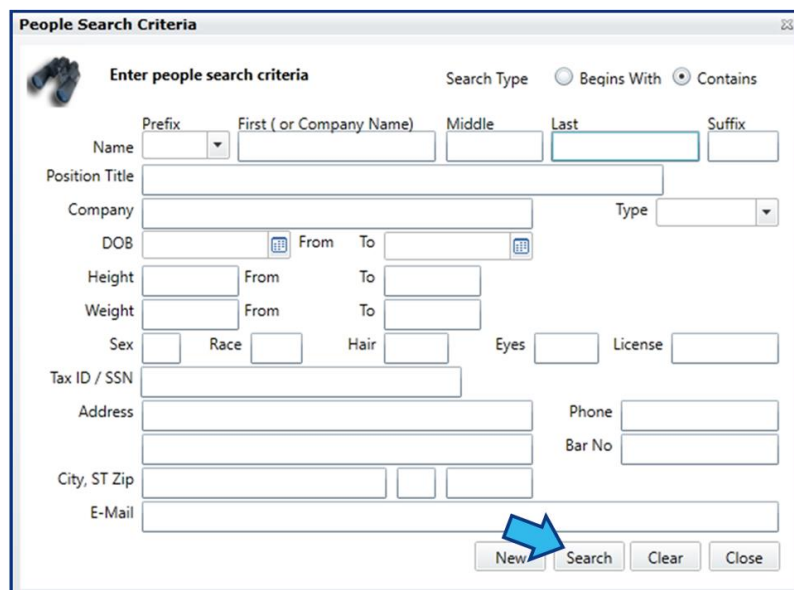
Step 1. Open People Search Criteria

The **People Search Criteria** window can be accessed numerous ways. Most directly, select the **Find People** icon on the **Global Toolbar**.



Step 2. Search for Contact

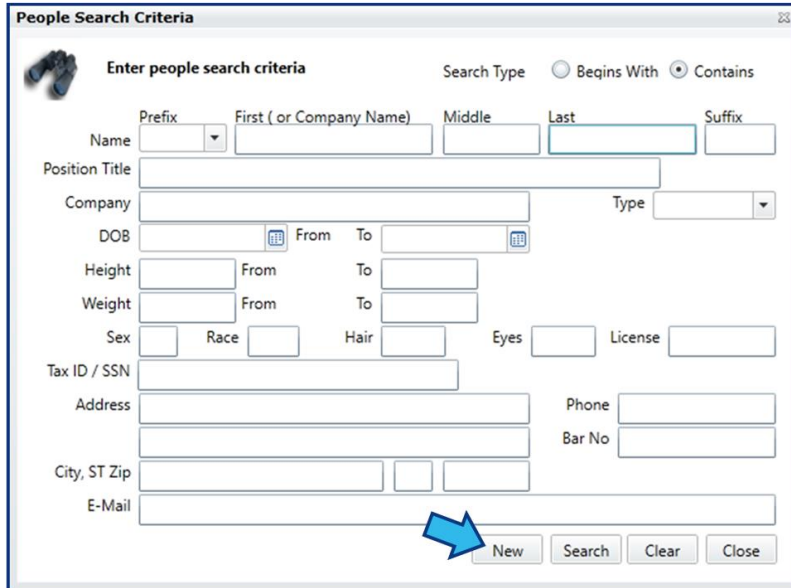
CLW Best Practices states to always search for a contact first, before creating a new one. Consider in your search that the contact's information may have been entered differently, or even incorrectly. Perhaps a nickname has been used, or perhaps the last name was misspelled. Enter the contact's name and/or other information to search for the contact and then select **Search**. Once you are satisfied a record does not already exist for the new contact, move to **Step 3**. Remember that multiple contacts may share the same name and you may need to consider other information to confirm a contact's identity.



The image shows the 'People Search Criteria' window. It contains several input fields for search criteria: Name (with Prefix, First, Middle, Last, and Suffix sub-fields), Position Title, Company, Type, DOB, Height, Weight, Sex, Race, Hair, Eyes, License, Tax ID / SSN, Address, Phone, Bar No, City, ST, Zip, and E-Mail. At the bottom right, there are four buttons: 'New', 'Search', 'Clear', and 'Close'. A blue arrow points to the 'Search' button.

Step 3. Select New

Once you are sure the contact needs to be added, select **New**.



People Search Criteria

Enter people search criteria Search Type Begins With Contains

Name Prefix First (or Company Name) Middle Last Suffix

Position Title

Company Type

DOB From To

Height From To

Weight From To

Sex Race Hair Eyes License

Tax ID / SSN

Address Phone

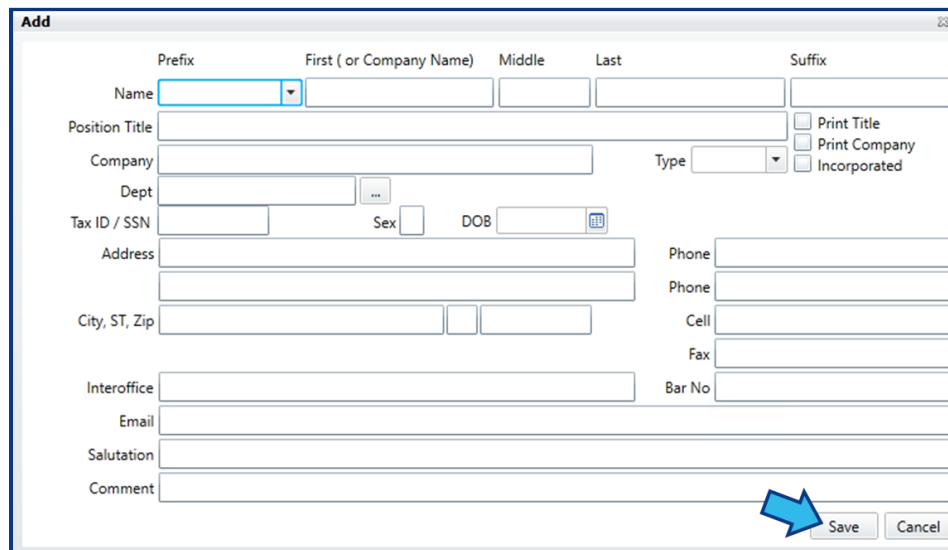
 Bar No

City, ST Zip

E-Mail

Step 4. Enter Contact Details and Save

In the **Add** window, enter the known information for the contact and select **Save**. Now the contact can be selected from a **Find a Person** window or found through a **People Search Criteria** search.



Add

Prefix First (or Company Name) Middle Last Suffix

Name

Position Title Print Title

Company Type Print Company

Dept ... Incorporated

Tax ID / SSN Sex DOB

Address Phone

 Phone

City, ST, Zip Cell

 Fax

Interoffice Bar No

Email

Salutation

Comment

Edit Contact

There are four steps to complete this task:

1. [Open People Search Criteria](#)
2. [Search for Contact and Highlight](#)
3. [Select Edit](#)
4. [Edit Contact Details and Save](#)

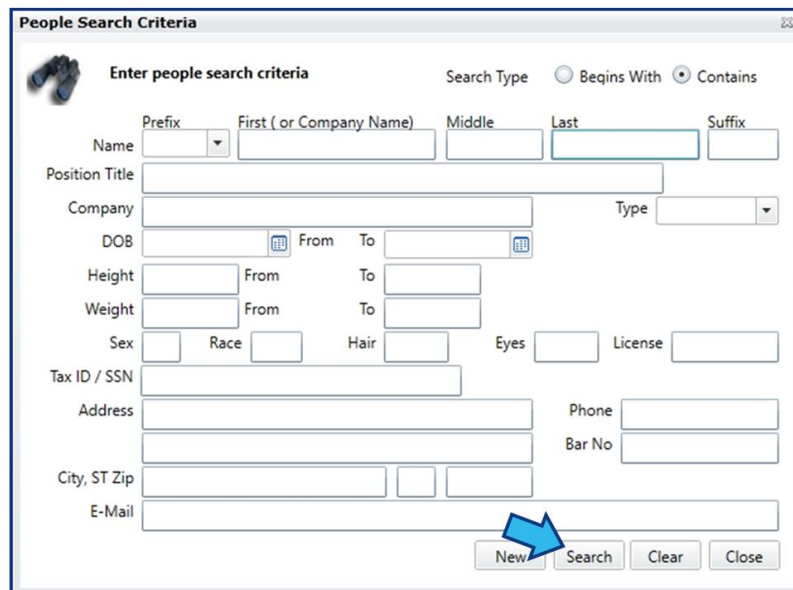
Step 1. Open People Search Criteria

The **People Search Criteria** window can be accessed numerous ways. Most directly, select the **Find People** icon on the **Global Toolbar**.



Step 2. Search for Contact and Highlight

Consider in your search that the contact's information may have been entered differently, or even incorrectly. Perhaps a nickname has been used, or perhaps the last name was misspelled. Enter the contact's name and/or other information to search for the contact and then select **Search**. Remember that multiple contacts may share the same name and you may need to consider other information to confirm a contact's identity.

A screenshot of the 'People Search Criteria' window. The window title is 'People Search Criteria'. It contains a form for entering search criteria. The form includes fields for Name (Prefix, First (or Company Name), Middle, Last, Suffix), Position Title, Company, Type, DOB, Height, Weight, Sex, Race, Hair, Eyes, License, Tax ID / SSN, Address, Phone, Bar No, City, ST Zip, and E-Mail. There are also radio buttons for 'Search Type' with options 'Begins With' and 'Contains'. At the bottom right, there are four buttons: 'New', 'Search', 'Clear', and 'Close'. A blue arrow points to the 'Search' button.

Once you have found the contact, select them by single left-clicking their name in the list.

Find a Person x

Copy to Clipboard (F9)

Name	Phone	Company
test, test		
test, test t	(111	
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	
ZZZTESTERTON TERRA	555555555	
ZZZTESTERTON TERRA	6085551212	

Edit New Print Files Return to Search

Step 3. Select Edit

Select **Edit** to open the **Edit Party** window.

Find a Person x

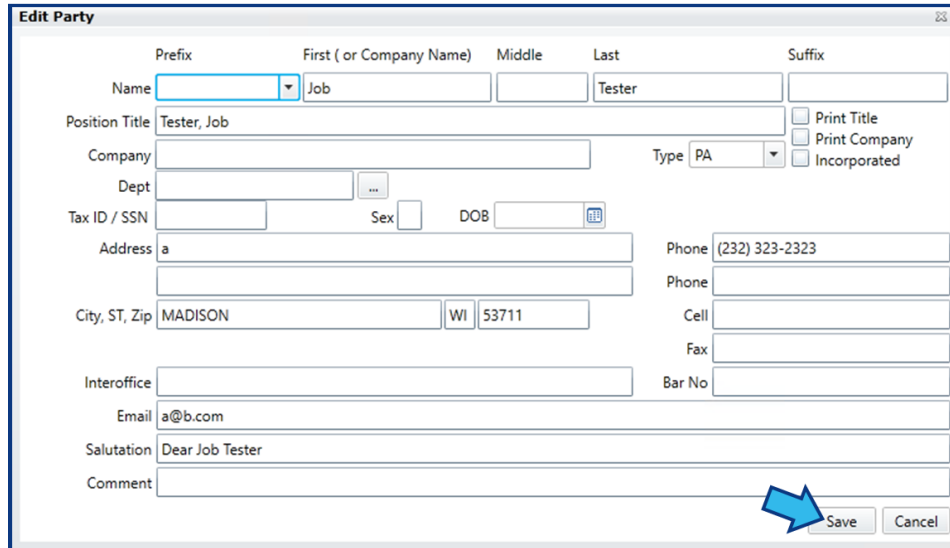
Copy to Clipboard (F9)

Name	Phone	Company
test, test		
test, test t	(111	
Tester, Job	(232) 323-2323	
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Testerson, Test	555.666.7777	Cycom
Testerson, Test		
Testerson, Tester	(123) 123-1231	
ZZZTESTERTON TERRA	555555555	
ZZZTESTERTON TERRA	6085551212	

Edit New Print Files Return to Search

Step 4. Edit Contact Details and Save

Edit any of the fields needed in the **Edit Party** window and when finished, select **Save** to save your edits.



The screenshot shows the 'Edit Party' window with the following fields and values:

Prefix	First (or Company Name)	Middle	Last	Suffix
	Job		Tester	
Name				
Position Title	Tester, Job			
Company				
Dept	...			
Tax ID / SSN	Sex	DOB		
Address		Phone (232) 323-2323		
		Phone		
City, ST, Zip		WI	53711	
		Cell		
		Fax		
Interoffice		Bar No		
Email		a@b.com		
Salutation		Dear Job Tester		
Comment				

At the bottom right, there are 'Save' and 'Cancel' buttons. A blue arrow points to the 'Save' button.

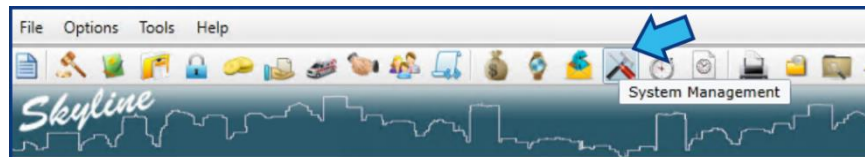
Delete Contact

There are five steps to complete this task:

1. [Open System Management](#)
2. [Select People](#)
3. [Search for Contact and Highlight](#)
4. [Review Contact's Associated Files](#)
5. [Select Delete and Confirm](#)

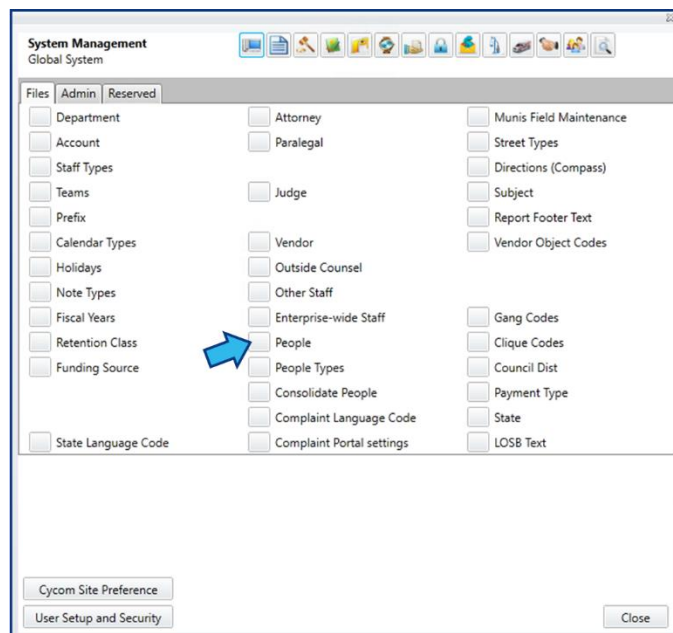
Step 1. Open System Management

Select the **System Management** icon from the **Global Toolbar**.



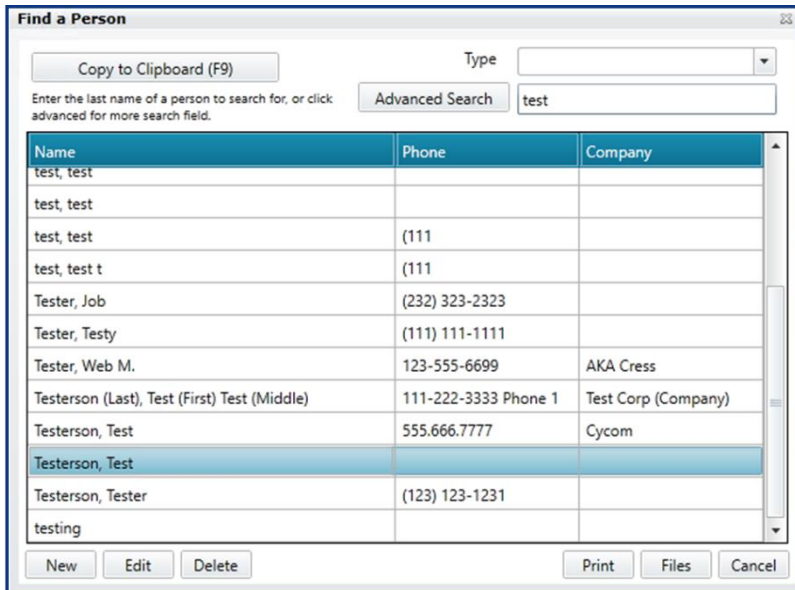
Step 2. Select People

On the **Files** tab of the **Global System** view, which should be the default view, select **People** from the center column.



Step 3. Search for Contact and Highlight

Enter the contact name in the **Search** field, find the contact, and then highlight them by single left-clicking the name in the list.



Find a Person

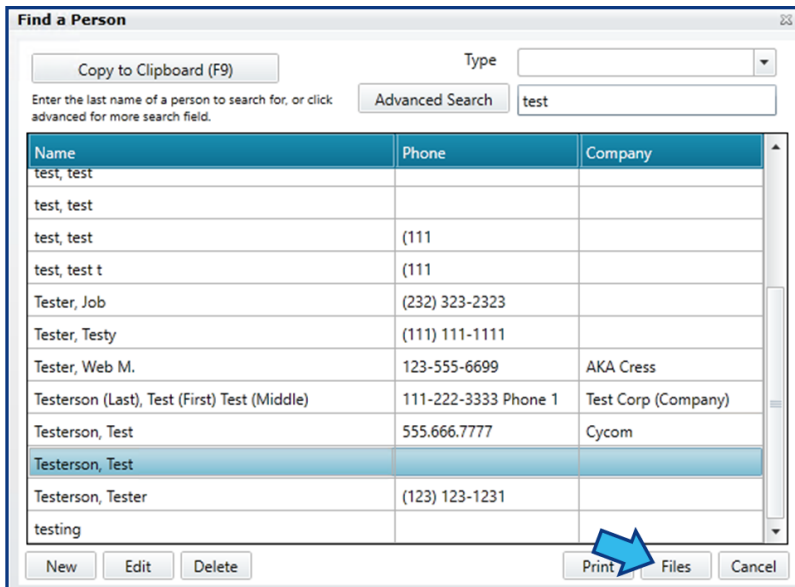
Copy to Clipboard (F9) Type

Enter the last name of a person to search for, or click advanced for more search field.

Name	Phone	Company
test, test		
test, test		
test, test	(111	
test, test t	(111	
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	
testing		

Step 4. Review Contact's Associated Files

CLW Best Practices states to never delete a contact that is associated with one or more files. Doing so can create problems in the database. To ensure the contact you are about to delete is not associated with any matters, select **Files**.



Find a Person

Copy to Clipboard (F9) Type

Enter the last name of a person to search for, or click advanced for more search field.

Name	Phone	Company
test, test		
test, test		
test, test	(111	
test, test t	(111	
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	
testing		

If the contact is associated with any matters, a list of those matters will appear. **DO NOT** delete this contact.

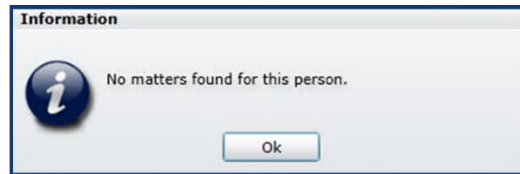
Matters For Job Tester (2)

Below is a list of the matters on which this person was found. Date Sort

Staff	Matter	Module	Title	Date	Dept	Status
PM	L20-0082	LI	Tester, Job	4/28/2020		O
WAB	L20-0015	LI	Test 4806 cross ref 2	1/27/2020	ARL	O

Print Close

Otherwise, you will be prompted that no records were found. If you receive this prompt, it is safe to delete the contact.



Step 5. Select Delete and Confirm

Only proceed with this step once you have confirmed from **Step 4** that the contact is not associated with any matters. Select **Delete** and then select **Yes** to confirm you wish to delete the contact.

Find a Person

Copy to Clipboard (F9) Type

Enter the last name of a person to search for, or click advanced for more search field. Advanced Search

Name	Phone	Company
test, test		
test, test		
test, test	(111)	
test, test t	(111)	
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	
testing		

New Edit Delete Print Files Cancel

