



# OnePlace User Guide

LIGHTNING

2018

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## Running a Function

Below are the high-level steps of running an event (referred to as a Function in OnePlace) with full details on each step listed further below:

1. Create a new function
2. Populate the invitee list (you can send a link to users to populate)
3. Update the invitees on the function
4. Send the invitation (via your emarketing tool)
5. Update Attendance
6. Close and rollup costs

### Creating a new function

1. Select the *Functions* tab > click *New*
2. Complete the relevant details about your event – these can also be edited at a later stage
  - a. *Capacity* - the number of places remaining will automatically be calculated based on the number of acceptances against the capacity entered here
  - b. *Total cost* – will be used to show the cost per head once the event has finished and attendance is recorded
3. List Management
  - a. A list will hold the invitees for your event. A list will automatically be created with the same name as the function. Alternatively, you can select an existing list from within OnePlace
  - b. *Communication Preference Exclusions* – Contacts may have opted out of receiving certain types of communications, select the exclusion(s) which is relevant to the type of function you're running e.g. *No Event Invitations*
  - c. *Anti-List* – An anti-list is used to exclude contacts from receiving communications such as competitors. The default anti list will be used unless another is selected here. The default list is called *z-Master Anti List*
4. Function Overview
  - a. *Description* – can be used for general notes on the purpose of the function
  - b. *Areas of Interest* – allows you to record the Interests which relate to this event. You can select multiple areas of interest: use Shift key to select adjacent values or Ctrl to select non-adjacent values
5. Click *Save*

#### Tips:

- Contacts with the *Unsubscribe All Marketing Communications* selected will automatically be excluded from receiving the invitation

#### Admin Tips:

- It's possible to configure OnePlace to allow up to 5 lists to be linked to a publication or function - best practice is to limit this to 1 for better targeting / list management

- Default *Communication Preference Exclusions* can be set so the user creating the function will not need to select the exclusion each time. E.g. All functions can be set to exclude contacts with *No Event Invitations* selected

## Populating the invitee list

Lists are used to group contacts together. A list can then be linked to a Function or a Publication.

A list can be populated by Marketing or the end users directly. The status of a contact will determine if it *can* be added to a list. See the [Contact Status](#) section below for details.

## Adding contacts via Manage Contacts button

Contacts can be managed directly on the list:

1. Within the relevant list > click **Manage Contacts** in the top right corner and select the relevant tab:
  - a. **Contact List Views** – shows the predefined views (searches) and allows you to create a new view
  - b. **Custom Filter** – search by contact field e.g. Job Title, Company Name or by relationship type/related contacts e.g. all contacts know by a specific user. Enter criteria and click the *Search contacts* button
  - c. **Other lists** – select contacts from another list (e.g. the Contributor List)
  - d. **Email Search** – if you have a list of contacts (e.g. in Excel), you can copy and paste the email addresses here and OnePlace will match the contacts already in OnePlace. Any which are not matched can then be manually added/imported to the system and the list
2. Select the contact(s) you want to contribute by ticking the box to the left of their name
3. At the bottom of the tab select the user you are adding contacts on behalf of:

New contacts will be recorded as added by

4. Click *Save Contact Selection*

Manage List Contacts  
Construction Seminar

Existing Contacts | Contact List Views | Custom Filter | Other Lists | Email Search

Save Contact Selection | Add All Contacts | Remove All Contacts | Cancel

Contact List View: My Contacts | Edit | Create New View

Show: All matching contacts (existing list contacts have a blue background)

| Name   | Company Name | Job Title   | Email                            | Phone                | Mobile | Mailing City  | Mailing Country          |
|--|--------------|---|----------------------------------|----------------------|--------|---------------|--------------------------|
| <input type="checkbox"/> Angus Thompson              | OnePlace     | COO   | angus.thompson@oneplace.global   |                      |        | San Francisco | United States of America |
| <input checked="" type="checkbox"/> Vijay Motiramani | OnePlace     | Vice President Consulting Services and Customer Success | vijay.motiramani@oneplace.global | +44 (0) 7748 985 960 |        | London        | United Kingdom           |

<< First | < Previous | 1 / 1 | Next > | Last >>

New contacts will be recorded as added by: Onaplace UAT

## Tips:

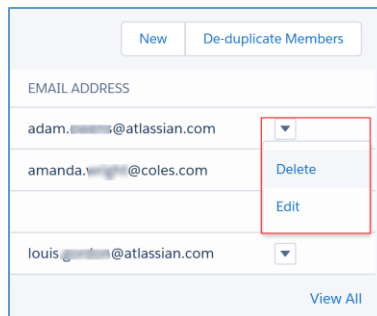
- At the bottom of each tab you can select the user you are adding contacts on behalf of:

New contacts will be recorded as added by

- My Contacts are those which you have a knows relationship recorded – this is created when you add a new contact to OnePlace or by clicking the **I know** button on a contact record which already exist in the system
- Contacts marked in blue are already in the list. Please note that by unticking them and clicking save, they will be removed from the list
- You can filter the list using the Show drop-down to view Contacts not already in the list
- You can also sort the information by the column header (e.g. company name)

#### Deleting contacts from a list:

1. On the list – click the down arrow to the right of the contact > select *Delete*; or



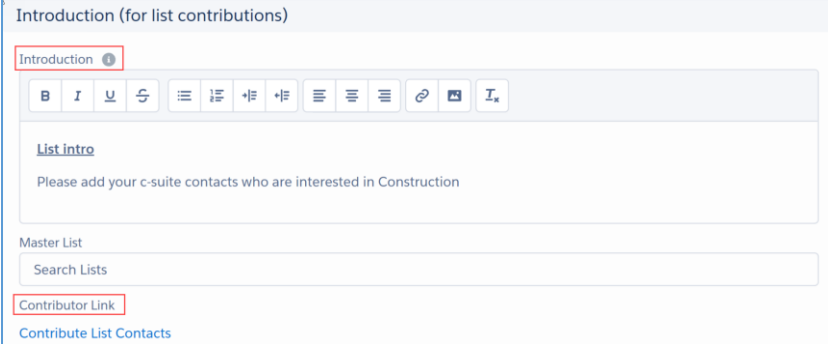
2. To delete multiple contacts > click *Manage Contacts*
3. On the *Existing Contacts* tab, tick the contacts to be removed > click *Remove Selected Contacts*

## Adding contacts via the Contributor Link

**NOTE:** Please note that this is new functionality and will be refined over new releases of OnePlace.

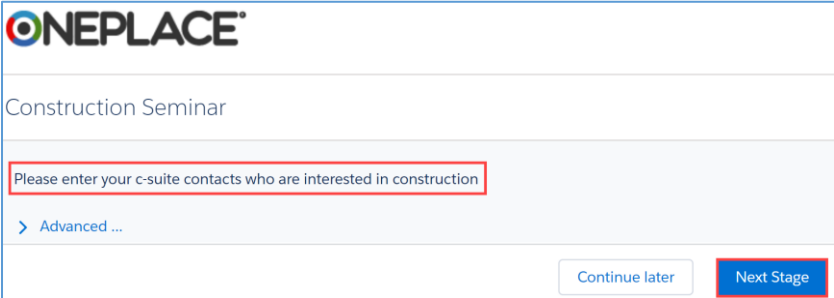
There is a link to allow end user to contribute to the list – *Contribute List Contacts* - this link is available when creating, editing or viewing a list so you can grab it any time. You can send the link to your end users and it will guide them through the process of adding their contacts to the list

Any details entered into the *Introduction* box when editing the list will display to your end user when they're using the Contributor Link. You can use it to specify the type of contacts the users should add

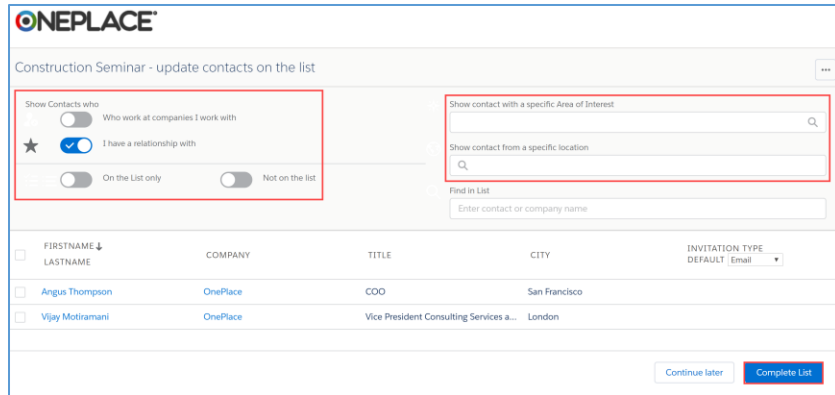


If you want end users to add to the list, you can send the Contributor Link. The link will guide the users through a process to contribute their contacts:

1. The introduction entered when the list was created will display here > click *Next Stage*



2. Here you can show and select contacts:
  - a. *Who work at companies I work with* – contacts you are linked to via a matter - where you are a matter contact for the contact's company i.e. working attorney, supervising attorney or billing attorney
  - b. *I have a relationship with* – contacts where you have a knows relationship recorded
  - c. *On the List only*
  - d. *Not on the list*



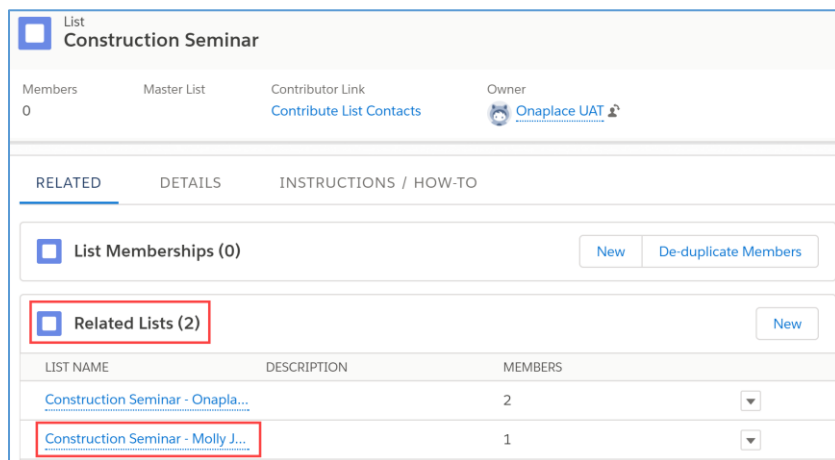
3. You can also filter the results by *Area of Interest* and *Location*
4. Select the contact you want to add to the list by ticking the box to the left of their name
5. You can search for contacts or companies within the list using the *Find in List* box
6. Click *Complete List*

**Tips:**

- Contacts with a tick are already in the list. Please note that by unticking them and clicking save, they will be removed from the list
- You can also sort the information by the column headers (e.g. First Name or Last Name)

**NOTE:** Contacts added via the Contributor Link will be added to a separate list which is automatically created for each contributor. This list will be named *[original list name] – [contributor name]* e.g. *Construction Seminar – Helen Pratley*.

Each list of contributed contacts can be viewed in the *Related Lists* section of the original list. To view, edit or add extra contacts to a list you can click the related list name:



Click *Continue List Contribution* to continue to add or remove contacts to the contributor list:



List  
Construction Seminar - Onaplace UAT

Members: 2

Master List: [Construction Seminar](#)

Contributor Link: [Continue List Contribution](#)

Owner: [Onaplace UAT](#)

## Merging contributor lists

To combine all the contributor lists:

1. Click the *Merge lists* tab found in the details tab
2. Select the list(s) to merge and click the ► to move the lists to the right-hand column. Use *Shift* to select multiple lists
3. When all relevant lists have been selected, click **Merge Lists...**

COMBINE / MERGE MULTIPLE LISTS

Search for list

Only related lists

\* Select Lists to Merge

Available Lists

Lists being merged

Construction Seminar - Onaplace UAT (1)

Construction Seminar (3)

Construction Seminar - Molly J. (6)

Merge Lists...

4. This will create another new list called *Merge target – [original list name]*
5. Click **Merge Lists Now**

Merge process commenced successfully, for large lists the process will continue in the background. Open the merge target list [here](#) ✕

Working on behalf of – when working on behalf of another user the contributor list will be created for that user, not yourself.

## Contact Status

Each contact will have a status assigned – when a new contact is created the status is automatically set to Current. The following status options are available:

- Current
- Dormant
- On Leave
- Retired
- Archived
- Deceased

When searching for contacts to add to a list, only those marked as *Current* will display in the results.

## Updating the invitees on the function

When you're ready to invite the contacts (via your emarketing tool), you must pull the contacts from the list into the function:

1. Go to the function > select *Update Invitees*



2. This will display the contacts from the list in the *Invitees* section of the Function.
3. Click *View All* to see the full list and any exclusion reasons for the contacts. If an exclusion reason is shown, the contact will automatically not receive the invitation – see [Exclusion Reasons](#) section below for more details.

**Tip:** Exclusion reasons are checked as contacts are initially brought into the function. If you update the invitees before you are ready to send the invitation, any exclusions set after contacts are added will not be honoured.

## Update Attendance

Once the invitation has been sent via your emarketing tool, the RSVP information will filter back into OnePlace automatically – you can view this information on the *Function > Invitees* section. [Conditional – firm using an integrated emarketing tool].

After the event, attendance can be recorded in OnePlace so that the users are able to see who did/didn't attend. Your emarketing tool can help to automate this process using a check in feature to mark attendance as contacts arrive at the event. Alternatively, you can manually update the attendance field using one of the options below:

### Invitee Multiple Updates button

1. Go to the function > select *Invitee Multiple Updates*
2. Tick the contacts which attended the event (information is sorted by last name)
3. Select *Yes* from the *Attendance* drop-down list > click *Save*
4. Tick the contacts which did not attend (but were due to)
5. Select *No Show* from the *Attendance* drop-down list > click *Save*
6. And so on for any other attendance you wish to record
7. Click *Return* to go back to the function screen

### Invitee Updates tab

**NOTE:** Please note that this is new functionality and will be refined over new releases of OnePlace.

1. Go to the function > select the *Invitee Updates* tab

2. You can filter the contacts by any of the available fields > click the *Advanced filter options* link to see all options
3. Enable *Update Mode*

4. Tick the contacts you wish to update
5. Select the relevant Attendance

6. click *Save Updates*

## Deactivate the function and close and rollup costs

After the event has finished and all attendance has been recorded, enter the final costs for the event:

1. Go to the function > select *Edit*
2. Untick *Active* – this will stop the function from displaying within your emarketing tool
3. Enter the *Total Cost* of the event
4. Tick *Close and Rollup Costs*
5. Click *Save*

The screenshot shows the 'Edit Construction Seminar' form. The 'Total Cost' field is highlighted with a red box, and the 'Close and Rollup Costs' checkbox is also highlighted with a red box. The 'Cost Per Contact' field shows '\$0.00'. Other fields include 'Function Website', 'Function Role' (set to 'External'), 'Catering Required', 'Has Survey?', 'Office', and 'Language' (set to '--None--'). Buttons for 'Cancel', 'Save & New', and 'Save' are at the bottom.

This will take the final cost per attendee and include the details in the *Activity Summary* for each relevant contact.

| Activity Summary      |                        |
|-----------------------|------------------------|
| Events Invited YTD    | Seminars Invited YTD   |
| 0                     | 0                      |
| Events Attended YTD   | Seminars Attended YTD  |
| 0                     | 0                      |
| Cost All Events YTD   | Cost All Seminars YTD  |
| \$0.00                | \$0                    |
|                       | RSVP Percentage YTD    |
|                       | 0.00%                  |
| Total Events Invited  |                        |
| 0                     |                        |
| Total Events Attended | Total Seminars Invited |
| 0                     | 0                      |

## Exclusion Reasons

You may see the following exclusion reasons when viewing invitees on a function or subscribers on a publication:

The presence of the exclusion reason will be honoured by the integrations that OnePlace has with emarketing solutions such as Vuture and Concep. These solutions will stop these contacts from receiving the publication or an invitation.

| <b>Exclusion Reason</b>                   | <b>Function or Publication</b> | <b>Meaning</b>  |
|---|--------------------------------|---|
| Company unsubscribed from all mailouts    | Publication                    | Company has specified that we cannot send publications to any employees.<br>Can also be used for competitors  |
| Company unsubscribed from all invitations | Function                       | Company has specified that we cannot send invitations to any employees.<br>Can also be used for competitors   |
| Added to AntiList                         | Both                           | Contact has opted out of receiving this specific mailing/event  |
| Unsubscribe from all communications       | Both                           | Contact has opted out of all marketing communications   |
| Communication Preference                  |                                | Contact has selected 'No news updates' / 'No event invitations' / 'No Seminars' as applicable to the type of comms  |
| Bounced                                   | Both                           | If we have received 3 consecutive hard bounces for a contact, they will be marked as bounced and therefore excluded from receiving further communications |
| No Implied Consent                        | Both                           | [Depending on system configuration] If the contact is not marked with <i>implied consent</i> , they will be excluded                                      |
| No Expressed Consent                      | Both                           | [Depending on system configuration] If the contact is not marked as having given <i>express consent</i> , they will be excluded                           |

## Contact Preferences and Privacy Act Compliance

OnePlace has a Contact Preferences section visible on each contact (under the Details tab). This section will show the following fields:

- Implied Consent – tick box
- Implied Consent Date; or
- Express Contact Consent – tick box
- Express Consent Date;
- Communication Preferences
- Unsubscribe All Communications
- Bounced Email – tick box
- Bounce Email Reason

These fields can be updated by end users or by the contact themselves via emarketing integration. Details on each field can be found below.

Contacts can be still added to a list, function or publication even if they have an exclusion or preference recorded. The exclusion reason(s) will be displayed on the function or publication.

If an emarketing integration with Concep or Vuture is being used, only contacts without an *Exclusion Reason* will be mailed by the emarketing solution. All emarketing platforms provide an unsubscribe mechanism. These contacts should already be filtered, but this acts as a secondary filter.

### Implied Consent and Express Consent

Within Europe, data privacy laws within some countries requires either Implied Consent (based on your agreements with your clients to deliver services) or express consent (the contact has explicitly identified that they can be marketed to) before you can reach out to contacts and send them marketing communications and/or event invitations.

OnePlace can be configured to enable tracking of implied or express content. If this feature has been enabled and a contact does not have either the “Implied Contact Consent” or “Express Contact Consent” tick box checked, the system will update an Exclusion reason against the contact if the contact is included in a Publication or Function. The presence of the Exclusion reason will exclude the contact from being send the Publication or an invitation to a Function (Event) via the automated integrations with Vuture and/or Concep.

### Communication Preferences

Contacts may want to opt out of receiving specific types of communications, the following options are available:

- No mailings
- No event invitations
- No holiday cards

When creating a Function or Publication within OnePlace, you can specify which of the above exclusions apply (e.g. when creating a Function, you would want to exclude contact with *No event invitations* selected).

When a contact is added as a Function invitee or Publication subscriber, the exclusion reason *Communication Preferences* will display against any contacts who have opted out of that type of communication.

## Bounce-backs

When sending out functions and publications using OnePlace and an emarketing solution, emails that do not reach the intended recipient can be identified and the reason why the bounce occurred fed back into the contact's record:

The *Bounced Email Reason* field identifies the reason why the bounce occurred. Soft bounces usually indicate a temporary issue e.g. the contact's mailbox was full. Hard bounces usually indicate a more permanent issue e.g. the email address is incorrect, the contact has left the organisation etc.

To clean up the bounced emails:

1. Review email address for common mistakes:
  - a. Email address includes any of the following punctuation: / < > ; ,
  - b. Domain name (bit after the @ sign) is incorrect – check the email addresses of other people at the same organisation for the email format
2. If the person has left the organisation, their company email address should be deleted as it's no longer in use
3. If the email address is updated or deleted, remove the tick in the *Bounced email* box so the contacts are no longer excluded from receiving future mailings.

## Running a Publication

Below are the high-level steps of sending a publication with full details on each step listed further below:

1. Create a new publication (link the recipient list to the publication)
2. Populate the recipient list (you can send a link to users to populate)
3. Update the subscribers on the publication
4. Send the publication (via your emarketing tool)

### Creating a new publication

1. Select the *Publication* tab > click *New*
2. Complete the relevant details about your publication – these can also be edited at a later stage
3. List Management
  - a. A list will hold the recipients of the mailing. A list will automatically be created with the same name as the publication. Alternatively, you can select an existing list from within OnePlace
  - b. *Communication Preference Exclusions* – Contacts may have opted out of receiving certain types of communications, select the exclusion(s) which is relevant to the type of publication you're sending e.g. *No Newsletters*
  - c. *Anti-List* – An anti-list is used to exclude contacts from receiving communications such as competitors. The default anti list will be used unless another is selected here. The default list is called *z-Master Anti List*
4. Click *Save*

#### Tips:

- Contacts with the *Unsubscribe All Marketing Communications* selected will automatically be excluded from receiving the publication

#### Admin Tips:

- It's possible to configure OnePlace to allow up to 5 lists to be linked to a publication or function - best practice is to limit this to 1 for better targeting / list management
- Default *Communication Preference Exclusions* can be set so the user creating the publication will not need to select the exclusion each time. E.g. All publications can be set to exclude contacts with *No Newsletters* selected



## Populating the recipient list

A list can be populated by Marketing or the end users directly. The status of a contact will determine if it *can* be added to a list. See the [Contact Status](#) section below for details.

### Adding contacts via Manage Contacts button

Contacts can be managed directly on the list:

1. Within the relevant list > click **Manage Contacts** in the top right corner and select the relevant tab:
  - a. **Contact List Views** – shows the predefined views (searches) and allows you to create a new view
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  - c. **Other lists** – select contacts from another list (e.g. the Contributor List)
  - d. **Email Search** – if you have a list of contacts (e.g. in Excel), you can copy and paste the email addresses here and OnePlace will match the contacts already in OnePlace. Any which are not matched can then be manually added/imported to the system and the list
2. Select the contact(s) you want to contribute by ticking the box to the left of their name
3. At the bottom of the tab select the user you are adding contacts on behalf of:

New contacts will be recorded as added by

4. Click *Save Contact Selection*

| Name                                | Company Name    | Job Title | Email   | Phone                           | Mobile               | Mailing City  | Mailing Country          |
|-------------------------------------|-----------------|-----------|---|---------------------------------|----------------------|---------------|--------------------------|
| Angus Thompson                      | OnePlace        | COO       | angus.thompson@oneplace.global                          |                                 |                      | San Francisco | United States of America |
| <input checked="" type="checkbox"/> | Vijay Motramani | OnePlace  | Vice President Consulting Services and Customer Success | vijay.motramani@oneplace.global | +44 (0) 7748 985 960 | London        | United Kingdom           |

New contacts will be recorded as added by

### Tips:

- At the bottom of each tab you can select the user you are adding contacts on behalf of:

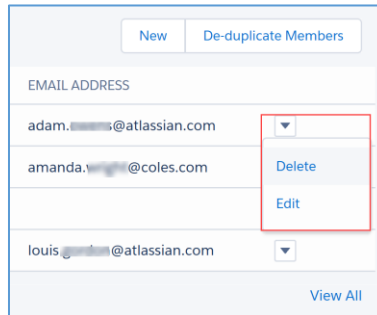
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- My Contacts are those which you have a knows relationship recorded – this is created when you add a new contact to OnePlace or by clicking the **I know** button on a contact record which already exist in the system
- Contacts marked in blue are already in the list. Please note that by unticking them and clicking save, they will be removed from the list
- You can filter the list using the Show drop-down to view Contacts not already in the list

- You can also sort the information by the column header (e.g. company name)

### Deleting contacts from a list:

1. On the list – click the down arrow to the right of the contact > select *Delete*; or



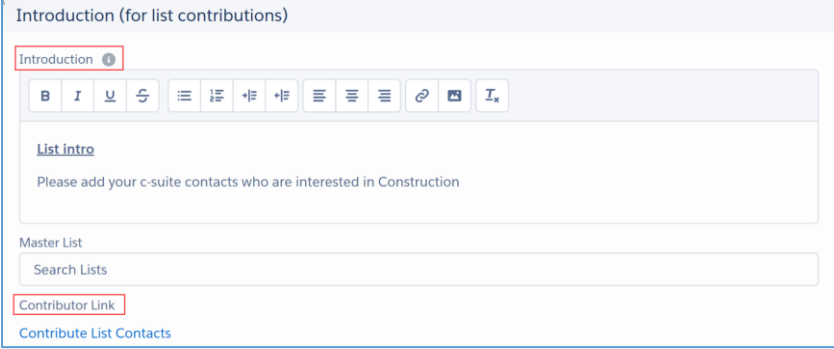
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3. On the *Existing Contacts* tab, tick the contacts to be removed > click *Remove Selected Contacts*

## Adding contacts via the Contributor Link

**NOTE:** Please note that this is new functionality and will be refined over new releases of OnePlace.

There is a link to allow end user to contribute to the list – *Contribute List Contacts* - this link is available when creating, editing or viewing a list so you can grab it any time. You can send the link to your end users and it will guide them through the process of adding their contacts to the list

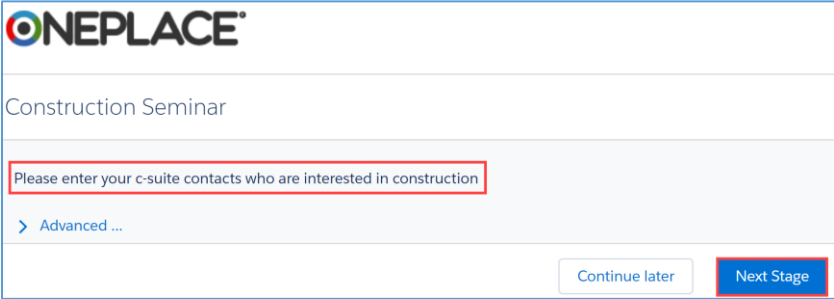
Any details entered into the *Introduction* box when editing the list will display to your end user when they're using the Contributor Link. You can use it to specify the type of contacts the users should add



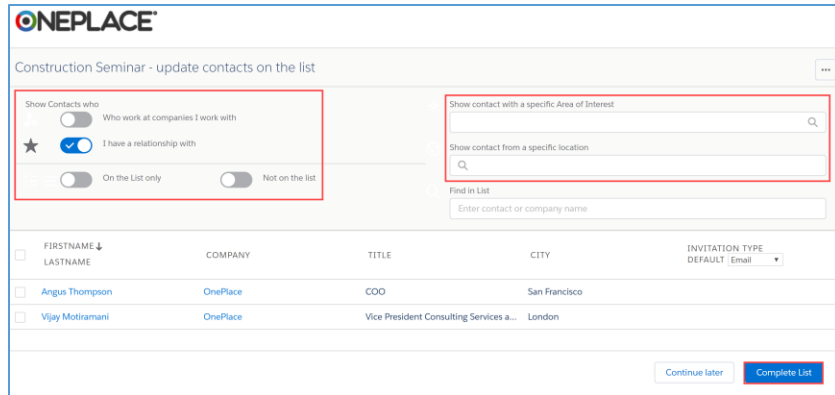
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1. The introduction entered when the list was created will display here > click *Next Stage*



2. Here you can show and select contacts:
  - a. *Who work at companies I work with* – contacts you are linked to via a matter - where you are a matter contact for the contact's company i.e. working attorney, supervising attorney or billing attorney
  - b. *I have a relationship with* – contacts where you have a knows relationship recorded
  - c. *On the List only*
  - d. *Not on the list*



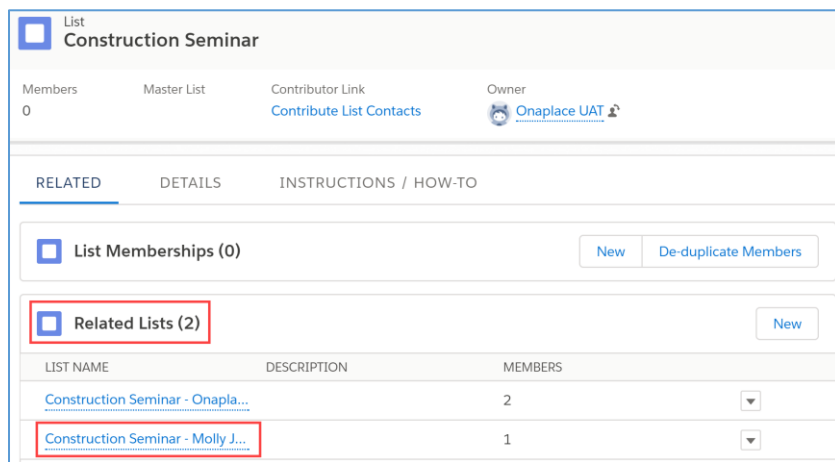
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5. You can search for contacts or companies within the list using the *Find in List* box
6. Click *Complete List*

**Tips:**

- Contacts with a tick are already in the list. Please note that by unticking them and clicking save, they will be removed from the list
- You can also sort the information by the column headers (e.g. First Name or Last Name)

**NOTE:** Contacts added via the Contributor Link will be added to a separate list which is automatically created for each contributor. This list will be named *[original list name] – [contributor name]* e.g. *Construction Seminar – Helen Pratley*.

Each list of contributed contacts can be viewed in the *Related Lists* section of the original list. To view, edit or add extra contacts to a list you can click the related list name:



Click *Continue List Contribution* to continue to add or remove contacts to the contributor list:

List  
**Construction Seminar - Onaplace UAT**

Members: 2

Master List: [Construction Seminar](#)

Contributor Link: [Continue List Contribution](#)

Owner: [Onaplace UAT](#)

## Merging contributor lists

To combine all the contributor lists:

1. Click the *Merge lists* tab found in the details tab
2. Select the list(s) to merge and click the ► to move the lists to the right-hand column. Use *Shift* to select multiple lists
3. When all relevant lists have been selected, click **Merge Lists...**

COMBINE / MERGE MULTIPLE LISTS

Search for list:

Only related lists

\* Select Lists to Merge

Available Lists

- Construction Seminar - Onaplace UAT (1) ►

Lists being merged

- Construction Seminar (3) ▲
- Construction Seminar - Molly J. (6) ▼

Merge Lists...

4. This will create another new list called *Merge target – [original list name]*
5. Click **Merge Lists Now**

Merge process commenced successfully, for large lists the process will continue in the background. Open the merge target list [here](#) ✕

Working on behalf of – when working on behalf of another user the contributor list will be created for that user, not yourself.

## Contact Status

Each contact will have a status assigned – when a new contact is created the status is automatically set to Current. The following status options are available:

- Current
- Dormant
- On Leave
- Retired
- Archived
- Deceased

When searching for contacts to add to a list, only those marked as *Current* will display in the results.

## Updating the subscribers on the publication

When you're ready to send the publication (via your emarketing tool), you must pull the contacts from the list into the publication:

1. Go to the publication > select *Update Subscribers*



2. This will display the contacts from the list in the *Publication Subscribers* section of the Publication
3. Click *View All* to see the full list and any exclusion reasons for the contacts. If an exclusion reason is shown, the contact will automatically not receive the invitation – see [Exclusion Reasons](#) section below for more details.

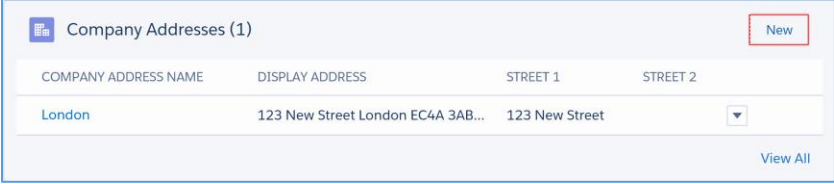
**Tip:** Exclusion reasons are checked as contacts are initially brought into the publication. If you update the subscribers before you are ready to send the publication, any exclusions set after contacts are added will not be honoured.

## Creating new companies

To enter a new company:

1. Select the *Companies* tab and click *New*
2. Enter as many details as possible following any data entry standards your firm has in place
  - a. *Parent Company* – this is used to build a company hierarchy where relevant – click *View Company Hierarchy* button to view details
  - b. *Description* – can be used for extra information about the company
  - c. *Company relationship type* – you can mark the company type e.g. referrer, competitor, supplier if relevant
3. Click *Save*

If a company has multiple locations, these can be added after the company record has been saved. In the *Company Addresses* section > click *New* > enter the details > click *Save*.

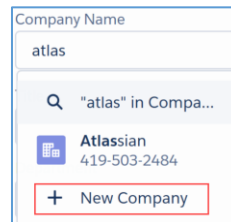


| COMPANY ADDRESS NAME | DISPLAY ADDRESS                   | STREET 1       | STREET 2 |
|----------------------|-----------------------------------|----------------|----------|
| London               | 123 New Street London EC4A 3AB... | 123 New Street |          |

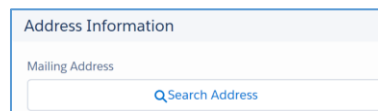
## Creating new contacts

New contacts can be entered via Outlook or in OnePlace directly. To enter a new contact in OnePlace:

1. Select the *Contacts* tab and click *New*
2. Enter as many details as possible following any data entry standards your firm has in place
3. *Company Name* – enter the contact’s company name and select the relevant company from the options provided
4. If the company doesn’t already exist in OnePlace, click the *New Company* option to create the company first



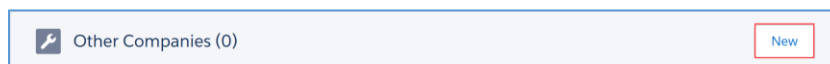
5. If you are creating a contact which is not linked to a company e.g. a private client, enter “*No Company*” in the *Company Name* field. If the company name field is left blank, the contact will be kept private to you only and cannot be included in any marketing lists etc
6. *Address* – these fields can be used to enter a personal or alternative address for the contact if relevant. If the contact’s main address is their company address, there’s no need to enter this here as it’s stored on the company record
7. Use the *Search Address* option to easily find an address



8. Click *Save*

Contacts can be associated to multiple companies:

1. In the *Other Companies* section > click *New*

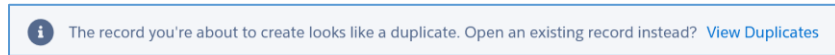
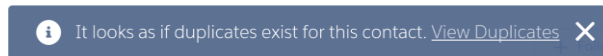


2. Enter a *Name* e.g. Director, Consultant
3. *Secondary Company* – enter the company name and select the relevant company from the options provided
4. If the company doesn’t already exist in OnePlace, click the *New Company* option to create the company first
5. Click *Save*



## Duplicates

OnePlace will identify potential duplicate contacts and companies as they are created. When a potential duplicate is created, this message will display:



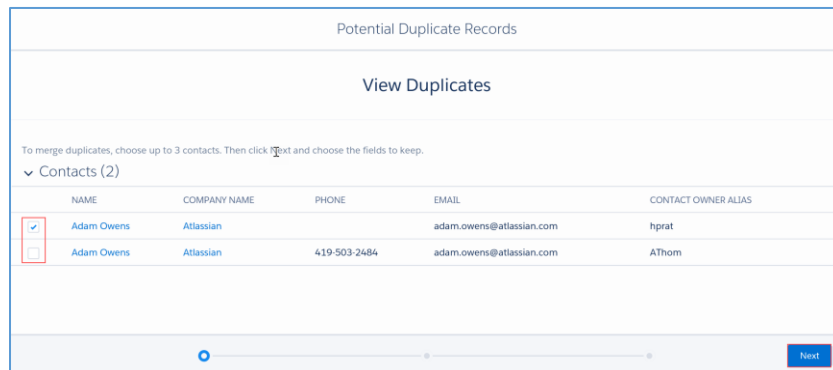
1. Click *View Duplicates*
2. Click *Open This Contact / Open This Company* to cancel the create process and open the exiting record
3. Or close the window and continue to create the record if this is not a duplicate.

To view and merge duplicates once they have been created:

1. On the right-hand side in the Data Quality section click *View Duplicates*

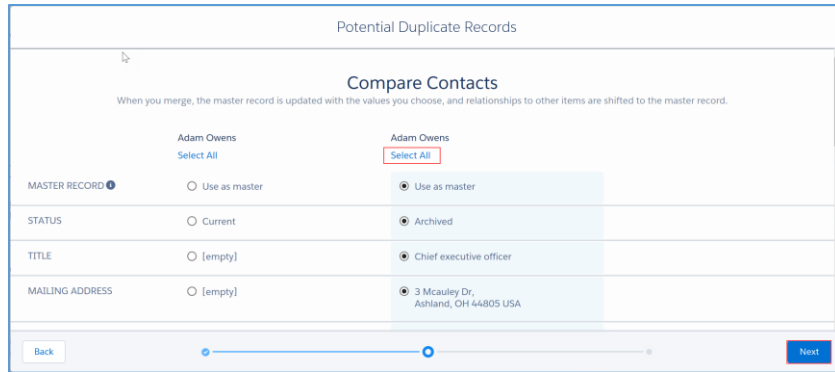


2. Select up to 3 duplicate contacts/companies to merge > click *Next*



3. Select the information to keep when the data is merged > click *Merge*

When merging, 1 record will be set as the '*master*' and the duplicate(s) will be merged into that master record. The *master record* retains the following: chatter feeds, read only and hidden values (except the created date and user) and portal user status (for contacts only).



4. To change the master record, click *Select All* above the contact/company you wish to set as the master
5. This view will display the fields with different values, click *Show All Fields* at the bottom of the screen to view all details:

Showing fields with different values. [Show All Fields](#)

6. Click *Next*

### Confirm Merge

Are you sure you want to merge these records?

You're about to merge these contacts. You can't undo merging.

7. Click *Merge Contacts / Merge Companies*

**Tip:** Duplicate contacts are identified if they have the same:

- First Name, Last Name, **Job Title**, and Company
- First Name, Last Name, **Email**, and Company
- First Name, Last Name, **Phone**, and Company
- First Name, Last Name, **Mobile**, and Company

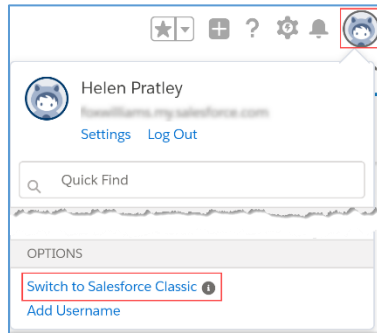
## Merging Duplicates

When merging duplicate companies and contacts you need to switch to the Classic view of OnePlace.

When merging companies or contacts, ensure you're not merging away any important data on a record e.g. a client number.

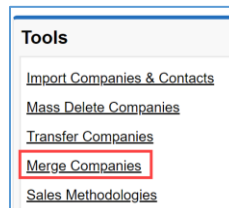
To toggle from lightning to classic view:

1. Click your user profile at the top of the page
2. Select **Switch to Salesforce Classic**



## Merging Companies

1. Click the **Companies** tab
2. Click **Merge Companies** in the bottom right corner

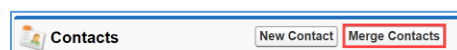


3. Enter the name of a duplicate company and click **Find Companies**
4. Select up to 3 company records to merge and click **Next**
5. Review the different data available and select the field(s) to keep using the radio buttons
6. Click **Merge**

## Merging Contacts

To merge contacts, the duplicates must be linked to the same company record. If necessary, you can use the **Change Company** button on a contact record to update the company details.


1. Open the company record of the duplicate contacts
2. In the Contacts section click **Merge Contacts**

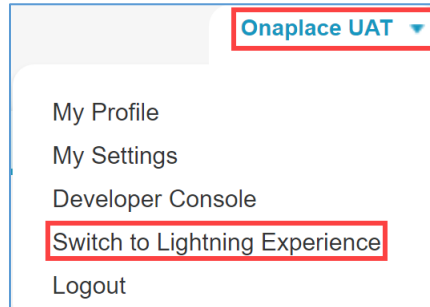


3. If necessary, enter the name of the duplicate contact and click **Find Contacts**
4. Select up to 3 contact records to merge and click **Next**
5. Review the different data available and select the field(s) to keep using the radio buttons


6. Click **Merge**

To toggle from classic to lightning:

1. Click  **Switch to Lightning Experience** at the top of the page OR
2. Click your user name at the top of the page
3. Select **Switch to Lightning Experience**




## Creating a new List View

1. Select the tab you want to create a list view within e.g. Contacts, Companies etc
2. Click the  button and select *New*
3. Enter a name for the list view
4. Determine who can see the list view (only you or all users)
5. Click *Save*
6. In the Filters section on the right-hand side click the *Show me* panel and select *My Contacts* or *All Contacts*
7. Click *Add Filter* and select the *Field*, *Operator* and *Value*
8. Click *Done*
9. Click *Add Filter* to enter further criteria
10. Click *Save*
11. Click *Add Filter Logic* to specify if each criterion should be separated with AND or OR

Tip: AND v OR

For conditions where each criteria must be satisfied, choose AND

For conditions where any criteria can be satisfied choose OR

12. Click the  button to *Select fields to Display*; then click *Save*

## Referrals

Inbound and outbound referrals can be recorded within OnePlace.

The fields available for each type of referral vary slightly:

### Inbound

1. Select the *Referrals* tab > click *New*
2. Select *Inbound* > click *Next*
3. Complete the relevant details about your referral – these can also be edited at a later stage
  - a. *Company* – select the company which is referring work to the firm
  - b. *Contact Who Referred* – select the contact who referred the work to the firm (from the above company)
  - c. *Referred Company* – select the company which was referred to the firm
  - d. *Referred* – a free text field to enter the name of the company which was referred to the firm if they are not a company record within OnePlace
  - e. *First Name* – free text field to enter the name of the contact at the referred company
  - f. *Last Name* - free text field to enter the name of the contact at the referred company
  - g. *Matter* – if the referral is successful it can be linked to a matter within OnePlace
4. Click *Save*

### Outbound

1. Select the *Referrals* tab > click *New*
2. Select *Outbound* > click *Next*
3. Complete the relevant details about your referral – these can also be edited at a later stage
  - a. *Company* – select the company which you are referring work to
  - b. *Contact Referred To* – select the contact who the work was referred to (from the above company)
  - c. *Referred Company* – select the company you are referring
  - d. *Referred* – a free text field to enter the name of the company you are referring if they are not a company record within OnePlace
  - e. *First Name* – free text field to enter the name of the contact at the referred company
  - f. *Last Name* - free text field to enter the name of the contact at the referred company
4. Click *Save*

Referrals can be viewed from the referrals tab, a company record or a contact record within OnePlace.

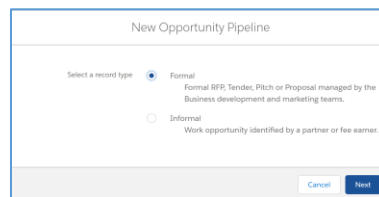
## Pipeline / Opportunities (Pitches)

Pipeline can be used to record opportunities coming into the firm such as pitches.

Both formal and informal opportunities can be recorded.

To create a new opportunity:

1. Select the **Pipeline** tab
2. Click **New**
3. Select **Formal** or **Informal** as necessary
  - a. Formal opportunities are usually recorded by Marketing and BD teams when formal opportunities for work are being recorded e.g. RFPs, tenders or pitches.
  - b. Informal opportunities are usually identified by a partner or fee earner.



The screenshot shows a web form titled "New Opportunity Pipeline". It contains a section labeled "Select a record type" with two radio button options. The first option is "Formal", which is selected (indicated by a blue dot), and its description is "Formal RFP, Tender, Pitch or Proposal managed by the Business development and marketing teams." The second option is "Informal", which is not selected, and its description is "Work opportunity identified by a partner or fee earner." At the bottom right of the form, there are two buttons: "Cancel" and "Next".

4. Click **Next**
5. Complete the relevant details – these can be edited at a later stage:
  - a. **Opportunity Name** – enter a name for the opportunity
  - b. **Company** – select the company the opportunity is with
  - c. **Main Company Contact** – select the main contact at the opportunity company
  - d. **Lead Lawyer** – select the lawyer leading the opportunity
  - e. **Lead BD** – select the BD contact leading the opportunity
  - f. **Primary Practice Group** – select the main practice group – this can be used for reporting on opportunities by practice group
  - g. **All Practice Groups** – select any other practice groups involved in the opportunity
  - h. **Stage** – select the stage of the opportunity e.g. Unqualified, Invitation to tender, Closing, Active etc.
  - i. **Priority** – select the priority of the opportunity e.g. Low, Medium, High
  - j. **Probability** – enter the probability of proceeding with the matter
  - k. **Open Date** – enter the date the opportunity opened
  - l. **Close Date** – enter the date the opportunity closed
  - m. **Source** – select the source of the opportunity e.g. Employee/Internal, External Referral, Newsletter, Trade Show etc.

- n. **Source Function** – if the opportunity arose from an event, you can connect it to the relevant function in OnePlace. This allows you to report more accurately on your return on investment from an event.
- o. **Prospect Key Drivers** – allows you to select the key factors that are driving the prospect:

- p. **Conflict Check** – record when a conflict check has been performed to avoid moving too far with the opportunity before discovering that the firm is conflicted out:

- q. Enter Financial Information:
  - i. **Estimated Fees** – enter the amount quoted on the tender or fee proposal
  - ii. **Legal Spend** – enter the amount the company spend on legal services
  - iii. **Recurring Services** – enter the amount the company spend on recurring services

- r. Enter Outcome details:
  - i. **Outcome** – select the outcome e.g. Won, Lost, Declined, Deferred
  - ii. **Outcome Reason** – select the reason for the outcome
  - iii. **Outcome Date** – record the outcome date



- iv. **Competing Company Awarded** – if not successful, record who won the opportunity, allowing you to report on competition

The 'Outcome' form contains the following fields:

- Outcome: A dropdown menu currently set to "--None--".
- Outcome Date: A date selection field.
- Outcome Reason: A list of reasons including "Business Concerns", "Change in Priorities", "Conflict", and "Highest scoring tender".
- Competing Company Awarded: A search field with the placeholder text "Search Companies..." and a magnifying glass icon. This field is highlighted with a red border.
- Outcome Description: A large text area for additional notes.

- s. Enter **RFP** details:

The 'RFP details' form contains the following fields:

- RFP Announcement Date: A date selection field.
- RFP Submission Date & Time: A combined date and time selection field.
- Proof of Delivery: A dropdown menu currently set to "--None--".
- Proof Reference: A text input field.

- t. Enter **Pitch** details:

The 'Pitch details' form contains the following fields:

- Pitch Announcement Date: A date selection field.
- Pitch Submission Date: A date selection field.
- Clarifications Deadline: A combined date and time selection field.
- Pitch Actual Submission Date: A date selection field.
- Proposal Sent Date: A date selection field.
- Presentation Date/Time: A combined date and time selection field.

- u. Enter **Documentation** details

The 'Documentation details' form contains the following fields:

- Documentation Type: A dropdown menu with options: "Added value offerings", "Beauty parade", "Biographies", and "Contract".
- Document Date: A date selection field.

6. Click **Save**

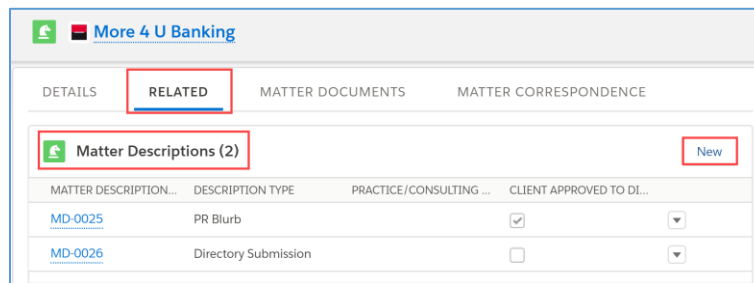
Once an opportunity is recorded, it can be viewed from the pipeline tab, or on the related company record.

## Matter Experience

Matters are typically brought into OnePlace via an integration with your finance system.

The Matter Experience allows you to record multiple matter descriptions on a matter which can then be used to populate professional bios, the firm's website, directory submissions etc.

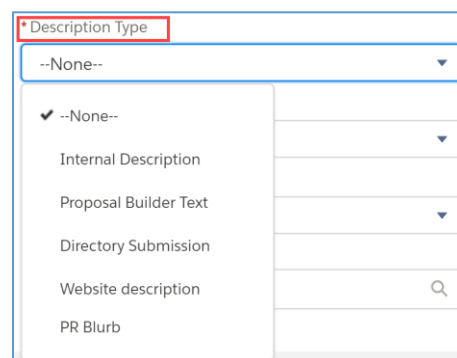
When viewing a matter, the related lists will include a **Matter Descriptions** section.



## Creating a new Matter Description

To create a new matter description:

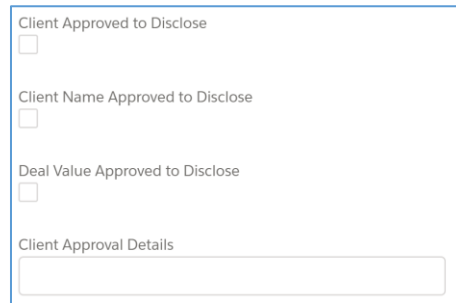
1. Click the **Matters** tab
2. Select the relevant matter
3. On the **Related** tab, scroll to the **Matter Description** section
4. Click **New** in the Matter Description section
5. Complete the relevant details – these can be edited at a later stage:
  - a. **Description Type** – the use of the matter description e.g.:
    - i. Proposal Builder Text
    - ii. Directory Submission - a date field can also be enabled
    - iii. Website description - integration with your website can be built to pull the relevant descriptions across



- b. **Type** – pick list can include sectors, practise groups etc
- c. If necessary, descriptions can be marked as inactive

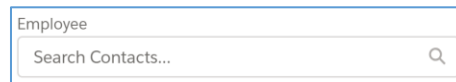


- d. **Disclosures** – allows you to record if you can reference the client externally. The firm can decide if this should be recorded at Client, Matter or Matter Description level if necessary.



A form titled "Client Approved to Disclose" with three checkboxes: "Client Approved to Disclose", "Client Name Approved to Disclose", and "Deal Value Approved to Disclose". Below these is a text input field labeled "Client Approval Details".

- e. **Employee** – allows you to connect the matter description to an internal contact which can then be displayed on the bio for the user. If this matter description is also relevant to another employee, the description should be copied and then connected to the other user. This allows the description to be tailored to each fee earner.



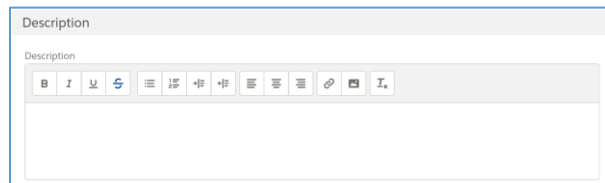
A search field titled "Employee" with a placeholder text "Search Contacts..." and a magnifying glass icon on the right.

- f. **Practice/Consultancy Group** – select the group(s) the matter description relates to



A dropdown menu titled "Practice/Consulting Group" with a list of options: "Corporate", "Dispute Resolution", "Financial Institutions Group", and "Human Resources & Industrial Relations".

- g. **Description** - a rich text HTML editor



A rich text editor titled "Description" with a toolbar containing icons for bold, italic, underline, link, bulleted list, numbered list, indent, outdent, link, unlink, and source code. Below the toolbar is a large text area for entering the description.

6. Click **Save**

Once a Matter Description has been created, it can be viewed, edited and copied from the **Matter Description / Credentials** section visible on the matter. The descriptions are split into 2 sections: **Firm Matter Descriptions** and **Staff Matter Descriptions** – descriptions connected to an employee.

More 4 U Banking

Capture Matter Description / Credential New

Matter Descriptions / Credentials

**FIRM MATTER DESCRIPTIONS ( 2 )** STAFF MATTER DESCRIPTION ( 1 )

Biotechnology - Appellate  
Some thing about something. ▼

Biotechnology - Appellate  
Some thing about something ... and we did loads of work. ▼

Next to each description, the drop-down arrow allows you to Copy, Edit or Delete the description.

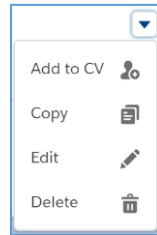
## Adding a Matter Description to a Professional Bio

Professional Bios can be used to track the work a user has been involved in. Users can have multiple bios allowing each bio to focus on sector or industry specific experience.


An approval process can be enabled if necessary.

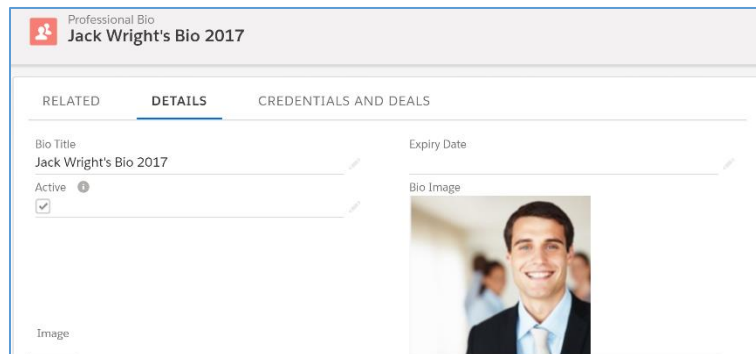
To add a matter description to a professional bio:

1. Select the drop-down list to the right of the relevant matter description (copy first if necessary)
2. Select **Add to CV** – the description will then be available in the Professional Bio object

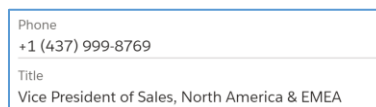


Open Professional Bios:

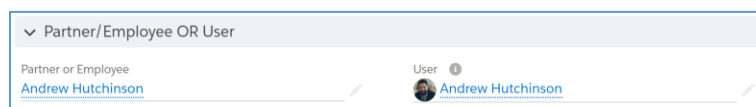
3. Click the  icon > select **Professional Bios**
4. Click **New** or select an existing bio to edit or clone:
  - a. There are multiple bio **image** fields available allowing for different size images (e.g. a size appropriate for your website vs used in a pitch document)



5. **Phone** and **Job Title** fields are specific to the bio – these may vary from the information stored on the user or contact record:



6. You can link the bio to a user and/or contact record:



- Select any relevant **Areas of Expertise** – this is a multi-value field allowing you to search by expertise
- Level of Expertise** – this allows you to record the level of expertise for the contact in this area. Most useful when the bio is used for just 1 Area of Expertise:

- A **Short CV** and/or **Long CV** can be entered
- Representative Clients, Cases or Matters** – can contain text or URLs to examples of relevant experience

- Click **Save**
- Select the **Credentials and Deals** tab
- From the list of matter descriptions connected to this user, select the relevant matter descriptions and the order in which they should be displayed on the bio using the arrow icons
- Click **Save**