

# MyClientRecord

Complete Client Control



# So what is it?

- MCR stores all of your client and other contact details in one place
- It saves all of your communication with clients chronologically, including emails, letters, phone records, reports and notes
- You can access any record with the click of a mouse
- You can write and email people easily
- You can keep notes of financial matters
- It is a perfect administrator
- It is **so** easy to use

MCR Search - showing only Roles'Combo1'

People Define Market Manager Help

Name	Phone	Company	Address	City	Postcode	Role
Barney Adams		Arcadia CC	Arcadia County Council, ,			FeeEarner
Steve Allsop			18 Dale Road, ,	Chichester		Party
Adams v flint ambc						Party
Charlie Bartlett		Fishers	Fisher & Sons, Solicitors, New Lane,	Arcadia		FeeEarner
Victoria Burton			37 Tavistock Close, ,	Sidmouth		Client
Luke Carlyle			Hampton Clinic, 12 Fosse Lane,	Hove		Psychiatrist
virgin credit card						utility bills
Helen Duncan			19 Box Tree Close, ,	Dulwich		Party
Margaret Dunne		Legal Services	Arcadia County Council, ,			FeeEarner
Dave Glover			Dun Roamin', Carts Lane,		Louth	Expert Witness
Gordon Hamilton			Dural, 23 Melbourne Ave,	Lytham		Client
Patricia Hamilton						FeeEarner
Penelope Harding		Grampions	65 Forest Drive, ,			Solicitor
Victoria Hewitt			Rainbows End, Park Road,	Filey		Party
Greg Hudson	018364987665		Gordon & Scott Solicitors, 23 Newgate R	Hythe		Solicitor
Patricia Morrell			167 Palmer Ave, ,	Redcar		Client
wetq rqrqe						Psychiatrist

Last Name Search

Company Search

Show Clients Only
  Show All Contacts

Role Search

MCR provides a complete list of your clients and contacts. You can filter them by their Role and search by surname and company. Everyone you know is at your fingertips.

Details - Patricia Morrell

People Define Records Standard Documents Contact Time Recorder Bookkeeper Help

**Details** Records Notes

First Name	Patricia	Phone	01509 334762
Last Name	Morrell	Mobile	07728736158
Salutation	Dear Patricia	Fax	
Address	167 Palmer Ave	Email	pat.morell@hotmail.com
		DX	www.hamiltonindustries.co.uk
		Role	Client ...
City	Loughborough	DOB	
Postcode	LE11 7TH	Gender	
Company	Hamilton Industries	Child	<input type="checkbox"/>

Check for Duplicates Save and Close

Everyone's details are added in the same way, clients, contacts and suppliers. It makes it so easy to keep a track of who is who.

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Details Records Notes

Show All Show All Show All

Work Type	Category	Document/File	Status	Date	Time	Sel
Appeal Option 2	Attch Recd	Decision Making 150309.pdf	Recd	22/09/2010	13:38	
Appeal Option 3	Email out	just testing.doc	Sent	30/09/2010	13:52	
Appeal Option 2	Attch Recd	Microsoft Office Outlook Test Message	Recd	02/10/2010	13:38	
Appeal Option 2	Attch Recd	MoJ new structure.pdf	Recd	12/10/2010	13:39	
Appeal 1	Drafts	Agreement of Purchase and Sale of St	Sent	12/10/2010	13:32	
Appeal Option 2	Attch Recd	expert pro forma letter.doc	Recd	19/10/2010	13:38	
Appeal Option 3	Bills	Law Autumn Show Catalogue.pdf	Recd	22/10/2010	13:38	
General Advice	Word Document	new type .doc	Sent	26/10/2010	13:49	
Appeal 1	Email In	METER REGISTRATION.doc	Recd	27/10/2010	13:35	
Appeal 1	Email In				13:35	
Appeal 1	Documents				13:47	
Appeal Option 2	Attch Recd				13:39	
Appeal Option 2	Attch Recd				13:38	
Appeal 1	Email In				13:35	
Appeal 1	Email In				13:35	
Appeal Option 2	Email out				13:52	

- Emails, attachments, documents are all stored in date order.
- MCR lets you define the nature of a record, e.g. an email out, and lets you name the record so it is easy to find at a later stage.
- You can split your records for multiple work types or new matters for the same client.
- MCR is flexible to meet your needs.
- It also stores pictures, videos and sound files
- To access a record, simply double click

## Client Record - Patricia Morrell

CATEGORY	DOCUMENT/FILE	STATUS	DATE	TIME
Appeal Option 2	Decision Making 150309.pdf	<u>Attch</u> Recd	Recd	22/09/2010
Appeal Option 3	just testing.doc	Email out	Sent	30/09/2010
Appeal Option 2	Microsoft Office Outlook Test Message.pdf	<u>Attch</u> Recd	Recd	02/10/2010
Appeal Option 2	<u>MoJ</u> new structure.pdf	<u>Attch</u> Recd	Recd	12/10/2010
Appeal1	Agreement of Purchase and Sale of Shares by Shareholder.pdf	Drafts	Sent	12/10/2010
Appeal Option 2	expert pro forma letter.doc	<u>Attch</u> Recd	Recd	19/10/2010
Appeal Option 3	Law Autumn Show Catalogue.pdf	Bills	Recd	22/10/2010
General Advice	newtype.doc	Word	Sent	26/10/2010
Appeal1	ME		cd	27/10/2010

- You can print a complete record of every stored record. Managing files is made simpler with MCR.
- Clients or regulators have an instant record of every action on a client's matter.

Details - Patricia Morrell

People Define Records Standard Documents Contact Time Recorder Bookkeeper Help

Details Records **Notes**

Notes

Very keen tennis player. Not available to talk except on Thursday eve other times leave a message with her step son Wayne Hamilton. No nonsense approach to events and wants matters resolving quickly

- Adding notes about your client as a ready reminder is easy also.
- You can add these notes directly to the full records screen if you wish or keep them solely as a quick reminder of key issues.
- You can also do a “word search” of the notes across the whole of MCR

Critical Notes

Always asks for credit and tho she does pay in the end can be very slow.

Check for Duplicates Save and Close

# Summary

- Immediate access to every client file
- MCR speeds up the admin process
- It is so simple to learn and use
- MCR makes marketing a breeze
- The more you use it, the better it gets!
- Storage, archiving and retrieval are immediate