

# Internal FAQ – Firm Central Sunset

August 2024

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**Customers should NOT lapse their Firm Central subscription until they have exported ALL of their data out of Firm Central.**

## GENERAL FAQ

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### What is happening?

Firm Central, the Thomson Reuters practice management platform will be sunset on September 30, 2024. (This also impacts Time & Billing, eBillity, Affinipay and any FC Additional Storage materials). If a customer subscribes to any of these materials and wants to lapse 1, please make sure any others are lapsed as well, otherwise they will lapse automatically on Sept 30, 2024

#### **Firm Central**

WN Pro FC Custom FMS Seat  
Custom Forms on Westlaw  
Firm Central, Seat  
Firm Central, MLA  
WN Pro Custom FMS Seat  
Firm Central Practice Management Suite - Basic Firm  
Central Practice Management Suite – Premium  
Firm Central Essential, Seat  
Firm Central Essential with Accounting, Seat  
Firm Central Premier  
Firm Central Premier with Accounting, Seat

#### **Time & Billing**

Practice Suite Time and Billing Powered by eBillity  
Time and Billing Powered by eBillity

#### **Firm Central Additional Storage**

DR FC Data Room Extended Core 2 GB  
DR FC Included Storage 100 GB  
DR Additional Storage 20 GB  
DR Additional Storage 50 GB  
DR Additional Storage 100 GB

#### **Deadline Assistant**

Firm Central Deadline Assistant  
Firm Central with Deadline Assistant

Contact your Thomson Reuters Sales Rep or Client Manager prior to September 30, 2024, if you wish to continue utilizing the standalone version of Deadline Assistant.

#### **eBillity**

For customers that utilize Time & Billing via eBillity, you can continue using your Time Tracker by eBillity solution by updating your billing information in the pop-up when you next log in. After doing so, you will begin to be billed directly by eBillity. Please reach out to Joann Groninger [jgroninger@ebillity.com](mailto:jgroninger@ebillity.com) with any questions.

#### **Affinipay**

For Firm Central customers that utilize Affinipay for customer billing, please contact Affinipay directly to ensure there is no interruption to service. Please reach out to LawPay with any questions. LawPay Sales: 866-376-0950; [sales@lawpay.com](mailto:sales@lawpay.com) or LawPay Support: 800-459-5798; [support@lawpay.com](mailto:support@lawpay.com)

<b>Why is Firm Central being sunset?</b>	Thomson Reuters regularly assesses its product portfolio to optimize alignment toward our strategic direction as a content-driven technology company. As part of a recent review, and due to the closing of the data warehouse, the decision has been made to discontinue the Firm Central Product.
<b>What does this sunset mean for me?</b>	<p>Currently, Firm Central is a renewable product for existing customers, but not sellable to “new” customers.</p> <p>As customers lapse their Firm Central (due to this sunset), this is a great opportunity to reallocate those dollars into other TR products, especially if they are not going to continue to utilize a firm management platform.</p> <p>For customers who have high usage of Firm Central, they will most likely be evaluating and moving to another Firm Management platform/provider. It is important that we work to support them during their migration as much as we can to ensure a smooth transition.</p>
<b>What if Firm Central is up for renewal prior to the sunset date and the customer isn’t ready to lapse it yet?</b>	<p>The final date that Firm Central customers are able to renew Firm Central will be September 1, 2024. They will continue to have access through September 30, 2024.</p> <p>Oct 1, Firm Central (and any secondary subscriptions as listed above) will be automatically lapsed from the customers contract and access to Firm Central will be restricted to “read-only”. Customers will still be able to access their data via the Firm Central Dashboard, which also allows them continued access to the self-serve data export feature until March 31, 2025.</p> <p>It is our recommendation that customers evaluate alternative Firm management providers and begin to export/migrate their client data to whatever new platform they choose prior to September 2024.</p>
<b>If Firm Central is in a ProFlex and the ProFlex is up for renewal and the customer isn’t ready to lapse Firm Central, what do I do?</b>	<p>In a situation like this, please renew Firm Central as normal with all of the other products in the ProFlex.</p> <p>We are allowing customers to lapse Firm Central as needed (without having to go through the ICLR process), regardless of renewal date, so when they are ready to lapse, they can simply let us know as normal.</p> <p>Once they are ready to lapse the Firm Central, then you would need to do a ProFlex modification to drop it out of the ProFlex</p>
<b>Can the customer set a future lapse date on just the Firm Central portion of a ProFlex?</b>	<p>No, the customer will need to call in and let us know when they are ready to lapse Firm Central.</p> <p>It is HIGHLY recommended that they export all of their Firm Central data prior to lapsing.</p>
<b>Can I upband/downband Firm Central customers if needed?</b>	<p>Right now it is ok to downband or upband to ensure the firms products are all at the same count.</p> <p>If seat/user additions are needed, please do so sparingly and ensure the customer is aware that the product is going away. Any seat additions and their correlating additional costs will be added to the total Firm Central allocation and will count against you.</p>
<b>When can customers start lapsing Firm Central?</b>	<p>Customers can lapse Firm Central when it is convenient for them. There is NO early termination fee (as rumored) and there is no ICLR process required.</p> <p>If a customer subscribes to any of the materials listed above and wants to lapse 1, please make sure any others are lapsed as well, otherwise they will lapse automatically on Sept 30, 2024</p>

	Ensure the customer is aware that it is our recommendation that they export their data out of Firm Central prior to lapsing.
<b>Will customers receive a credit for Firm Central?</b>	<p>Customers will receive a prorated credit for the remainder of the days in the month if they want the lapse to be effective immediately.</p> <p>If they want to have Firm Central lapse at the end of the current month or if they set a lapse date at the end of any month in the future, they will not receive any credits.</p>
<b>How does this sunset impact my compensation?</b>	Standard incremental rules apply. This means the incremental value you will be paid on includes the deduction of the current value of Firm Central.
<b>If customers need additional help with the data extraction, where can I send them?</b>	<p><a href="mailto:FCDatamigration@thomsonreuters.com">FCDatamigration@thomsonreuters.com</a>  Firm Central Tech Support: 888-287-8537  Firm Central Support Line: 800-977-9378</p> <p>Additionally, the Firm Central Product Specialists are available:  Kevin Gullickson: <a href="mailto:kevin.Gullickson@thomsonreuters.com">kevin.Gullickson@thomsonreuters.com</a>  Andre King: <a href="mailto:andre.king@thomsonreuters.com">andre.king@thomsonreuters.com</a></p>

## DATA & DATA MIGRATION

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<b>How do Firm Central customers get their client and matter data out of Firm Central?</b>	<p><b>Customers have been re-grouped into 2 categories:</b></p> <ol style="list-style-type: none"> <li>Customers pre-approved to use Integreon <ul style="list-style-type: none"> <li>Customers with more than 10K GB of data within Firm Central have been pre-approved to utilize Integreon for their data extraction. These customers will be informed of this service via email. This is a service Thomson Reuters is paying for.</li> <li>A list of these accounts can be found <a href="#">HERE</a>, with treatment designation in COLUMN C</li> </ul> </li> <li>Customers that must go through the self-serve process <ul style="list-style-type: none"> <li>The self-serve tool within Firm Central will be used by the remaining 75% of customers that have less than 10K GB of data within Firm Central.</li> <li>A list of these accounts can be found <a href="#">HERE</a>, with treatment designation in COLUMN C</li> <li><a href="#">Data Extraction Guide</a> is available to customers (and will be linked in an email communication sent to them).</li> <li>We are hosting multiple webinars for these customers to attend and ask questions about the self-serve export tool. Links to register for the webinars have been sent to these customers.</li> </ul> </li> </ol>
<b>What if a customer is exporting their data themselves via the self-serve tool and needs help?</b>	<p>If a customer reaches out to you and is struggling with the self-service portal, please have them first contact the Customer Technical Support Team at 888-287-8537. In most cases, their issue will be resolved.</p> <p>If it is determined that the customer is unable to complete the data extraction themselves, there is an escalation process in place where customer service, customer technical support, sales reps or client managers can make the request to allow the customer to utilize the in-house bulk export tool that has been developed.</p> <p>To initiate any escalations, please complete this <a href="#">FORM</a></p>

**Are there limitations to the amount or type of data that can be extracted from Firm Central?**

Depending on the amount of data you have within Firm Central, it is possible that you will have to export data in multiple sessions.

There are also nuances to the types of data that is exportable on an ACTIVE Firm Central subscription versus a LAPSED Firm Central subscription:

	Active Subscription Export Capabilities	Lapsed Subscription Export Capabilities
Open Matters	Individual Matters - Yes	Individual Matters – No Matter List - Yes
Closed Matters	Individual Matters - Yes	Individual Matters – No Matter List - Yes
Matter Notes	Yes	Yes
Research Folders	Yes	Yes
Matter Folders	Yes	No
Calendar Event	Yes, 365 days at a time	Yes, 365 days at a time
Open Tasks	Yes	Yes – only from Home Page
Closed Tasks	Yes	Yes – only from Home Page
Private Tasks	Yes	Yes – only from Home Page
Documents	Yes	Yes
Annotations	Yes, if selected	Yes, if selected
Accounting	Yes	Yes
Time & Billing	Yes	Yes
Reporting	Yes	No
Deadline Assistant Events	Yes, as calendared	Yes, as calendared
Non-Deadline Assistant Events	Yes, as calendared	Yes, as calendared
Recurring Events	Yes, as calendared	Yes, as calendared
eBillility Records	On eBillility Servers	On eBillility Servers
Affinipay Records	On Affinipay Servers	On Affinipay Servers
Recycle Bin	Yes	Yes

**If the customer has been pre-approved to use Integreon for their data extraction what is the process they need to follow?**

First check to confirm the customer is on [this list](#). These customers are “pre-approved” to use Integreon for their data extraction needs. If they are on this list, please forward this [OFT](#) to them that includes a link where they can initiate the process and acknowledge the waiver.

The customers must acknowledge the waiver document in order to utilize Integreon services. The waiver is an acknowledgement by the customer that they are aware they are using a 3<sup>rd</sup> party for data extraction.

These details have been emailed to these customers, however, if they misplace or lose the email for any reason, the OFT is exactly the same as they previously received.

**For customers that need to be escalated to the in-house tool, what does that process look like?**

The request [FORM](#) will be received and reviewed by the PM, who will then take over and operate as the point of contact for the firm during the extraction process.

The firm representative will need to provide us with their OnePass login credentials so that the internal team is able to access their data and export it. Again, the PM will own this process and be the single point of contact for the firm during this time.

**What if a customer want's a 3rd party**

Customers that are on the pre-approved list to utilize Integreon services can be found [HERE](#).

<b>vendor to access the customers data and extract it for them?</b>	If a customer wishes to use a 3 <sup>rd</sup> party provider other than Integreon, they can do so at their own expense.
<b>What happens if the customer cancels/lapses their Firm Central before they extract their data?</b>	<p>Lapsing their Firm Central subscription prior to the full and complete extraction of their data IS NOT RECOMMENDED.</p> <p>Any customer needing to have their subscription reinstated so they can access and export data, should be forwarded as normal to Customer Service (standard process) via opening a sales case in GSI.</p> <p>If the customer calls into Customer Service on their own, Customer Service will initiate the reinstatement by making a reinstatement request in Salesforce. This request then goes to Order Management to actually complete, via a referral.</p> <p>Estimate 2-5 days before Order Management actions the request; it can take longer, and Customer Service will submit an escalation if needed.</p> <p>We can't suspend billing so Order Management will have to process the reinstatement at a 100% discount to avoid billing completely. Order Management will set a future lapse date 30 days from reinstatement date to provide the customer enough time to access and export their data.</p>
<b>After September 30, what happens to customer data if it is not removed from Firm Central?</b>	<p>If the customer does not get client data out of Firm Central by September 30, 2024, they will still be able to access their "read only" data via the Firm Central Dashboard and are able to access the self-serve data export tool until March 31, 2025.</p> <p>Beginning October 1, 2024, Firm Central will no longer be usable as a Firm Management tool and all data will be "read-only", BUT they can access the Firm Central Dashboard and self-serve export tool to extract their data.</p> <p>After 180 days (from March 31, 2025), we are no longer required to save the data and it may be purged from our systems.</p>
<b>After September 30, what is the process customers need to follow to access and download their data?</b>	Beginning October 1, 2024, Firm Central customers will still be able to access and export their data (until March 31, 2025) via the Firm Central Dashboard. On April 1, 2025, they will no longer be able to login or access the Firm Central Dashboard.
<b>The customer has extra data room storage subscriptions. What happens to those?</b>	<p>Those subscriptions will also be lapsed when they lapse Firm Central. Customers will still have access to their data via the Firm Central Dashboard tool in "read only" format.</p> <p>If the customer subscribes to other products that utilize the data room, NO data will be purged. The systems are unable to determine which data belongs to which product so as long as the customer has a product that utilizes the data room, ALL of their data will remain within the data room.</p>

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<b>What if the customer has an integrated Deadline Assistant?</b>	<p>Deadline Assistant as a product is not going away.</p> <p>If the customer has Deadline Assistant integrated with their Firm Central subscription, such as Firm Central Premier or Firm Central Premier with Accounting, they have the option to</p>
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	<p>purchase the stand-alone version of Deadline Assistant.</p> <p>If the customer decides to purchase the stand-alone version of Deadline Assistant, their data, including clients, matters and calendar events, will automatically appear in the standalone Deadline Assistant. No import is required. Please note, the calendar events that import are only the events generated by Deadline Assistant, no manually entered calendar events will be imported.</p> <p><i>Please Note: When creating the new order for Standalone Deadline Assistance, be sure the order is processed so that the customer retains their Storage Key/Data Room to connect with their existing data.</i></p>
<b>What if the customer has a standalone Deadline Assistant?</b>	<p>Deadline Assistant as a product is not going away.</p> <p>For customers that have a standalone Deadline Assistant product (meaning it is NOT included within their Firm Central subscription) there is no change to how to access or utilize the product.</p>
<b>What if the customer has Westlaw?</b>	<p>There will be no change to the Westlaw products in general, however, if the customer utilized Matter Folders in Firm Central, those will now be accessible within Westlaw only. To access those Matter Folders, the customer will need to go directly into Westlaw.</p>
<b>What if the customer has Form Builder/Custom Forms?</b>	<p>For a customer who has both Firm Central and Form Builder and maintains their Form Builder subscription after the sunset, they will still be able to access their clients and matters in Form Builder.</p> <p>If the customer has an “admin” on the Firm Central side, they want to make sure that the Firm Central Admin DOES NOT empty the trash bin in Firm Central before the sunset, or those folders will be removed from Form Builder. The Firm Central Admin should also be careful not to deactivate any clients before Firm Central lapses or sunsets or those clients will show as closed in Form Builder.</p> <p>As part of Form Builder, customers have the ability to create Custom Forms. Customers access this feature via a MS Word plug-in that allows the user to customize FB forms or to create their own forms to be used in Firm Central or Form Builder. If the customer was accessing Custom Forms via Firm Central, they will lose that access. To retain those Custom Forms, it is recommended that the customer download their Custom Forms and re-create them within Form Builder.</p>
<b>I have a customer that has something called Client Portal. What is that?</b>	<p>Client Portal was a tool created for customers that have both Firm Central and Form Builder. The purpose of Client Portal was to enable the law firms client(s) the ability to upload documents to share with the law firm.</p> <p>The Form Builder team is working on an enhancement to Form Builder that would retain this feature. Once completed existing customers with Client Portal who maintain their Form Builder subscription will be able to utilize that feature, but through Form Builder instead of Firm Central.</p>
<b>The customer has extra Data Room Storage materials, what do I do with those?</b>	<p>Yes, those subscriptions should also be lapsed when you lapse Firm Central. Customers will still have access to the data via the Firm Central Dashboard tool in “read only” format until March 31, 2025</p>

**EBILLITY (Time & Billing) & AFFINIPAY**[Back to Quick Links](#)

<b>What if the customer uses eBillity?</b>	<p>For customers that utilize Time &amp; Billing via eBillity, they can continue using their Time Tracker by eBillity solution by updating their billing information in the pop-up when they next log in. After doing so, you will begin to be billed directly by eBillity. If customers have questions regarding this, please have the reach out to Joann Groninger <a href="mailto:jgroninger@ebillity.com">jgroninger@ebillity.com</a></p> <p>To be clear, LawPay (owner of eBillity) does not have contracts like we do. Customers can choose to be on a Monthly plan or an Annual plan and will have that option when they update their billing information. This also means we have no control over any price change.</p>
<b>Can the customer continue to use eBillity with Clio?</b>	Yes, eBillity and Clio can integrate, have the customer work with their eBillity and/or Clio contact to ensure they are linked.
<b>What if the customer uses Affinipay?</b>	To continue using Affinipay, you will need to contract directly with them. They will be able to assist you with any data migration. Please reach out to LawPay with any questions. LawPay Sales: 866-376-0950; <a href="mailto:sales@lawpay.com">sales@lawpay.com</a> or LawPay Support: 800-459-5798; <a href="mailto:support@lawpay.com">support@lawpay.com</a>
<b>Can the customer continue to use Affinipay w/ Clio?</b>	Yes, however we are not able to speak to what this looks like or if there are integrations between Affinipay and Clio. Please have the customer work with their Affinipay and/or Clio contact.
<b>The customer is moving to Clio, what now?</b>	If the customer has decided to transition to Clio, please have them reach out to the Clio team directly at <a href="mailto:firmcentral@clio.com">firmcentral@clio.com</a> or by visiting <a href="http://www.clio.com/firmcentral">www.clio.com/firmcentral</a>
<b>Can the customer go to a provider other than Clio?</b>	Yes, the customer is free to choose the provider that will best fit their firm's needs.
<b>What will happen on Oct 1 if customers try to access Firm Central?</b>	<p>Customers will still be able to access Firm Central after September 30, 2024, HOWEVER all of the information contained within Firm Central will be READ ONLY – this means no additions can be made to Firm Central or any documents within.</p> <p>Beginning October 1, 2024, through March 31, 2025 customers can still access a “read only” version of Firm Central and are able to access the self-serve export tool. On April 1, 2025 they will no longer have access to the dashboard or their data.</p>

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<b>We have entered into a partnership with Clio and are encouraging customers to transition over to their Firm Management solutions.</b>	<p>We have selected Clio as our Preferred Transition Partner, and we encourage you to transition to their service. Hundreds of Firm Central customers have already transitioned to <a href="#">Clio's practice management software</a>.</p> <p>Clio has extended their generous offer of 3 FREE months on any plan if customers make the move by August 30th, 2024, to give Firm Central customers enough time to transition to the Clio platform.</p> <p>Customers can contact the Clio transition team via <a href="mailto:firmcentral@clio.com">firmcentral@clio.com</a> or visit <a href="http://www.clio.com/firmcentral">www.clio.com/firmcentral</a> to learn more about Clio. The team at Clio will ensure you have a smooth migration.</p>
<b>What should this hand-off to Clio look like?</b>	If your customer(s) are interested in exploring the options available to them via Clio, please have them contact the Clio transition team directly at <a href="mailto:firmcentral@clio.com">firmcentral@clio.com</a>

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<b>Is Firm Central still being included in Digital Offers?</b>	No - any customer that had Firm Central as part of their renewal offer was removed completely from the digital offer path. There will be no digital offer connected to these accounts in SFDC. Please handle these as you normally would for accounts that do not receive a digital offer.
<b>When were customers notified about the sunset</b>	An initial communication was emailed to customers on February 7, 2024. A copy of this communication is posted on the <a href="#">Firm Central Sunset Resources</a> page in Advisor.
<b>Are there additional customer communications being planned?</b>	Yes, there will be additional customer communications.  As we move through the sunset timeline, we will be sending regular reminders to customers and hosting webinars to help them with the self-serve export process. We will share these details with you and post them to the <a href="#">Firm Central Sunset Resources</a> page in Advisor when available.
<b>Has Clio, eBillity &amp; Affinipay been contacting these customers too?</b>	We have been partnering with Clio, eBillity and Affinipay to align messaging, and will be mentioning these providers in communications. To the best of our knowledge, they haven't been reaching out to customers directly, but there is nothing in place to prevent them from doing that.

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<b>What impact (if any) is there to the customer if the Firm Central is within a ProFlex contract?</b>	If Firm Central is in a ProFlex contract: When a customer lapses their Firm Central, their ProFlex will be adjusted to reflect the removal of the value of the Firm Central portion of the ProFlex.  If Firm Central is a Standalone When a customer lapses their Firm Central, it will simply lapse and the customer will no longer receive a bill for Firm Central.
<b>A Standalone?</b>	
<b>What if the customer wants to cancel their entire contract with TR because of this sunset?</b>	Unless the customer has a valid claim for a full in contract lapse (deceased, firm dissolution, etc), they are not allowed to cancel other products simply because Firm Central is being sunset.  Time & Billing, eBillity, Affinipay, FC Extra Storage materials are all to be lapsed along with the actual Firm Central product on the account.

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<b>My customer has questions that I can't answer, where can I point them?</b>	If a customer has questions you are not able to answer, please ensure they have read through the <a href="#">External Customer Facing FAQ</a> doc. If that resource is not adequate for their needs, then connect them with the Firm Central team at: <a href="mailto:FCDatamigration@thomsonreuters.com">FCDatamigration@thomsonreuters.com</a> Firm Central Tech Support: 888-287-8537 Firm Central Support Line: 800-977-9378  Product Specialists are available: Kevin Gullickson: <a href="mailto:kevin.Gullickson@thomsonreuters.com">kevin.Gullickson@thomsonreuters.com</a> Andre King: <a href="mailto:andre.king@thomsonreuters.com">andre.king@thomsonreuters.com</a>
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