

Adding Actors in Zenas

This shows how to add Actors to a case in Zenas, whether they are already in the People database or need to be added to it.

Get Case# Search for Client Close Case New Case

< > Case# 1943 Doe, John Court Case Forms
 << >> Closed# Sample Docket
 a< >a D/Closed Client Folder D/Filing
 D/Open Mind Map Edit Record D/LastOrder
 D/CoA Stat Send Multiple Status
 Add Actor Get Actor's Info Send to One Check Contacts Log Time Add Deadline
 Set Role Name Contact Info: Phone1|Phone2|Phone3|Email Deadlines
 Due Even

To begin, click the Add Actor button.

Choose Person

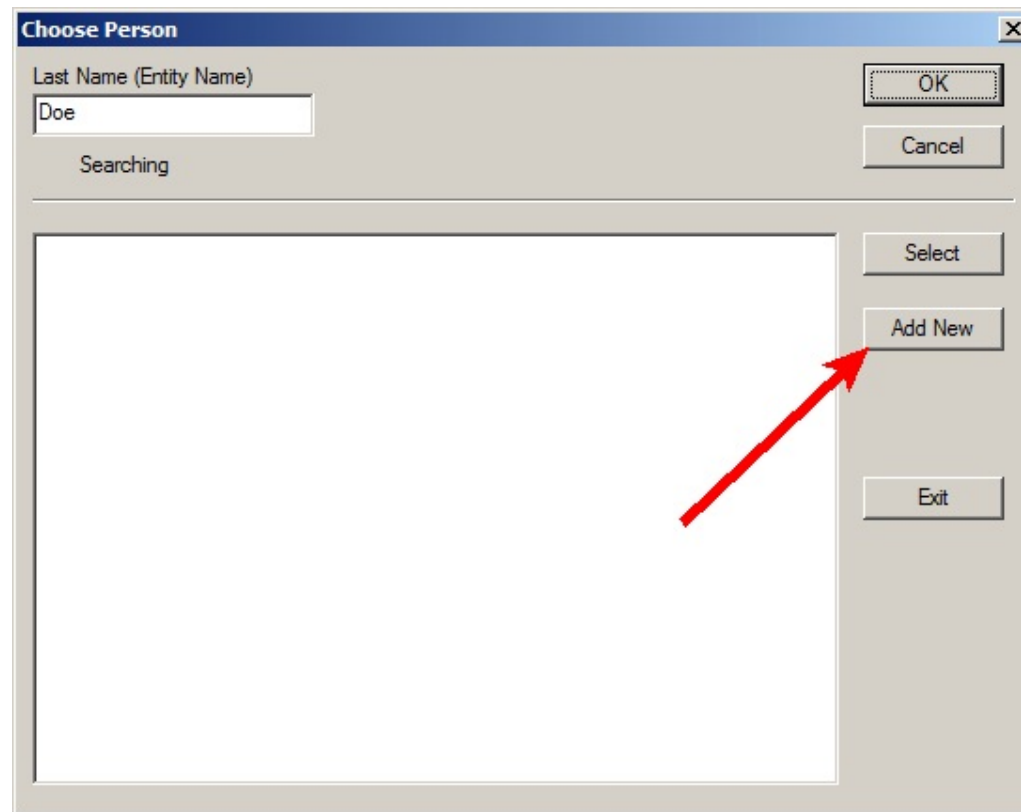
Last Name (Entity Name)
 Doe

OK
 Cancel
 Select
 Add New
 Exit

Type the last name (or company name) to be added, and click OK. Here, I typed "Doe" to add John Doe.



There are no persons with that last name in the database, as indicated by this message. So we click the Add New button.



	A	B	C	D	E	F	G	H	I	J	K	L	M
1	PNo	LName	FName	Hon	Sr	A1	A2	A3	City	St	Zip	Phone1	Phone2
2029	2028												
2030	2029												
2031	2030												
2032	2031												
2033	2032												
2034	2033	Doe											
2035													
2036													

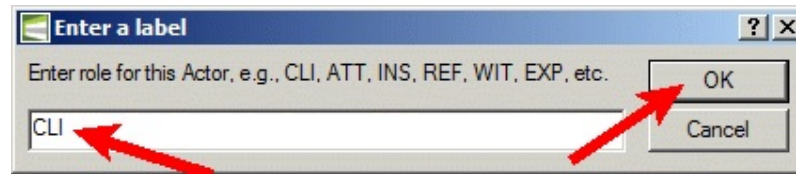
Zenas enters that data into the first new row in the People database. The user then fills in the rest of the data on that line, and then presses Enter to continue.

The screenshot shows a dialog box titled "Enter a number" with a question mark icon and a close button. The text inside the dialog reads "Enter set number for this Actor, e.g., 1, 2, 3, 4, etc.". Below the text is a text input field containing the number "1". To the right of the input field are two buttons: "OK" and "Cancel". Red arrows point to the input field and the "OK" button.

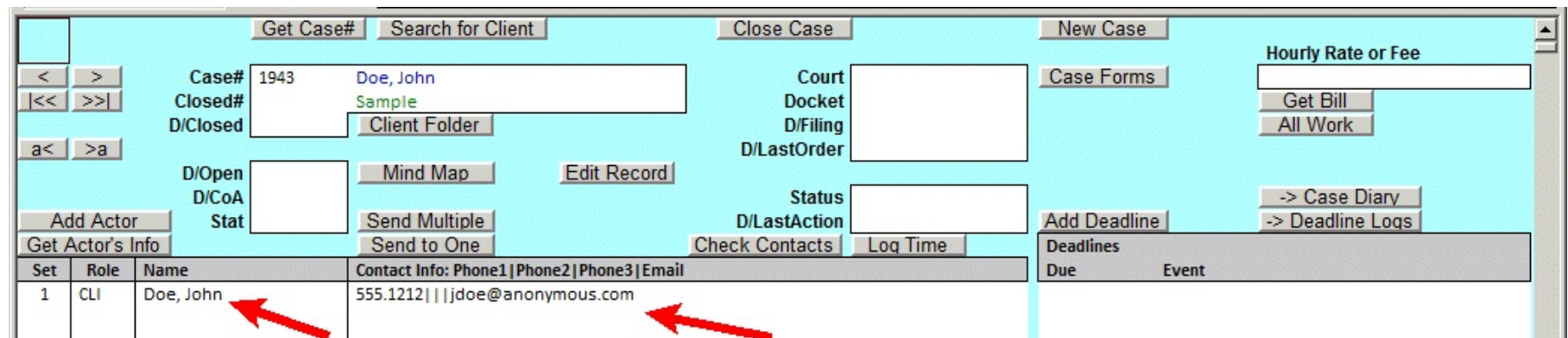
Zenas asks for a Set number for the individual. Zenas groups actors together by Set, so that you can see which lawyer (insurer, adjuster) is connected with which party.

I typically assign 1 for my client and referring lawyers; 2 for co-parties; 4 for the first set of opponents; 5 for the second, etc.; 9 for witnesses; 10 for judges and court staff.

Enter the number and press OK.

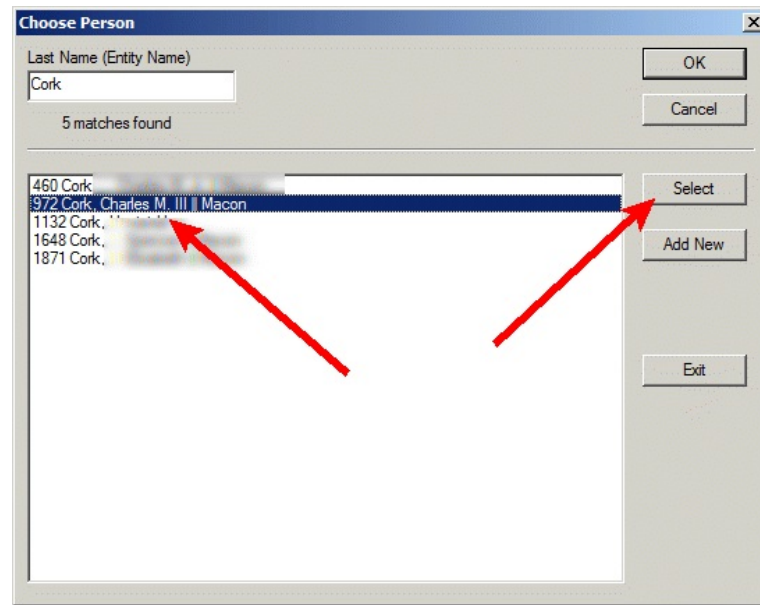


Zenas asks for the role this person has in the case. I use three letter designations, which can be combined. Type the Role and click OK.



The client has been added to the case.

Now, to illustrate the addition of someone already in the database, add me as attorney for Doe. Start by clicking the Add Actor button as before.



After typing my last name and clicking OK, Zenas shows all matches. If the desired person is in the listing, select him/her and then click the Select button. Enter the Set and Role, and Zenas then shows the person added to the case:

