

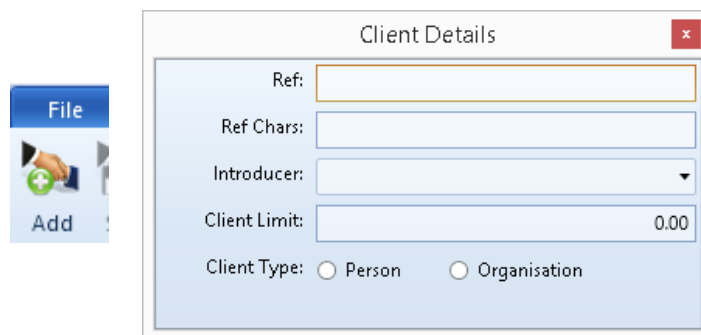
Quick Guide To Setting Up A New Client

Cases > Client

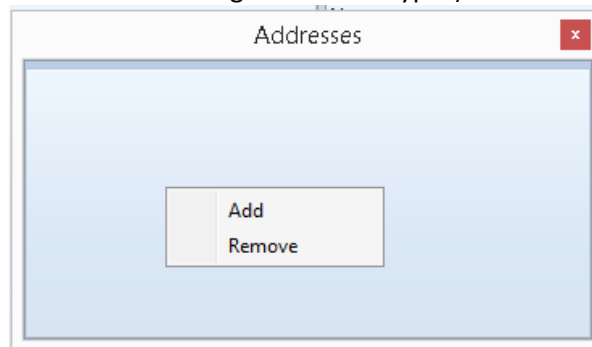


Good practice is to Search for the client to ensure we have not already set them up on the system. If we are sure they are a new client, click Add:

At this point we need to tell insight if it is a Person or an Organisation.
Fill in as much as you can:



To Add an address for the Click, right click anywhere in the Address Box, select the address type and enter the address (address type as in Home, Correspondence etc. These can be added to in System > Settings > Address Types) :



Do the Same for Contact Details. Right click and Add (Again these can be added to in System > Settings > Communication Method Types).

Click Save.

At this point the system will advise that no conflict checks have been carried out. You can ignore this and save the changes, however, if you wish to run a conflict check click No.

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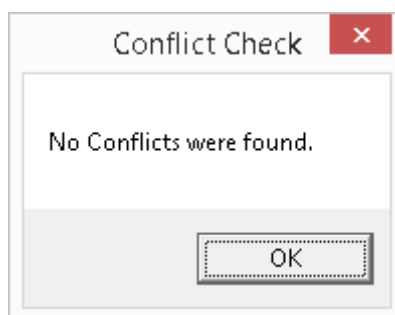
To Run a conflict check on a client:

Once you have entered as much details as possible for your new client. Right click on the Conflict Check window and click Add:

Search Date:	Done By:	Results:
Given Name:	<input type="text" value="Ryan"/>	
Family Name:	<input type="text" value="Reynolds"/>	
NI Number:	<input type="text" value="NI882234B"/>	
Address Line 1:	<input type="text" value="19 Victory Road"/>	
Post Code:	<input type="text" value="BT34 8XX"/>	
Contact Method:	<input type="text" value="RReynolds@gmail.com"/>	
Contact Method:	<input type="text" value="07752 658214"/>	

Conflict Check | Notes | Document Registers | User Data

This will show you what the conflict check will be run on. Right Click in Results and select Run Search:



If no conflicts found click ok. The system will search for anyone that is in Victory Road, this will include descriptions on Cases.

It will give you the option to view the Case or Client to ensure we do have a conflict of interests on the system. If all ok, right click in the Results window and select Accept Results. This will record a date & time and the user that ran the conflict check.

Again, hit Save in the top left.