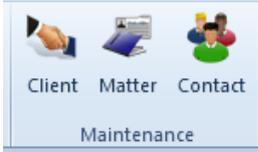


Quick Guide To Setting Up A New Matter

Cases > Matter



Good practice is to Search for the matter to ensure we have not already set it up on the system. If we are sure we are not duplicating a case, click Add:

Matter ✕

Branch:	A - Northern Ireland
Department:	CON - Conveyance
Matter Type:	C-ConSC - Conveyance Sale Cor
Restricted:	<input type="checkbox"/>
Description:	Sale of Unit 3g Duncrue Ind Est, Anytown
Mat Ref:	
Alternate Ref:	
Opened:	02/08/2017
Closed:	
Estimated Bill:	
Archive Location:	
Costs Quotation:	650.00
Disbs Quotation:	200.00
Introducer:	
Review Period:	Months
Charge Rate:	R2 - Fee Earner Rate £250ph
Risk Level:	Low
Office Bank:	O1 - Northern Bank
Client Bank:	C1 - Northern Bank
Deposit Bank:	D1 - Halifax High Yield

* is Required

*Select, the Branch, Department and Matter type from the drop-down lists. These can be added to under System > Settings – Departments or Matter Types.

The Restricted box can be selected at this stage, it will only allow the Fee Earner Responsible access to the case. This can be used for Private matters that only the Fee Earner can see.

*It is good practice to put more on the Description, this is enable more accurate searches and can be merged to client letters.

The Alternate Ref is a searchable field, this can be used for your old system reference (if any) or a specific in house reference used.

*Ensure the open date is correct.

Ignore the Closed box, it is only filled in when the matter is set to archive.

The Estimated Bill Date is when you estimate to complete the case. This can provide a basic Cash Flow if filled in as we can run a report with the estimated bill dater and the Cost Quotation/Disbs Quotation.

The Introducer is how the matter came to the firm. If you have run an add in a local paper, an introducer can be setup (System > Settings – Introducers) and recorded on the case.

Review Period (Months). This allows us to put a date in so we can review the file on a set period.

*Charge Rate is the rate is the Time Recording rate for the Case.

Risk Level can be entered for the case.

Banks can be selected or left blank for the accounts person to decide what bank to use.

Quick Guide To Setting Up A New Matter

A matter can be setup without a client. This would be used for Non-Chargeable time recording on the system or the client has not been finalised for case.

To add a Client or Clients to a matter, Click the . This will swipe out a search box:

Type in the name of the client you wish to add, the list underneath will populate, select the client.

Matter Clients	
← smith	Clients on this matter
New	
SMI1 Mr John Smith	Ref: SMI1 Name: Mr John Smith
SMI2 Mrs June Smith	

You can add a second client to the case (ie, Mr John Smith is the first client, we may need to add Mrs June Smith his wife). Click on Mrs June Smith from the list, you can see the Clients on this matter are now Mr John Smith and Mrs June Smith (If you click the New button it will hide the Search):

Matter Clients	
← smith	Clients on this matter
New	
SMI1 Mr John Smith	Ref: SMI1 Name: Mr John Smith
SMI2 Mrs June Smith	Ref: SMI2 Name: Mrs June Smith
SMI3 Mr Robert Smith	

Finally we need to select the Fee Earners who will be working on the case. Click on the Fee Eainers box at the bottom of the screen, right click in the area and goto Add. A Fee Earner Responsible must be added. Right click again if you wish to add a case worker:

Fee Earners	
Fee Earner Responsible	DO - Mr Darren Ogle
Case Worker	JS - Mr John Smith

Click the Save in the Top Left of the Matter Maintenance window. You will notice that the Matter Ref: is now populated. Insight use the matter reference as the Unique Case Identifier. Each case is given the prefix of the department (in this case CON) and the next consecutive number (in this case CON26). Our practice has 26 Conveyance cases in the system.