

Adding Additional Matters for a Client

Description of additional matters feature.

You can setup additional matters for a client. When you do, Fees and Costs for separate matters will be Grouped by matter name and subtotaled by matter on the client's statement.

If there are no fees and costs for a matter for a statement billing period, the matter will not appear on the statement.

Balances due, trust balances and retainer balances are reported only by client not by matter.

Payments, Trusts and Retainers are posted and reported only by client not by matter.

Setting up a new matter for a client.

Make sure your office is setup for multiple matters per client. Go to Settings then to Client Settings tab and make sure the top item left side: "Enable multiple matters per client" is checked then Save.

Go to Client Screen, select the client for whom you are opening another matter. On the right side of the screen you will see the Matter line, click Add.

The system will suggest a consecutive matter number: 0001, then 0002, 0003 etc. You can change that number to any four-digit number.

Enter a Name for the Matter. Each matter with current fees and costs will display on the client's statement in alphabetic order. For ease of changing matter information and finding matters, on the Client's screen, matters when displayed with the drop-down arrow, are in number order.

You can assign a matter to a practice area now or anytime.

There is also a place to more fully describe the matter. This description will appear on the client's statement.

Attorney and non-attorney hourly rates can be different for each client's matter. Change hourly rates as you would normally (instructions in Help).

Identifying and entering Fees and Costs to a Matter on the Log:

Once you have selected "multiple matters" in Settings, the Log will display a matter textbox for selecting/entering the matter to which fees and costs will be entered.

Changing Information about the matter.

Go to the Clients Screen. Select the client on the left and on the right select the matter from the drop down. You can change the matter name, practice area, description and hourly rate. After change - Be sure to Save.

End