

(How To) When to Add A Matter or Open a New Client:

Payments, trusts and retainers do not apply to each matter. If you want payments, trusts and retainers to apply to each matter, open a separate client for that matter. You can copy and paste from one client to another. Also if you are going to want a separate statement for the matter, open a separate client. Multiple matters print on the same statement with one beginning balance and one balance due for all matters.

End