

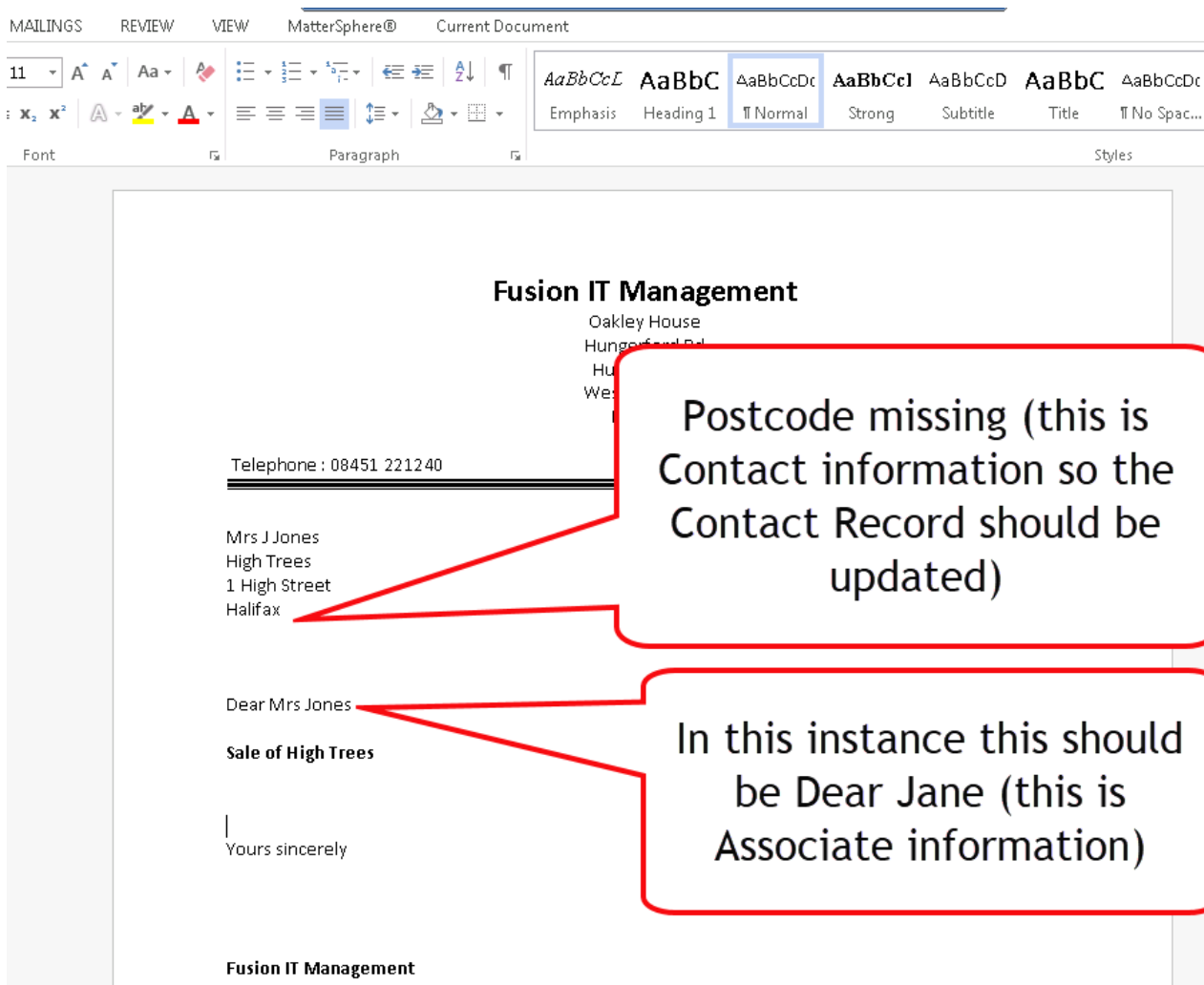
# MatterSphere V7.2

## Update Associate Details in a Document

When you are in a document and notice that there is some incorrect detail that has been brought through the automatic fields, you cannot simply manual amend in the document because:

1. When you go to save/print the document will update the fields automatically and bring the original data back through so it will still be incorrect
2. You need to update the information so that it will be correct when anyone else needs to use that Associate.
3. You need to make a decision on whether the amended detail is just relevant for that Associate on that matter or whether it is relevant to change the Contact detail.

See the example below



The screenshot shows a Microsoft Word document with the following content:

**Fusion IT Management**  
Oakley House  
Hungersford Rd  
HU  
We:

Telephone : 08451 221240

Mrs J Jones  
High Trees  
1 High Street  
Halifax

Dear Mrs Jones

**Sale of High Trees**

Yours sincerely

**Fusion IT Management**

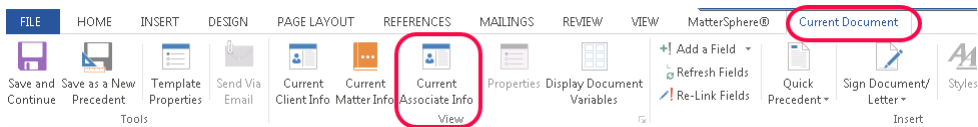
Two red callout boxes highlight specific issues:

- A callout box points to the address "High Trees" and contains the text: "Postcode missing (this is Contact information so the Contact Record should be updated)".
- A callout box points to the salutation "Dear Mrs Jones" and contains the text: "In this instance this should be Dear Jane (this is Associate information)".

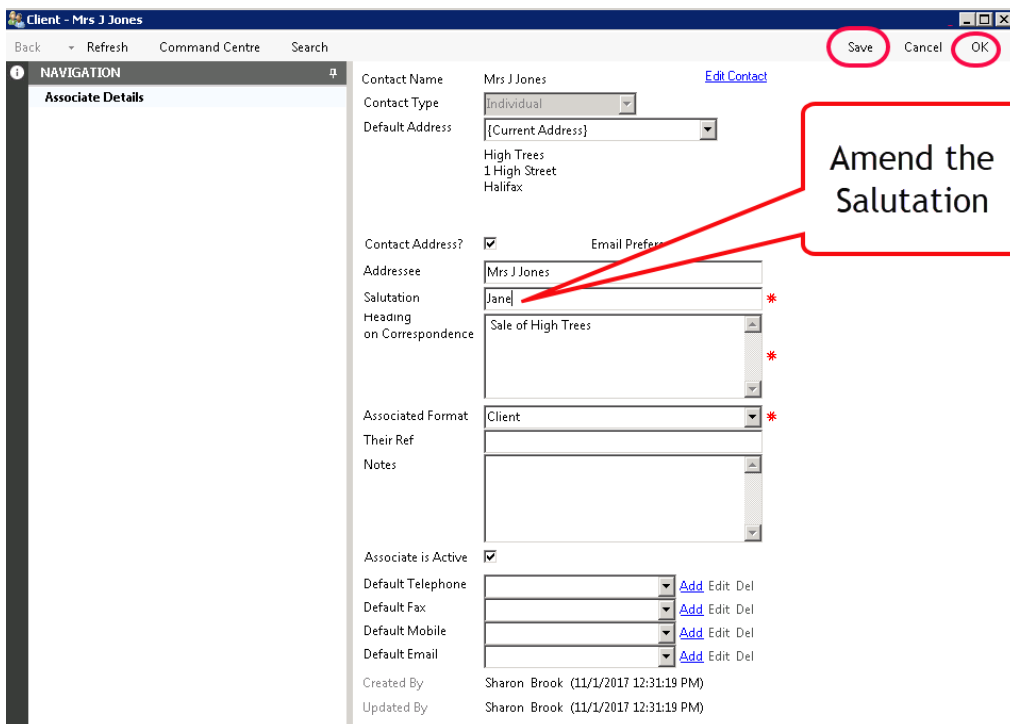
## Update Associate Information

☞ Click on Current Document Tab

☞ Select Current Associate Info



Change the necessary details on the Associate Details screen



The screenshot shows the 'Associate Details' screen for 'Mrs J Jones'. The 'Salutation' field is set to 'Jane' and is highlighted with a red callout box that says 'Amend the Salutation'. Other fields include 'Contact Name' (Mrs J Jones), 'Contact Type' (Individual), 'Default Address' (High Trees, 1 High Street, Halifax), 'Contact Address?' (checked), 'Addressee' (Mrs J Jones), 'Heading on Correspondence' (Sale of High Trees), 'Associated Format' (Client), and 'Associate is Active' (checked). The 'Save', 'Cancel', and 'OK' buttons are also visible at the top right.

☞ Click Save & OK to complete

## Update Contact Information

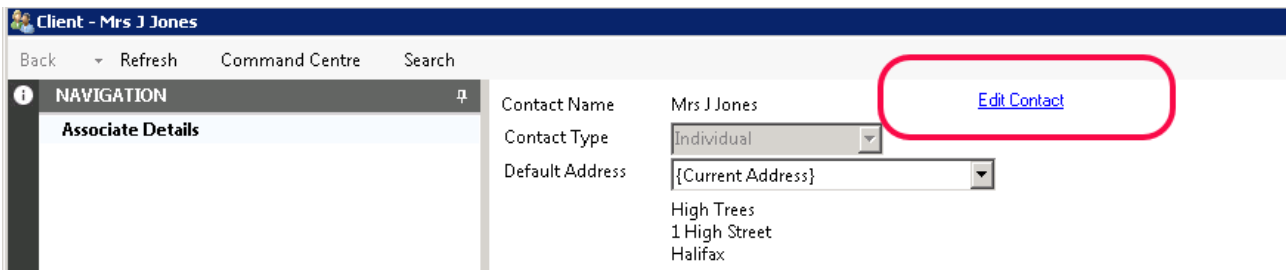
☞ Click on Current Document Tab

☞ Select Associate Info

☞ Select Edit Contact

**REMEMBER** – you must only edit the contact information for detail that is relevant to the Contact across any matter that they may be associated with and not just the one you are working on.

☞ Click Edit Contact



Client - Mrs J Jones

Back Refresh Command Centre Search

NAVIGATION

Associate Details

Contact Name Mrs J Jones [Edit Contact](#)

Contact Type Individual

Default Address {Current Address}

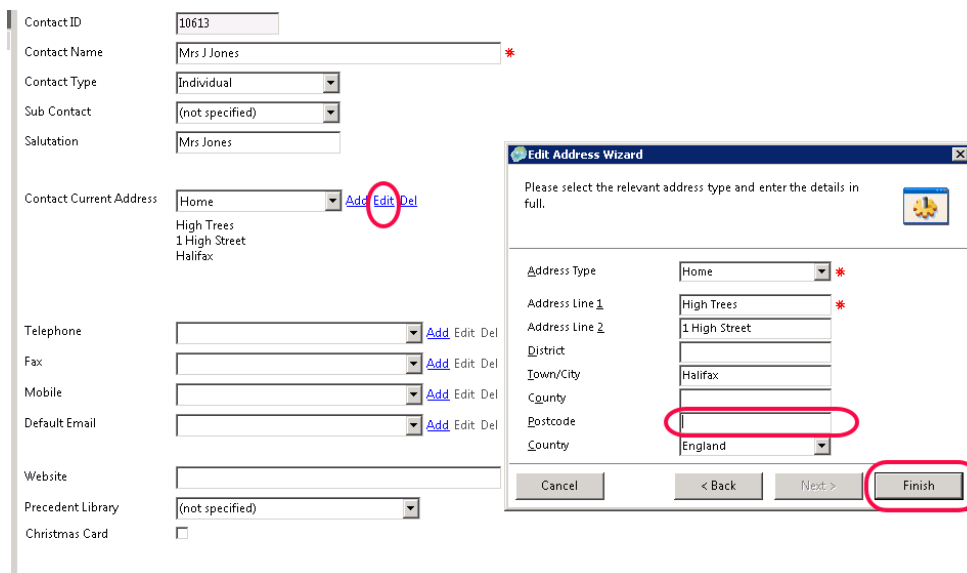
High Trees  
1 High Street  
Halifax

On the Contact Record change the relevant detail

☞ Click on Edit Address

☞ Type in the relevant Postcode

☞ Click Finish



Contact ID 10613

Contact Name Mrs J Jones \*

Contact Type Individual

Sub Contact (not specified)

Salutation Mrs Jones

Contact Current Address Home [Add](#) [Edit](#) [Del](#)

High Trees  
1 High Street  
Halifax

Telephone Add Edit Del

Fax Add Edit Del

Mobile Add Edit Del

Default Email Add Edit Del

Website

Precedent Library (not specified)

Christmas Card

**Edit Address Wizard**

Please select the relevant address type and enter the details in full.

Address Type Home \*

Address Line 1 High Trees \*

Address Line 2 1 High Street

District Halifax

Town/City Halifax

County

Postcode

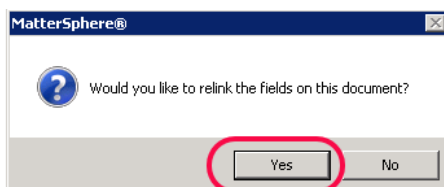
Country England

Cancel < Back Next > **Finish**

☞ Click OK

## Updating Letter/Document

You will see an information box appear please click on yes this will update the fields in the document



MatterSphere@

Would you like to relink the fields on this document?

Yes No

All information is now updated in this letter and for future in this matter and contact record.