

MatterSphere (v7.2)

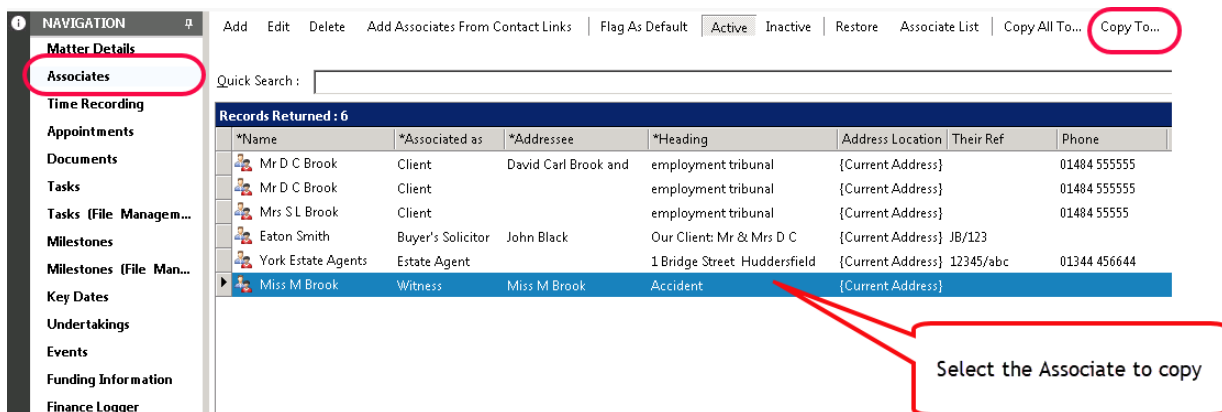
Copy Associates

MatterSphere will allow you to copy one or all of the Associates from one matter to another within the same Client list.

Copy Associate

Open the matter containing the Associate/s you wish to copy.

- ☞ Click on **Associate Tab**
- ☞ Select the Associate to copy
- ☞ Click on the **Copy To...** button



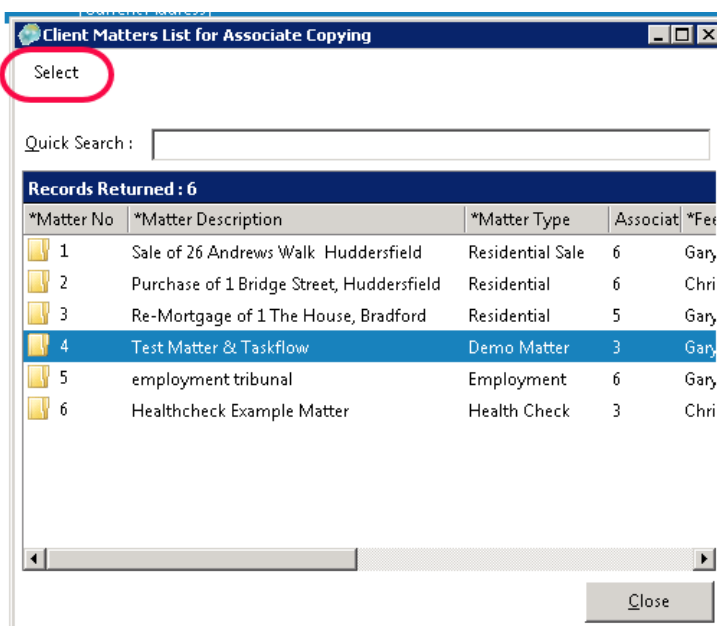
Quick Search :

*Name	*Associated as	*Addressee	*Heading	Address Location	Their Ref	Phone
Mr D C Brook	Client	David Carl Brook and	employment tribunal	{Current Address}		01484 555555
Mr D C Brook	Client		employment tribunal	{Current Address}		01484 555555
Mrs S L Brook	Client		employment tribunal	{Current Address}		01484 555555
Eston Smith	Buyer's Solicitor	John Black	Our Client: Mr & Mrs D C	{Current Address}	JB/123	
York Estate Agents	Estate Agent		1 Bridge Street Huddersfield	{Current Address}	12345/abc	01344 456644
Miss M Brook	Witness	Miss M Brook	Accident	{Current Address}		

Select the Associate to copy

The Client Matters List will now be displayed showing all the available matters for this client that you are able to copy the Associate to.

- ☞ Select the Associate and Click **Select**



Quick Search :

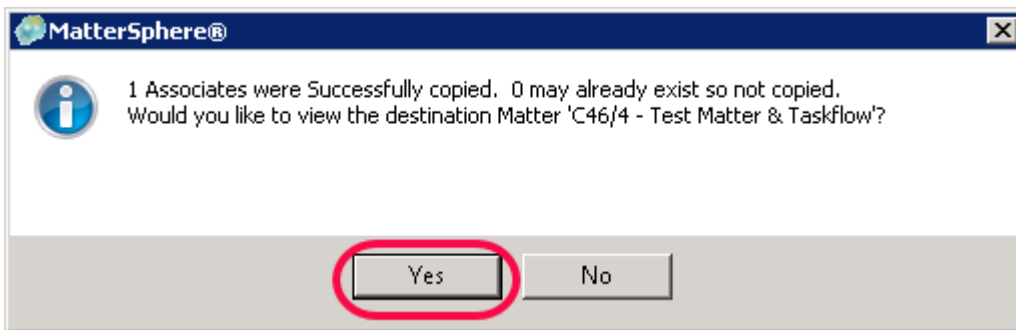
*Matter No	*Matter Description	*Matter Type	Associat	*Fee
1	Sale of 26 Andrews Walk Huddersfield	Residential Sale	6	Gary
2	Purchase of 1 Bridge Street, Huddersfield	Residential	6	Chri
3	Re-Mortgage of 1 The House, Bradford	Residential	5	Gary
4	Test Matter & Taskflow	Demo Matter	3	Gary
5	employment tribunal	Employment	6	Gary
6	Healthcheck Example Matter	Health Check	3	Chri

Select

Close

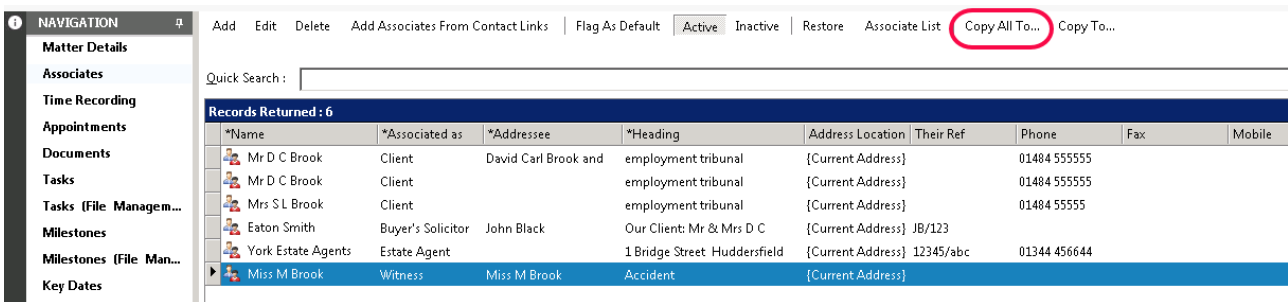
An information window will appear either confirming successful copying or that it could not be copied.

☞ Click on **Yes** to open the matter



Copy All Associates

Following the previous steps once you are on the Associates tab click on **Copy All To....**



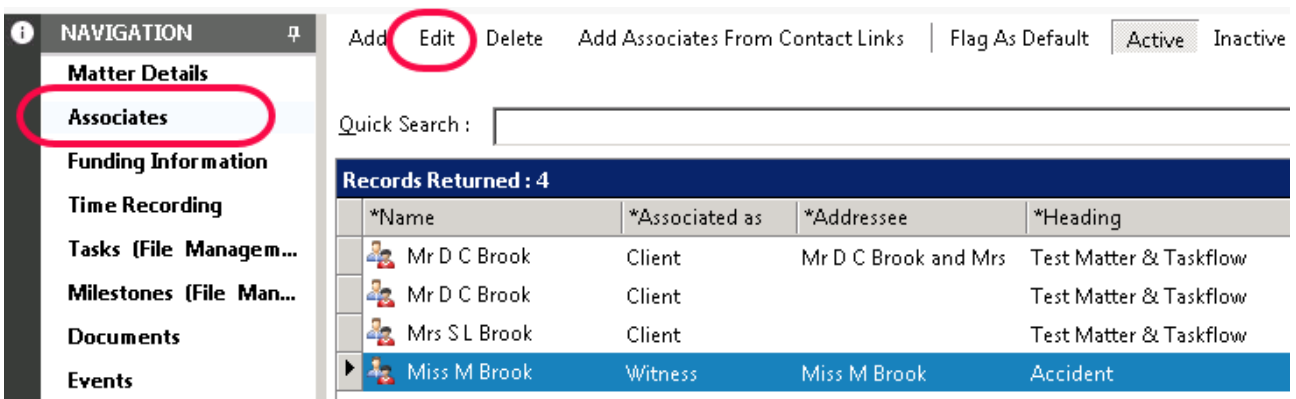
All the steps are the same as previously described

Update Associate Details

Once you are viewing the matter you have copied the Associate to you will need to check and possibly update the Associated information.

☞ Select the **Associates Tab**

☞ Click on the Associate that has now been copied and either double click or select **Edit**



From the Edit screen you can amend limited information that relate to this Associate on this matter only.

- Addressee
- Salutation
- Heading on Correspondence
- Associated Format
- Their Ref

☞ Click **Save** when changes made

Contact Name	Miss M Brook	Edit Contact
Contact Type	Individual	
Default Address	{Current Address}	
	The House Salterhebble Halifax	
Contact Address?	<input type="checkbox"/>	
Addressee	Miss M Brook	
Salutation	Miss Brook	*
Heading on Correspondence	New Matter	*
Associated Format	Buyer	*
Their Ref		
Notes		
Associate is Active	<input checked="" type="checkbox"/>	
Default Telephone		Add Edit Del
Default Fax		Add Edit Del
Default Mobile		Add Edit Del
Default Email		Add Edit Del