

MatterSphere V7.2

Update Matter 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 Matter.

See the example below

TELEPHONE NOTE INWARD

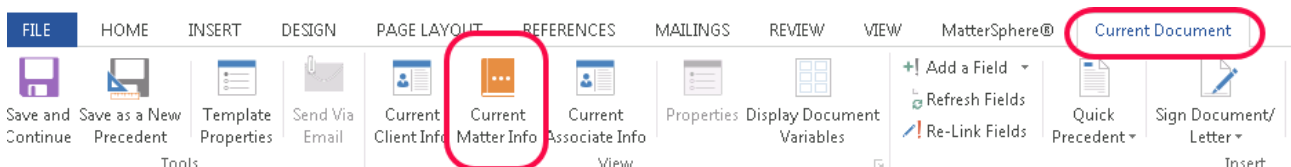
Caller: Gary Colclough
Date & Time: Friday, January 19, 2018
Main Contact: Mr Gary Colclough
Transaction: Taskflow - Sale
Reference: GMC/SLB/C1-2
Doc Reference: <<DOCREF>>

Incorrect Matter details -
should be Sale of Taskflow
House, Huddersfield

Update Matter Information

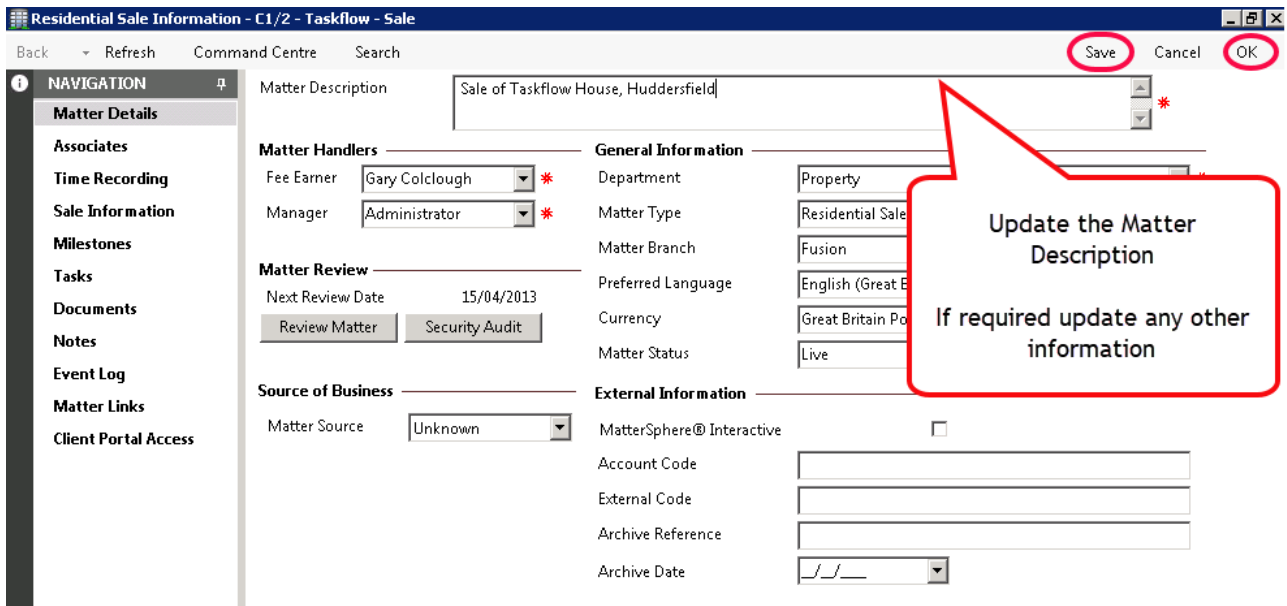
☞ Click on **Current Document Tab**

☞ Select **Current Matter Info**



Change the necessary details on the Matter Details screen

☞ Click **Save** and then **OK** when complete



Residential Sale Information - C1/2 - Taskflow - Sale

Back Refresh Command Centre Search Save Cancel OK

Matter Description: Sale of Taskflow House, Huddersfield

Matter Handlers

Fee Earner: Gary Colclough *
 Manager: Administrator *

Matter Review

Next Review Date: 15/04/2013
 Review Matter Security Audit

Source of Business

Matter Source: Unknown

General Information

Department: Property *
 Matter Type: Residential Sale
 Matter Branch: Fusion
 Preferred Language: English (Great B
 Currency: Great Britain Po
 Matter Status: Live

External Information

MatterSphere@ Interactive:
 Account Code:
 External Code:
 Archive Reference:
 Archive Date:

Update the Matter Description
 If required update any other information

Updating Letter/Document

On returning to the document you will need to Re-link the fields to update the document.

- ☞ Select **Current Document Tab**
- ☞ Click **Re-Link Fields**

All information is now updated in this document and in the Matter Record.