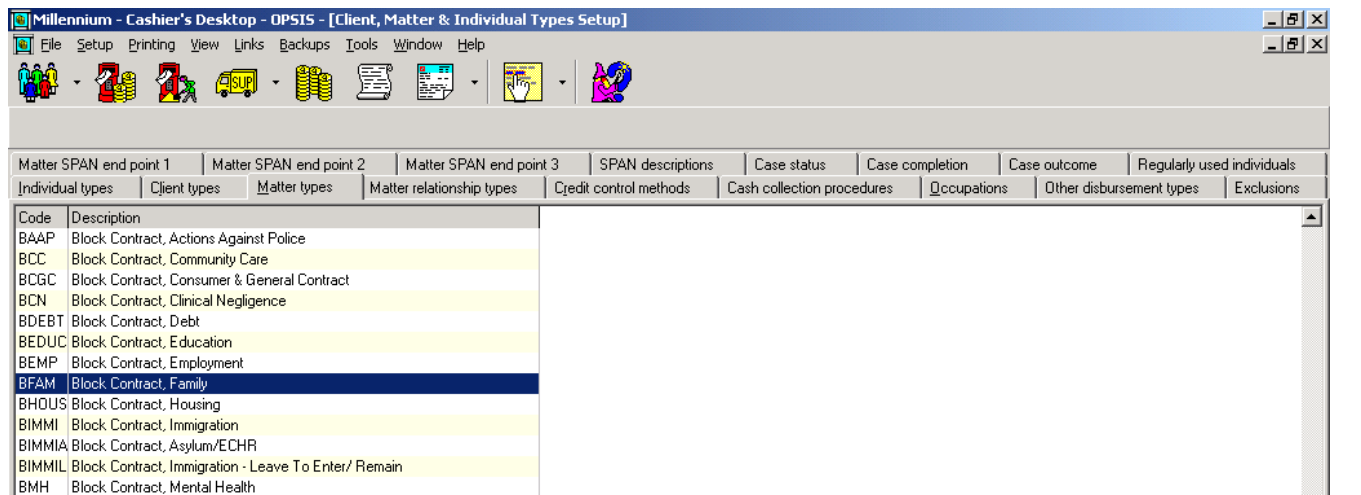


How to Add/Edit a Matter Type

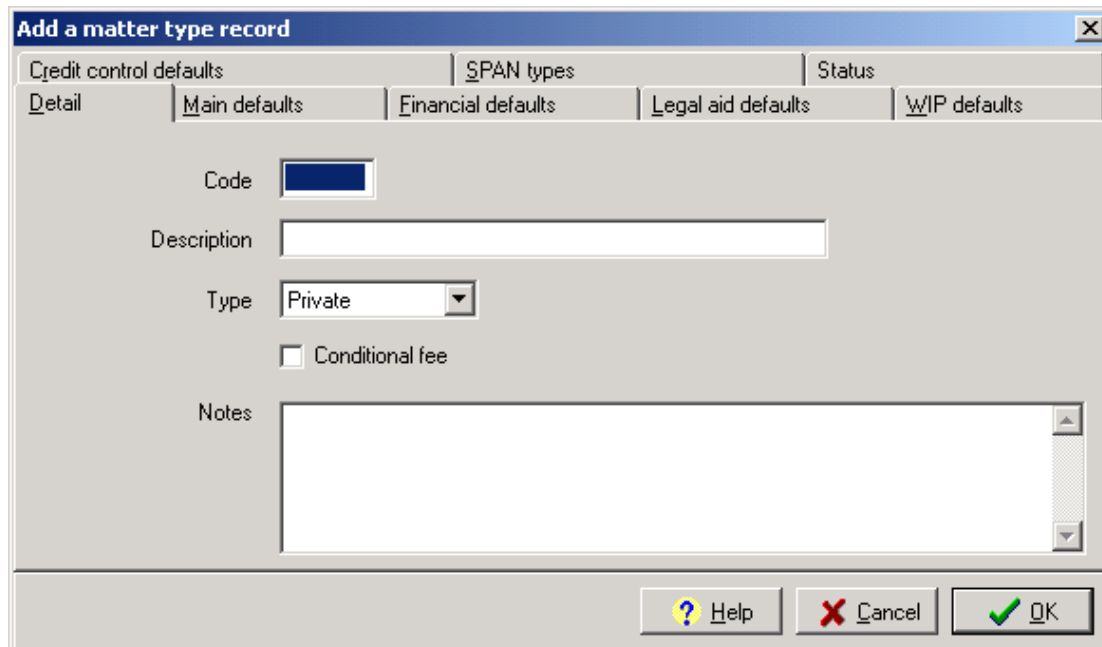
Add

Within Millennium there are a series of Matter Types that have been created to help with the opening of matters. On these you can set up defaults, so that they ‘drop’ into the relevant boxes at the point of opening.

Go to:- **Set Up > Client Matter & Individuals Types > Matter Types**



To Add a new one click on ‘ADD’



On the ‘DETAIL’ tab fill in a code, a description and possibly change the type from Private to Legal Aid.

For example:-

The screenshot shows the 'Add a matter type record' dialog box with the 'Main defaults' tab selected. The fields are as follows:

- Code:** CRREPC
- Description:** Criminal Representation CROWN COURT ONLY
- Type:** Legal aid (dropdown menu)
- Conditional fee:**
- Notes:** (Empty text area)

Buttons at the bottom: ? Help, X Cancel, and a green checkmark OK.

Now go to ‘MAIN DETAILS’

The screenshot shows the 'Add a matter type record' dialog box with the 'Main details' tab selected. The fields are as follows:

- Branch:** (Empty dropdown menu)
- Department:** Litigation
- Source:** (Empty dropdown menu)
- Fee type:** 012 (with icon) Crime Crown Court
- Executive:** IBD (with icon) I. B. Dunne
- Partner:** A.J.C (with icon) A. J. Grabbit

Buttons at the bottom: ? Help, X Cancel, and a green checkmark OK.

Fill in details as required, bearing in mind that details will go in on all matters created for this matter type.

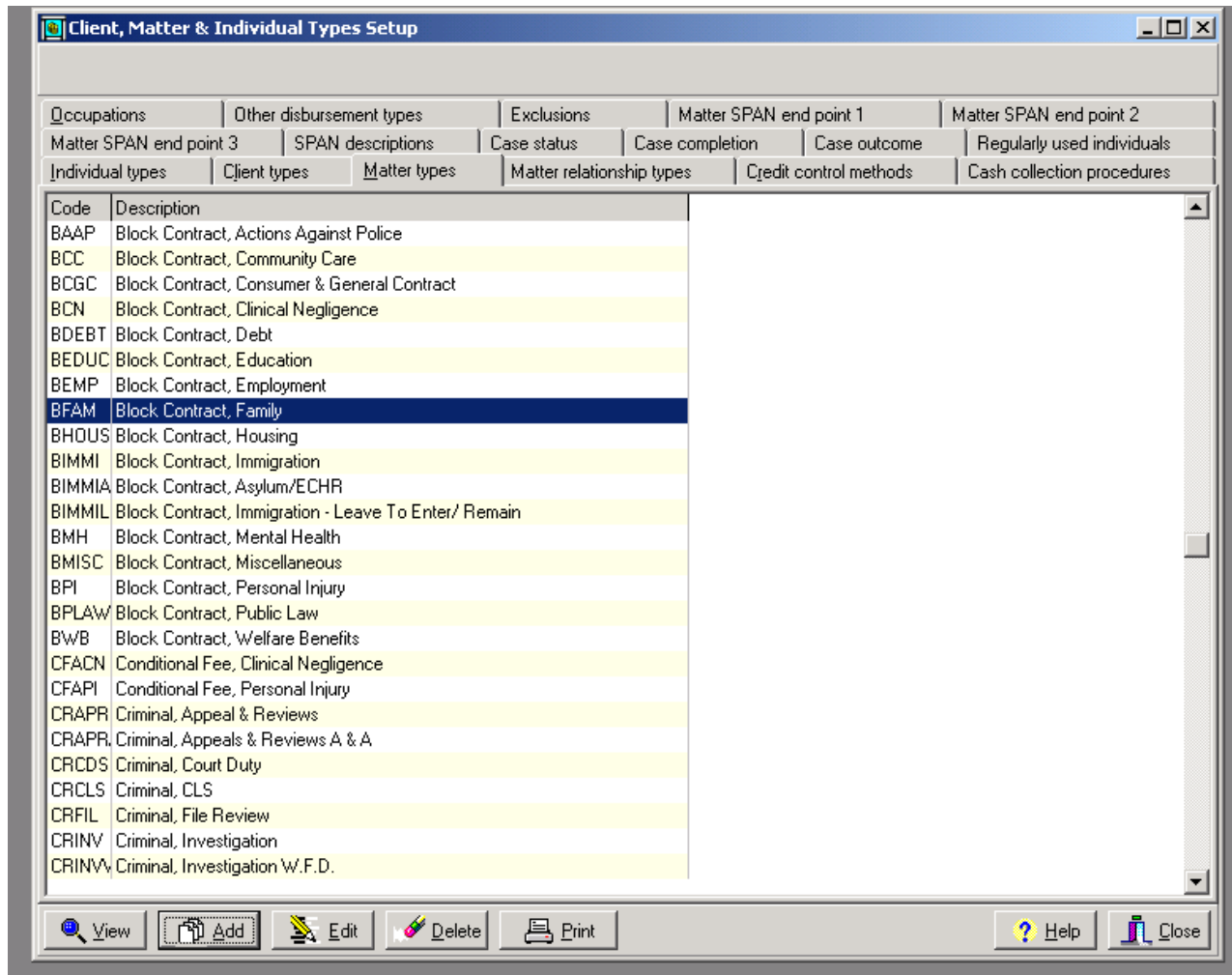
Once all the defaults that you require have been entered click on ‘OK’.

Matter type is now ready to use.

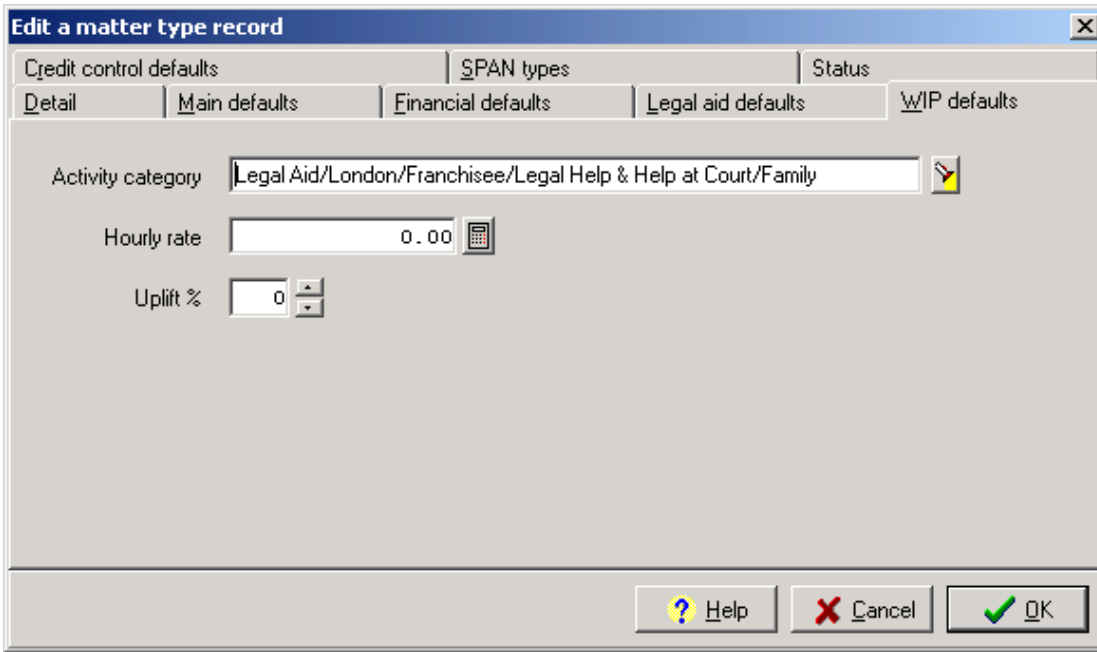
Editing

Go to **Set Up > Client Matter & Individual Types > Matter Types**

Hi-light the matter type you wish to edit and click on **'EDIT'** at the bottom of the screen.



Now click on **'EDIT'** and change details as required. For example to put in a default for the WIP, click on **'WIP'**



Edit a matter type record

Credit control defaults | SPAN types | Status

Detail | Main defaults | Financial defaults | Legal aid defaults | WIP defaults

Activity category: Legal Aid/London/Franchisee/Legal Help & Help at Court/Family

Hourly rate: 0.00

Uplift %: 0

Help | Cancel | OK

Click on 'OK'

When you edit a matter type the changes only apply to new matters that are opened from this point onwards.