

# Creating a New Matter Manual

This manual is designed to help users understand how to create a new matter in OnePractice.



## Creating a New Matter

Create a new matter for a client that already exists or as part of the process when creating a new client.

### *If the client already exists*

- + Search in OneView for the Client name or search on the matter description to check if the client/matter has been already created (see Figure 1 below)
- + Select the client so the middle screen shows the client's details

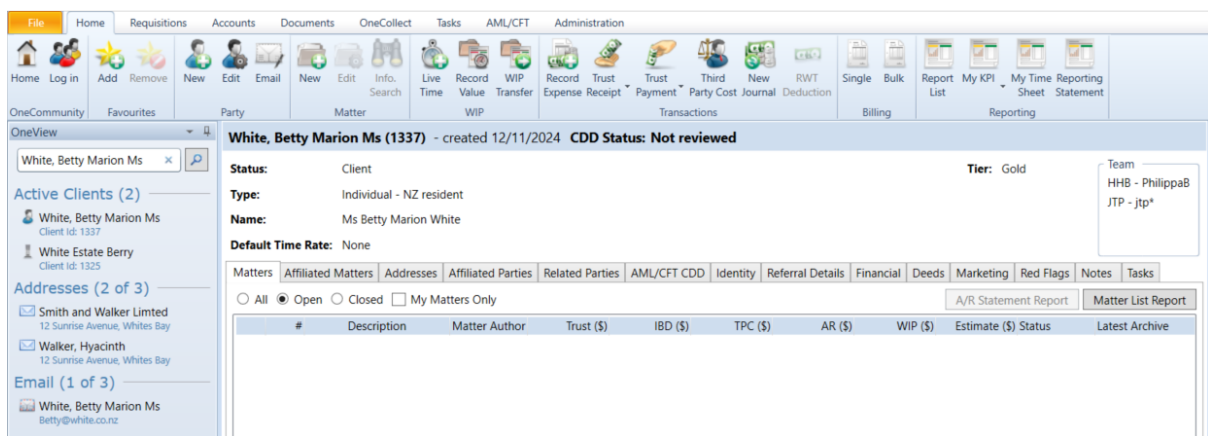


Figure 1.

- + Then select the 'New' button under 'Matter' on the ribbon (see Figure 2 below)

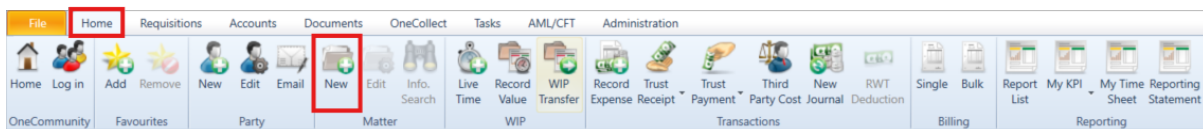


Figure 2.

- + Type in the matter description (see Figure 3 below)
- + Select if the matter will have a physical file
- + The trust account will be automatically selected (unless there is more than one trust account, in which case, select from the dropdown menu)
- + Fee Type – select from the dropdown menu
- + Sub Fee Type – select from the dropdown menu
- + Captured Activity – if the selected fee type is a captured activity, this will be ticked on. If the selected fee type is not a captured activity, this will not be ticked on. Tick on if necessary
- + Some fee types are set to capture the Estimated AML/CFT Value for CDD reporting purposes i.e. the sale/purchase price of a conveyancing transaction – insert this if available
- + Default time rate – select if required. NONE will default to the standard default

Figure 3.

- + Party Details are not compulsory but can be added using the green plus or search database by typing the name (client with number – non-client without number) (see Figure 4 below)

The screenshot shows the 'Create Matter' window with the following sections:

- Matter details:** Client: 1337 - White, Betty Marion Ms - 144 New...; Description: Purchase 149 Zemi Street; Trust account: Clarke Cooper Law Trust; Fee type: Conveyancing; Sub fee type: Residential; Estimated AML/CFT value: \$950,000.
- Matter team:** Harry Hazza, John Terry Potter; Matter author: John Terry Potter.
- Party details (highlighted in red):** Counter party: Rogers, Mickey; Firm acting: TH Law Limited - P O Box 689, Ferndale, C...; Lawyer acting: Jones, David Mr - 027 249 7583; Instructing party: (empty).
- Billing details:** Default GST rate on fees: Standard; Billing party: (empty); A/R contact party: (empty); Billing classification: Manual; Fees: (empty); Costs/disbursements: (empty).
- Nature & purpose of business relationship:** Current: (No value); New: (empty).

Figure 4.

- + A new Nature & purpose can be set when creating a matter. This will be visible at client level under the AML/CFT CDD tab (see Figure 5 below)

Figure 5.

- + The Matter team will default to the Client team and the Matter author to the Client author. Edit these details as required (see Figure 6 below)

The screenshot shows the 'Create Matter' interface with the following sections:

- Matter details:** Client: 1337 - White, Betty Marion Ms - 144 New...; Description: Purchase 149 Zemi Street; Trust account: Clarke Cooper Law Trust; Fee type: Conveyancing; Sub fee type: Residential; Estimated AML/CFT value: \$950,000.
- Party details:** Counter party: Rogers, Mickey; Firm acting: TH Law Limited - P O Box 689, Ferndale, C...; Lawyer acting: Jones, David Mr - 027 249 7583.
- Nature & purpose of business relationship:** Current: (No value); New: (Empty field).
- Matter team (highlighted):** Edit Team, Remove Team, Confidential matter checkbox, Harry Hazza, John Terry Potter, Matter author: John Terry Potter.
- Billing details:** Default GST rate on fees: Standard; Billing party, A/R contact party, Billing classification: Manual, Ready to bill checkbox, Fees, Costs/disbursements.
- Print label on save:** Front label, Side label.

Figure 6.

- + The default GST rate for invoices can be left at Standard or set to Zero Rated (see Figure 7 below)
- + Set the billing details here if the bills are to be sent to a different party/address
- + Add an A/R contact – search the database first by typing in the name. If not already created, then select the green plus to add these. They will be created as non-clients
- + Billing Classification – select from the drop-down menu. Options are Manual, Progress Bill or Monthly Bill
- + Add an estimate for fees and/or costs/disbursements - the billing threshold will change when time is recorded against the matter and costs/disbursements are posted. The estimate shows on the matter as below (see Figure 8 below)

Figure 7.

**Purchase 149 Zemi Street (1337.1)** - created 13/11/2024

**Client:** [White, Betty Marion Ms](#) **Customer Due Diligence Required**

**Description:** Purchase 149 Zemi Street

**Fee Type:** Conveyancing - Residential

**Trust Account:** Clarke Cooper Law Trust

**Default Time Rate:**

Team

- HHB - PhilippaB
- JTP - jtp\*

**Financial Summary**

**1337.1**

Trust	0.00
WIP	0.00
IBD	0.00
AR	0.00
Estimate	2,900.00
TPC	0.00
Headroom	2,500.00

Date	Type	Reference	Narration	Billed	Funds Out(\$)	Funds In(\$)	Balance(\$)
(Empty table body)							

Figure 8.

- + If the firm has a label printer set up, tick the box/es for the required labels and use the dropdown menu to select the label printer (once selected, this printer will auto-populate the next time a matter is created) (see Figure 9 below)

The screenshot shows the 'Create Matter' window with the following details:

- Matter details:** Client: 1337 - White, Betty Marion Ms - 144 New...; Description: Purchase 149 Zemi Street; Trust account: Clarke Cooper Law Trust; Fee type: Conveyancing; Sub fee type: Residential; Estimated AML/CFT value: \$950,000.
- Party details:** Counter party: Rogers, Mickey; Firm acting: TH Law Limited - P O Box 689, Ferndale, C...; Lawyer acting: Jones, David Mr - 027 249 7583.
- Matter team:** Harry Hazza, John Terry Potter; Matter author: John Terry Potter.
- Billing details:** Default GST rate on fees: Standard; Billing classification: Manual; Billing threshold: [blank].
- Print label on save (highlighted):**
  - Front label
  - Side label
  - Printer selection dropdown: [blank]

Figure 9.

+ Click 'Save & Close' (see Figure 10 below)

**Create Matter**

**Details** | InfoSheets

**Matter details**

Client: 1337 - White, Betty Marion Ms - 144 New...

Description:

Physical File

Trust account:

Fee type:

Sub fee type:

Captured activity

Estimated AML/CFT value:

Default time rate:

**Matter team**

Confidential matter

Harry Hazza  
John Terry Potter

Matter author: **John Terry Potter**

**Party details**

Counter party: Rogers, Mickey

Firm acting: TH Law Limited - P O Box 689, Ferndale, C...

Lawyer acting: Jones, David Mr - 027 249 7583

Instructing party:

**Nature & purpose of business relationship**

Current:

New:

**Billing details**

Default GST rate on fees:

Billing party:

A/R contact party:

Billing classification:   Ready to bill

	Estimated	Billing threshold
Fees:	<input type="text"/>	<input type="text"/>
Costs/disbursements:	<input type="text"/>	<input type="text"/>

Print label on save

Front label

Side label

Figure 10.