

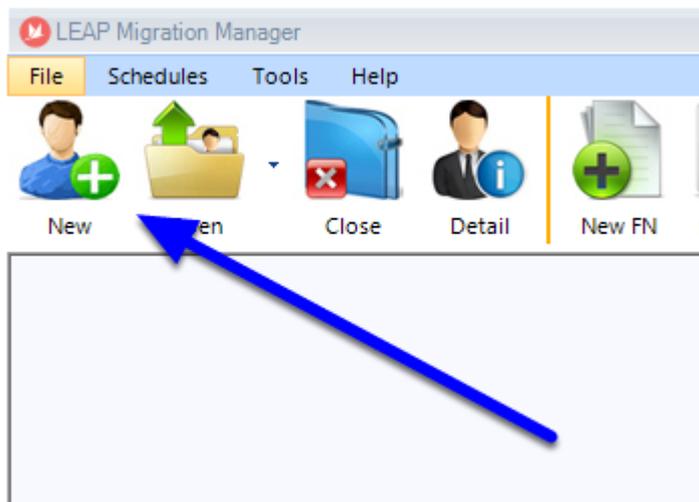
Create a New Prospect Matter

For each new matter you should create a Matter within Migration Manager so that you can record details about the potential/actual client. Prospect Matters are used in Migration Manager to record information about potential clients who have not formally retained the agent's services yet. Generally a Prospect Matter will be used for recording initial information from an enquirer or performing an initial assessment. A prospect Matter should not be used as an active Client Matter.

Video Demonstration

1. Click the New button

With your mouse click on the 'New' button in the top left hand corner of the screen which will open the 'New Matter' window.



2. Select New Prospect

On the lower left hand side of the 'New Matter' window choose 'New Prospect'.

Matter Type

New Client

Duplicate Selected Matter

New Prospect

Filter:

Matter Detail

Matter Type Migrant Business

Surname

Given Names

Preferred Name

Matter ID

Creation Date 25/02/2016

3. Insert the Prospects basic details

Matter Detail

Matter Type Migrant Sponsor

Business Family

Surname Fleming

Given Names Robert

Preferred Name Bob

Matter ID FLEMRO.16.0001

Creation Date 25/02/2016

Responsible Staff

RMA

Manager

Clerk

Office

4. Check the Matter ID

Depending on your preference settings, Migration Manager will propose a Matter ID for this matter. If you want to have a different Matter ID you can amend it at this stage.

Matter Detail

Matter Type Migrant Sponsor
 Business Family

Surname Fleming

Given Names Robert

Preferred Name Bob

Matter ID FLEMRO.16.0001

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5. Assign the responsible Staff Members

Choose who will be the responsible staff for this Matter. On the right hand side you can click the box which will bring up a window which will allow you to choose the RMA (Registered Migration Agent), Manager and Clerk for this matter.

Responsible Staff/Office

RMA Kelly Smith

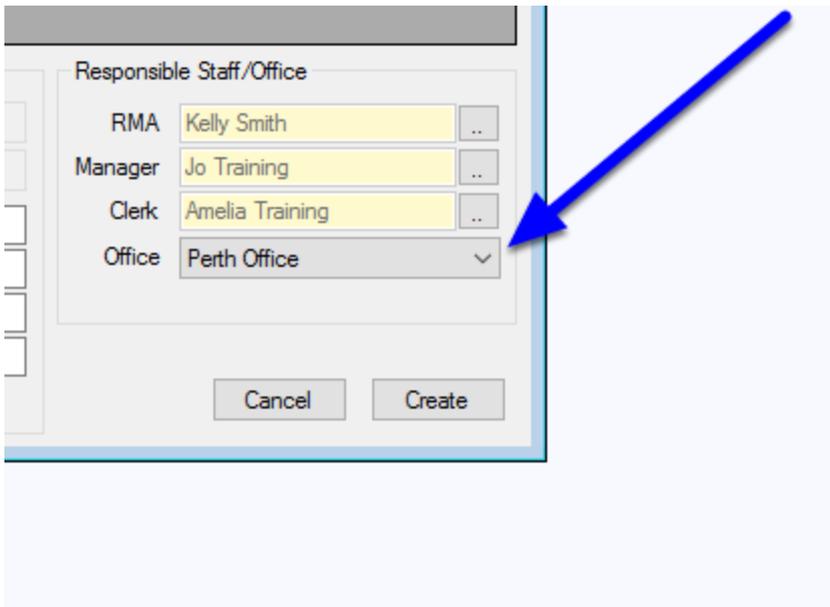
Manager Jo Training

Clerk Amelia Training

Office

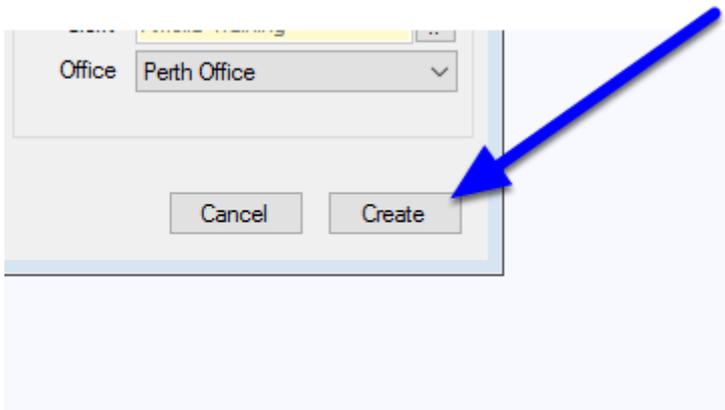
6. Assign an Office (if applicable)

If you have multiple Offices set up in the preferences, you can assign which Office will be responsible for this Matter.



7. Click Create

To create the Prospect Matter click the 'Create' button.



8. New Matter will Open

The new Matter will now open. You should proceed to now enter the information you have available.