Create a New Client Matter (Migrant)

For each new matter you should create a Matter within Migration Manager so that you can record details about the client. Client Matters are used in Migration Manager to record information about clients who have formally retained the agent's services.

Video Demonstration

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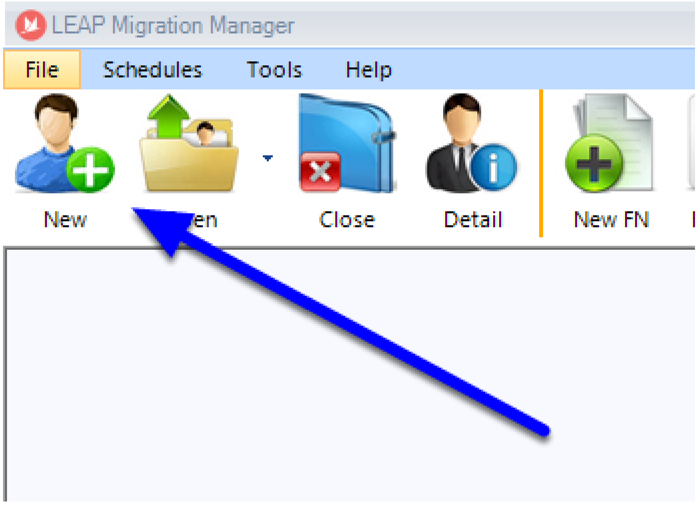
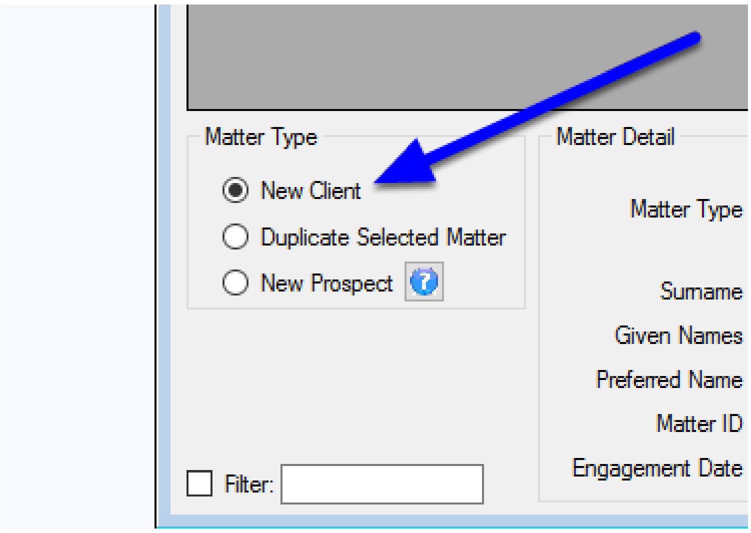
1. Click the New button

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

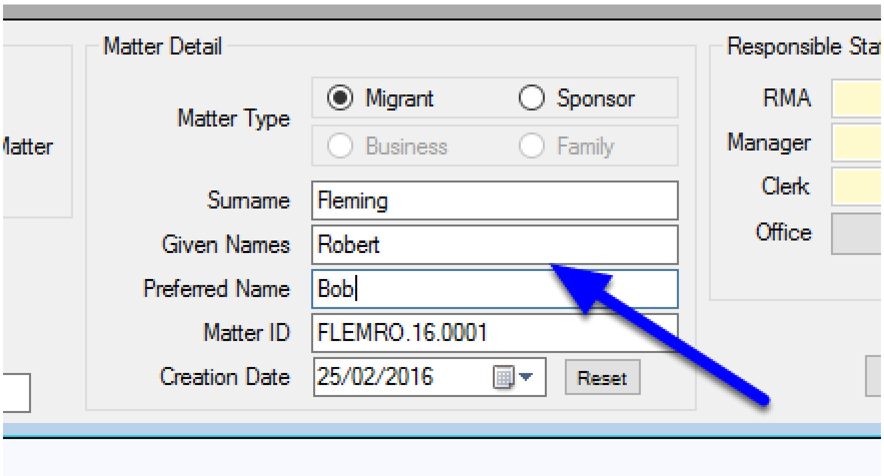


2. Select New Client

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

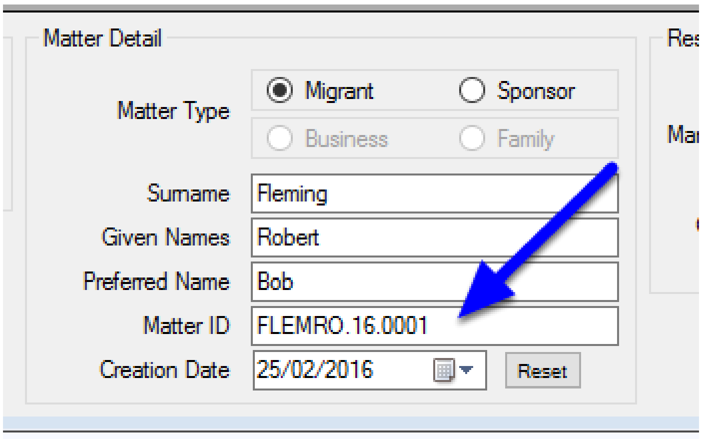


3. Insert the Client basic details



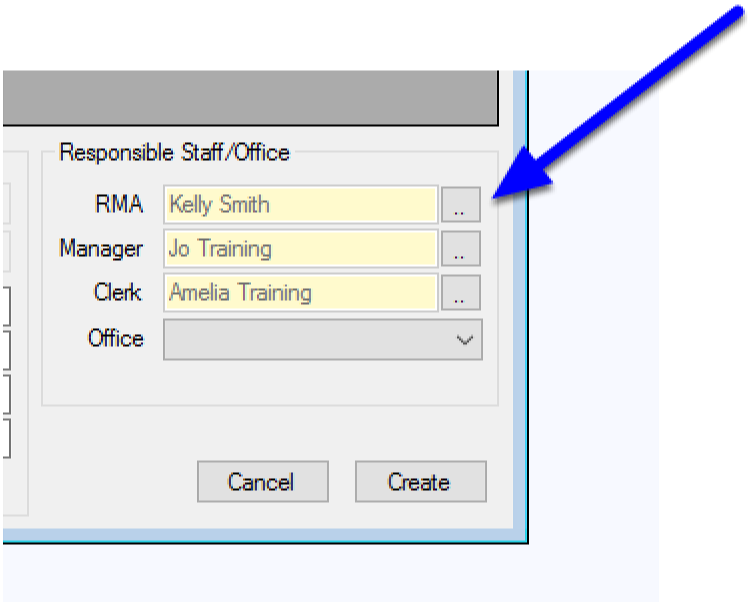
4. Check the Matter ID

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.



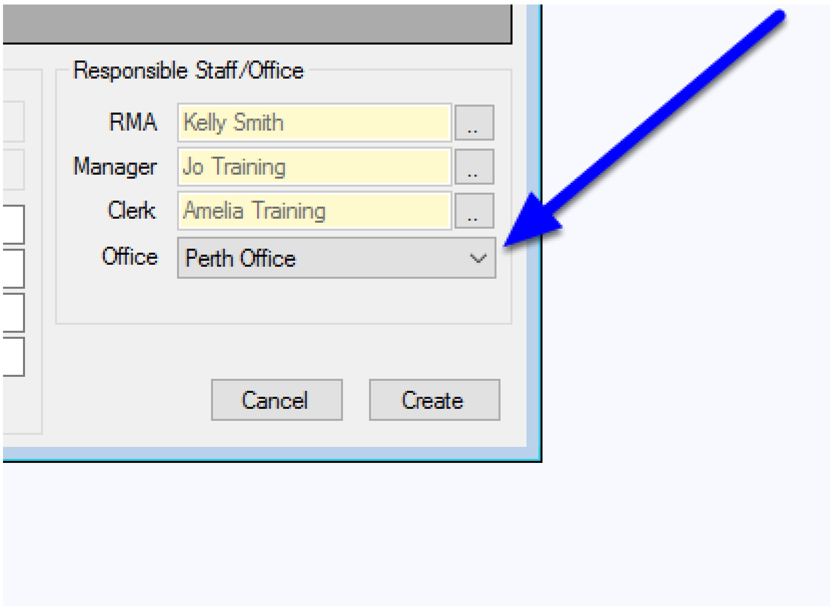
5. Assign the responsible Staff Members

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.



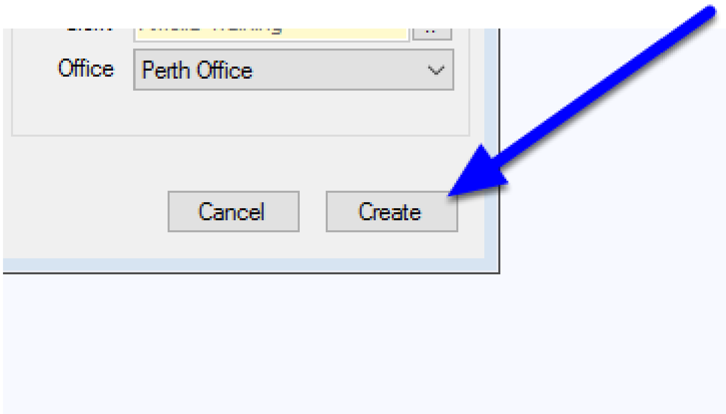
6. Assign an Office (if applicable)

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 Client 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.