

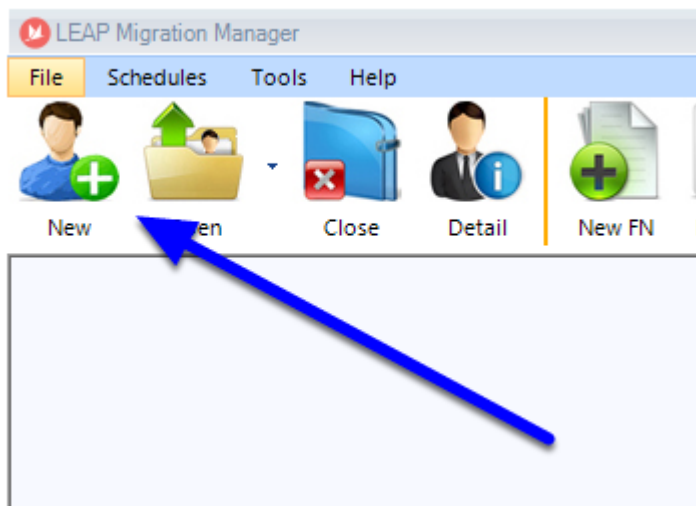
# Create a New Client Matter (Migrant)

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

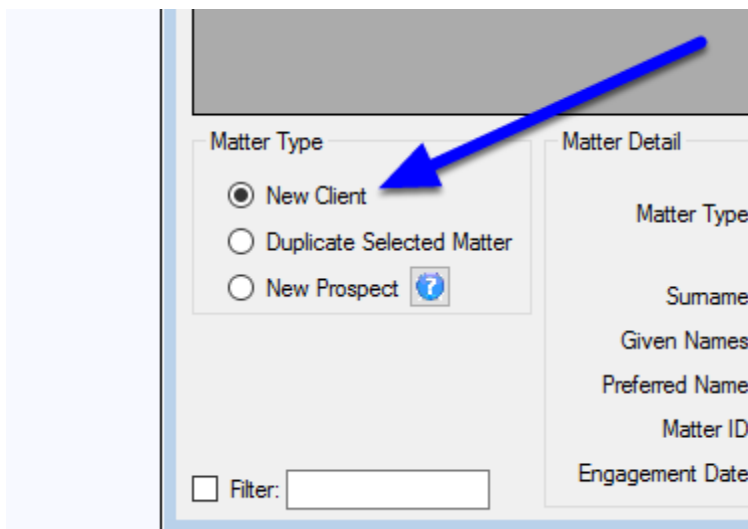
### 1. Click the New button

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

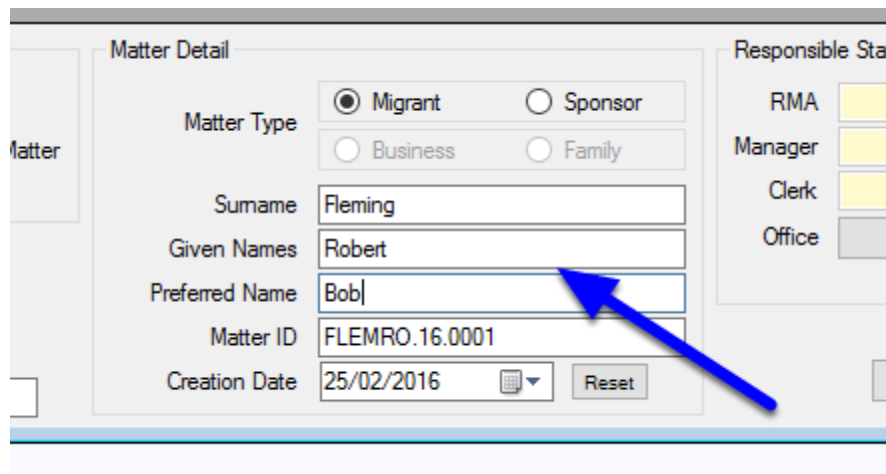


## 2. Select New Client

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



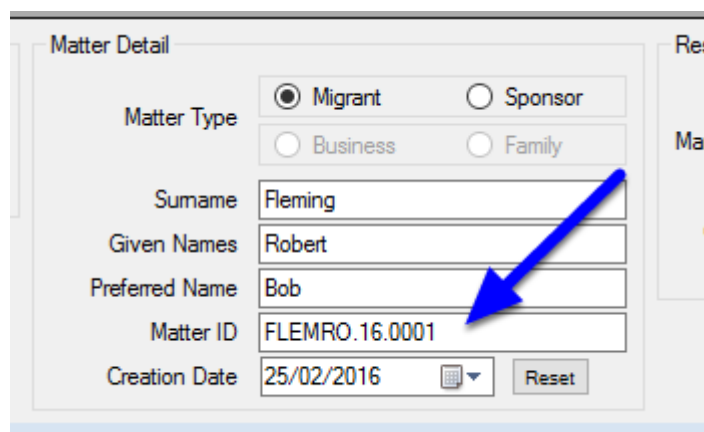
### 3. Insert the Client basic details



The screenshot shows the 'Matter Detail' form. On the left, there are input fields for 'Surname' (Fleming), 'Given Names' (Robert), 'Preferred Name' (Bob), 'Matter ID' (FLEMRO.16.0001), and 'Creation Date' (25/02/2016). Above these is the 'Matter Type' section with radio buttons for 'Migrant' (selected), 'Sponsor', 'Business', and 'Family'. On the right, there is a 'Responsible Staff' section with checkboxes for 'RMA', 'Manager', 'Clerk', and 'Office'. A blue arrow points to the 'Preferred Name' field.

### 4. Check the Matter ID

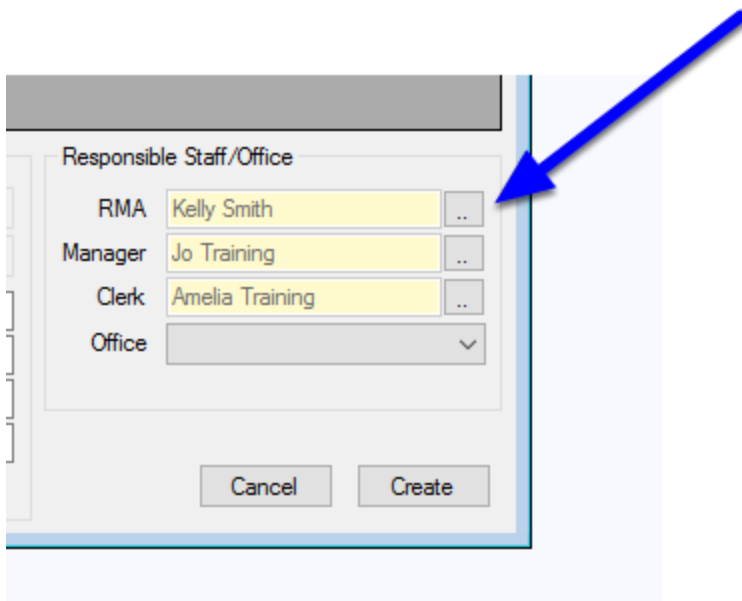
Depending on your preference settings, Migration Manager will propose a Matter ID for this matter. If you want to have a different Matter ID you can amend it at this stage.



This screenshot is similar to the previous one, but a blue arrow points to the 'Matter ID' field, which contains the text 'FLEMRO.16.0001'.

### 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.



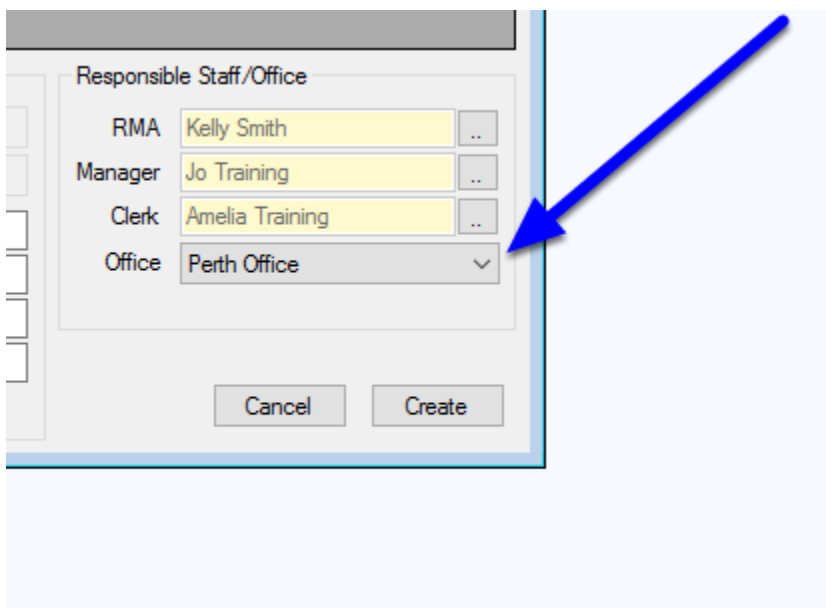
The screenshot shows a form titled 'Responsible Staff/Office'. It contains four rows: 'RMA' with 'Kelly Smith', 'Manager' with 'Jo Training', 'Clerk' with 'Amelia Training', and 'Office' with a dropdown arrow. Each row has a small '..' button to its right. At the bottom are 'Cancel' and 'Create' buttons. A blue arrow points to the 'Office' dropdown menu.

Responsible Staff/Office	
RMA	Kelly Smith ..
Manager	Jo Training ..
Clerk	Amelia Training ..
Office	▼

Cancel Create

## 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.



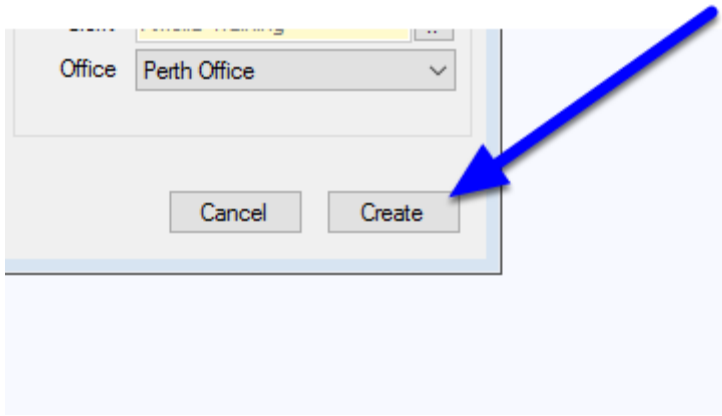
This screenshot is similar to the previous one, but the 'Office' dropdown menu now displays 'Perth Office'. The blue arrow still points to the dropdown menu.

Responsible Staff/Office	
RMA	Kelly Smith ..
Manager	Jo Training ..
Clerk	Amelia Training ..
Office	Perth Office ▼

Cancel Create

## 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.