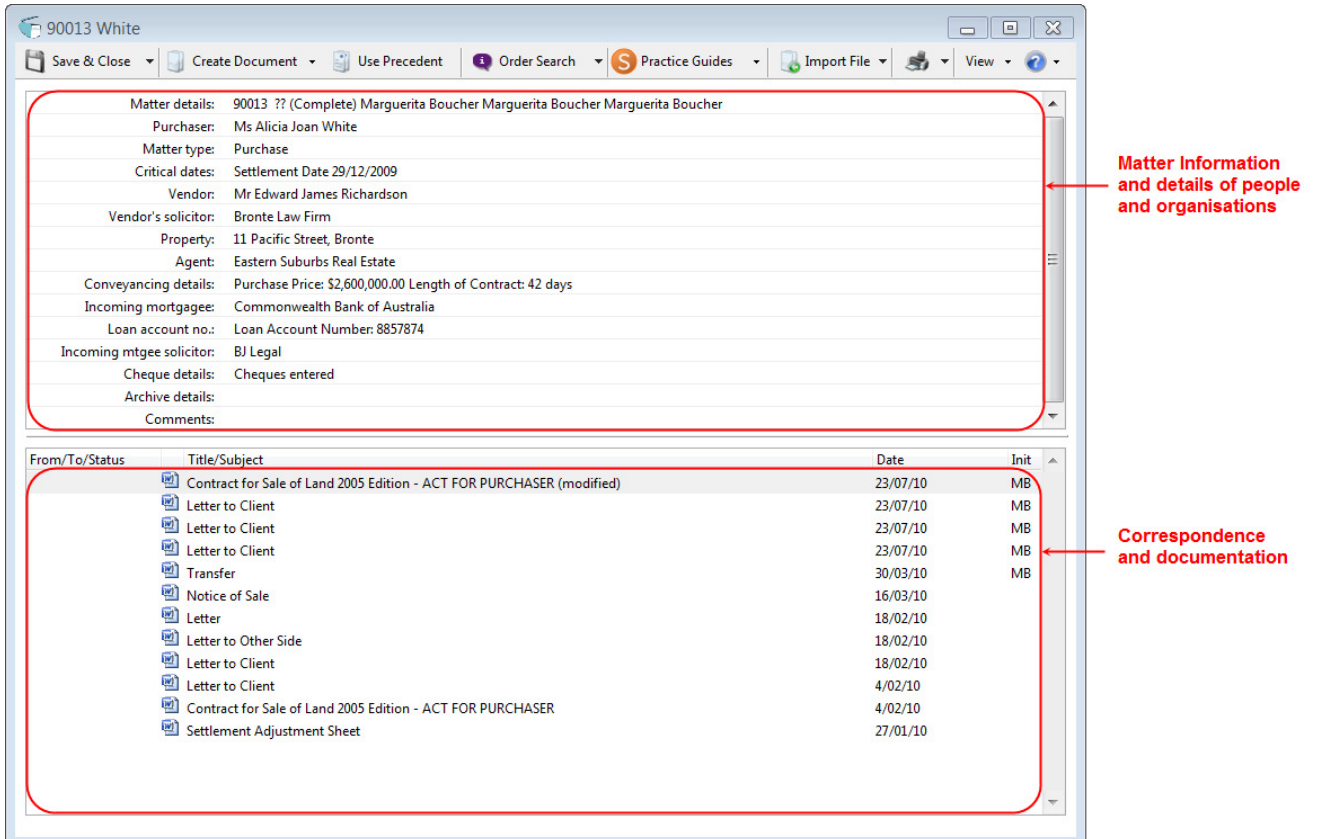


A matter in is an electronic version of your physical file. It is divided up into two main parts:

- The top section - for the matter information and the details of any associated people or organisations
- The bottom section - for the correspondence and all other documentation



The screenshot shows the '90013 White' matter details form. The top section, highlighted with a red box and labeled 'Matter Information and details of people and organisations', contains the following information:

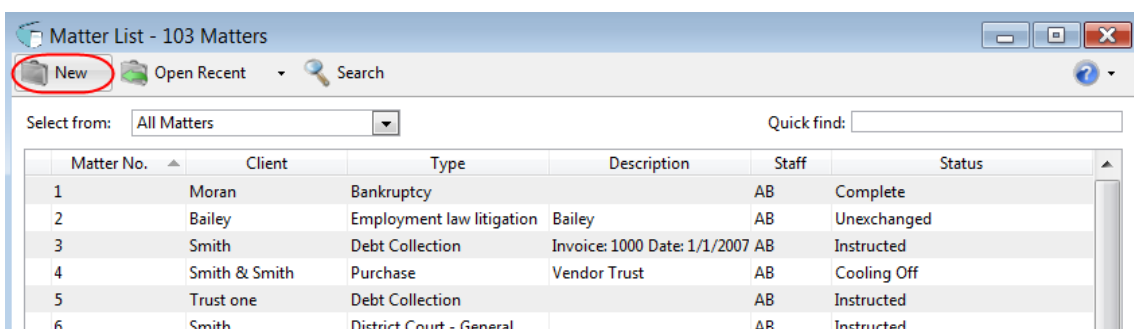
- Matter details: 90013 ?? (Complete) Marguerita Boucher Marguerita Boucher Marguerita Boucher
- Purchaser: Ms Alicia Joan White
- Matter type: Purchase
- Critical dates: Settlement Date 29/12/2009
- Vendor: Mr Edward James Richardson
- Vendor's solicitor: Bronte Law Firm
- Property: 11 Pacific Street, Bronte
- Agent: Eastern Suburbs Real Estate
- Conveyancing details: Purchase Price: \$2,600,000.00 Length of Contract: 42 days
- Incoming mortgagee: Commonwealth Bank of Australia
- Loan account no.: Loan Account Number: 8857874
- Incoming mtgee solicitor: BJ Legal
- Cheque details: Cheques entered
- Archive details:
- Comments:

The bottom section, highlighted with a red box and labeled 'Correspondence and documentation', is a table with the following data:

From/To/Status	Title/Subject	Date	Init
	Contract for Sale of Land 2005 Edition - ACT FOR PURCHASER (modified)	23/07/10	MB
	Letter to Client	23/07/10	MB
	Letter to Client	23/07/10	MB
	Letter to Client	23/07/10	MB
	Transfer	30/03/10	MB
	Notice of Sale	16/03/10	
	Letter	18/02/10	
	Letter to Other Side	18/02/10	
	Letter to Client	18/02/10	
	Letter to Client	4/02/10	
	Contract for Sale of Land 2005 Edition - ACT FOR PURCHASER	4/02/10	
	Settlement Adjustment Sheet	27/01/10	

**IMPORTANT:** This document sets out the mandatory areas that must be completed when creating new matters. It is important however, that ALL relevant information is entered accurately as it is later used when generating documents and precedents.

1. To create a new matter:
  - a. Click on the 'New' button at the top of the Matter List



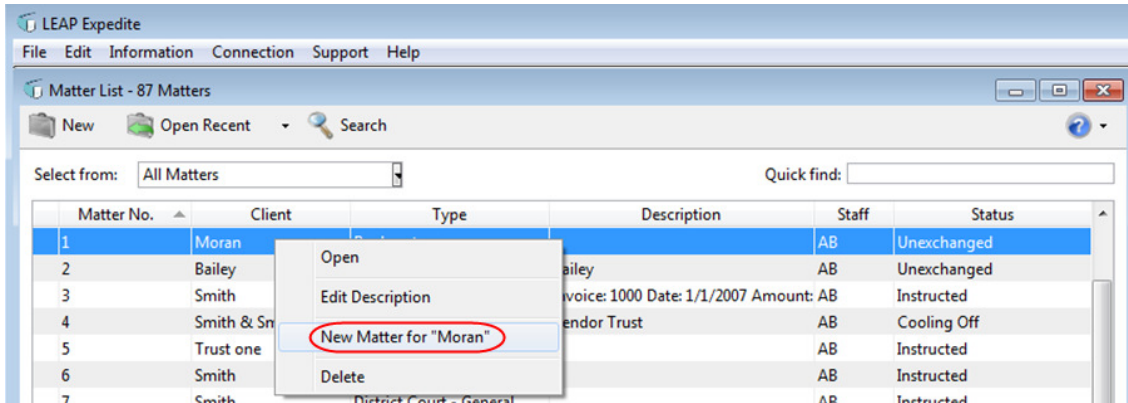
The screenshot shows the 'Matter List - 103 Matters' window. The 'New' button is circled in red. Below the button is a search bar and a table of matters.

Matter No.	Client	Type	Description	Staff	Status
1	Moran	Bankruptcy		AB	Complete
2	Bailey	Employment law litigation	Bailey	AB	Unexchanged
3	Smith	Debt Collection	Invoice: 1000 Date: 1/1/2007	AB	Instructed
4	Smith & Smith	Purchase	Vendor Trust	AB	Cooling Off
5	Trust one	Debt Collection		AB	Instructed
6	Smith	District Court - General		AB	Instructed

## HOW TO CREATE A NEW MATTER

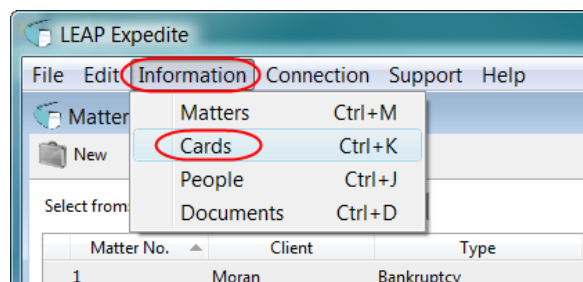
Or:

- b. If a matter has already been entered in LEAP Expedite for the client, you can navigate to the matter on the matter list, right click on it and select 'New matter for "..."'

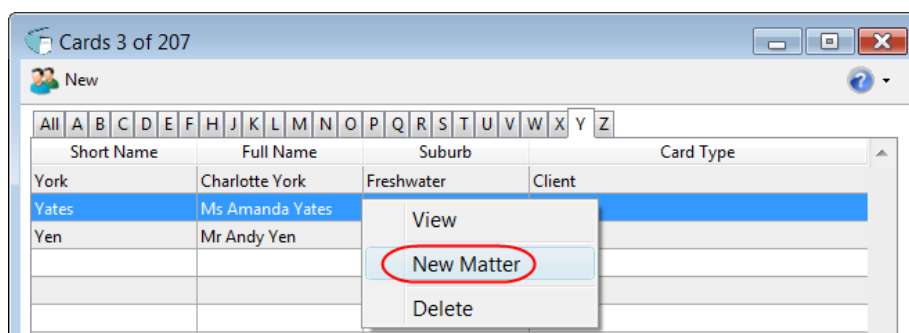


Or:

- c. If the client card has already been entered in LEAP Expedite, you can:
  - i. Click on the 'Information' menu and select 'Cards'



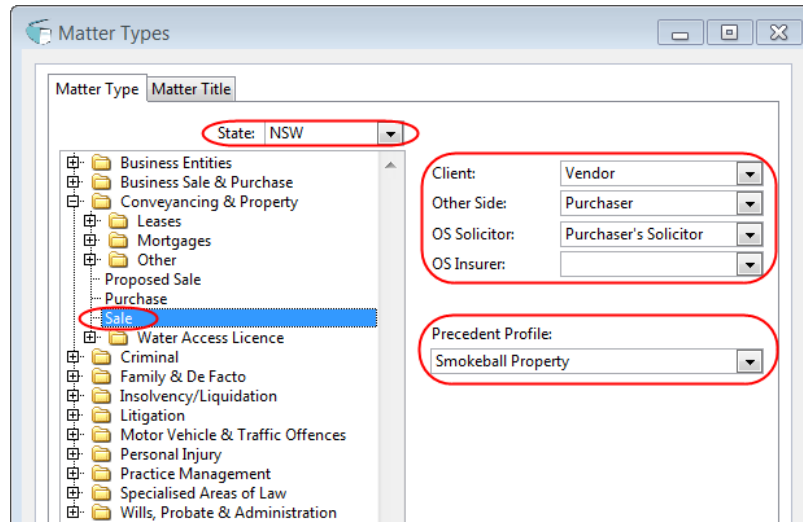
- ii. Navigate to the card, right click and select 'New Matter'



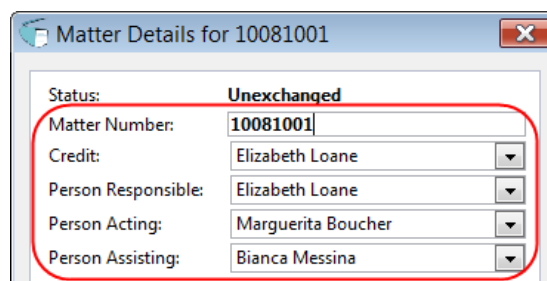
2. The 'Matter Type' window will appear. Select the relevant:
  - a. State
  - b. Matter category and type (click on the '+' signs to expand folders)

## HOW TO CREATE A NEW MATTER

- c. Client (and Other Side, OS Solicitor and OS Insurer if necessary for the matter type)
- d. Precedent profile (you will be directed to this area by default when using precedents)



- e. Click 'OK'
3. The 'Matter Details' window will appear
- a. Enter the 'Matter Number'
  - b. Select the relevant staff members for
    - i. Credit (eg. Partner)
    - ii. Person Responsible (eg. Partner)
    - iii. Person Acting (eg. Solicitor/Conveyancer)
    - iv. Person Assisting (eg. Secretary or Paralegal)
  - c. Enter any other relevant information in the areas provided
  - d. Click 'OK'



4. The 'Enter Client' window will appear. This window is in a Card format and this format will be used to enter information for all people and organisations.
- a. Select the 'Organisation' or 'Person' radio button (depending on your client)

## HOW TO CREATE A NEW MATTER

- b. Type the full name of your client (exactly how you would like it to appear in a Court document)
- c. Enter any other relevant information in the areas provided
- d. Click 'Save & Close'

Name	Phone	Email
Mrs Karen Bolton	(02) 9876 5236	karen.bolton@hotmail.com

Address/Phone Numbers | Details | People | Matters

Letter Title: Mrs K Bolton  Use Default  
Letter Dear: Mrs Bolton  Use Default  
 Use Friendly  Use

Street Address  P. O. Box  DX

Building Name: \_\_\_\_\_  
Unit/Level etc: \_\_\_\_\_ No.: 29 Street: Gordon Street  
Suburb: Port Macquarie State: NSW Postcode: 2444  
Country: \_\_\_\_\_

Email: karen.bolton@hotmail.com  
Web: \_\_\_\_\_  
Phone: (02) 9876 5236

For more information about cards, please view the documentation entitled 'How to use cards'.

### 5. Your Matter has been created!

You have now entered the minimum information required to save out of a matter. You can choose to enter the remaining legal details or return later after gathering more data.

Matter details: 10081001 Unexchanged Elizabeth Loane Marguerita Boucher Bianca Messina  
Vendor: Mrs Karen Bolton  
Matter type: Sale  
Critical dates: Instruction Date 10/08/2010  
Purchaser: \_\_\_\_\_  
Purchaser's solicitor: \_\_\_\_\_  
Property: \_\_\_\_\_  
Agent: \_\_\_\_\_  
Conveyancing details: \_\_\_\_\_  
Disch. mortgagee: \_\_\_\_\_  
Disch. details: \_\_\_\_\_  
Disch. mtgee's solicitor: \_\_\_\_\_  
Council: \_\_\_\_\_  
Settlement details: \_\_\_\_\_  
Sale reconciliation: \_\_\_\_\_

Click on the 'Save & Close' button to exit out of the matter.

Matter details: 10081001 Unexchanged Elizabeth Loane Marguerita Boucher Bianca Messina  
Vendor: Mrs Karen Bolton  
Matter type: Sale  
Critical dates: Instruction Date 10/08/2010