

MatterSphere V7.2

Update Client Details in a Document

When you are in a document and notice that there is some incorrect detail that has been brought through the automatic fields, you cannot simply manual amend in the document because:

1. When you go to save/print the document will update the fields automatically and bring the original data back through so it will still be incorrect
2. You need to update the information so that it will be correct when anyone else needs to use that Client.

See the example below

Attendance Note

Our Ref: GMC/SLB/C1-2

Our Client: Mr G Golclough

Date Created: 19 January 2018

Date of attendance: DATEOFATTENDANCE : Not Found

Attended Location: COURTNAM : Not Found

Document Reference: _____

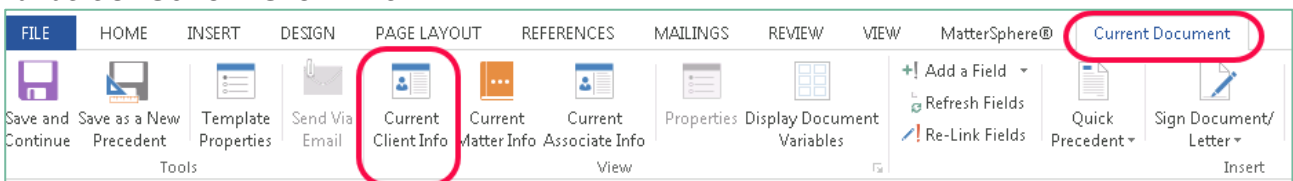
Description: _____ Units

Incorrect Client Name
Should be Mr Gary
Colclough

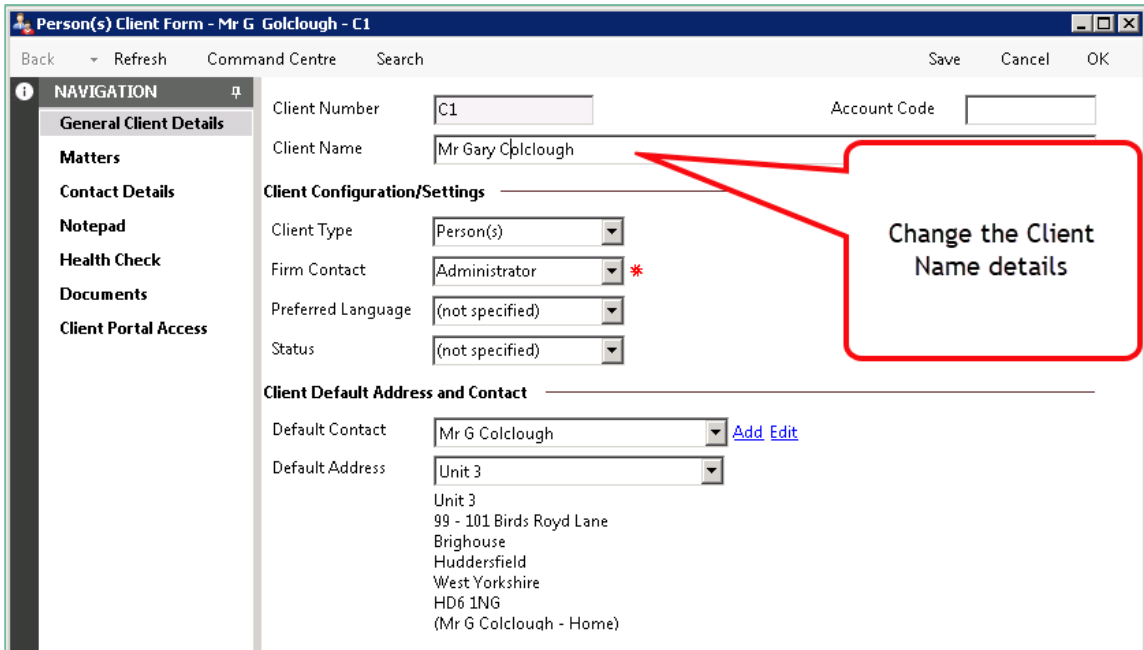
Update Client Information

☞ Click on **Current Document Tab**

☞ Select **Current Client Info**

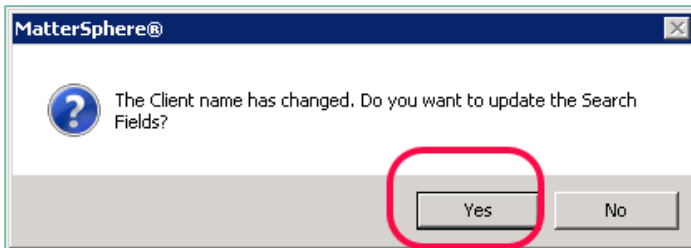


Change the necessary details on the Client Details screen



☞ Click **Save** to save the changes

You will see an information box appear please click on yes this will update the search fields to ensure this information will appear on a search made.

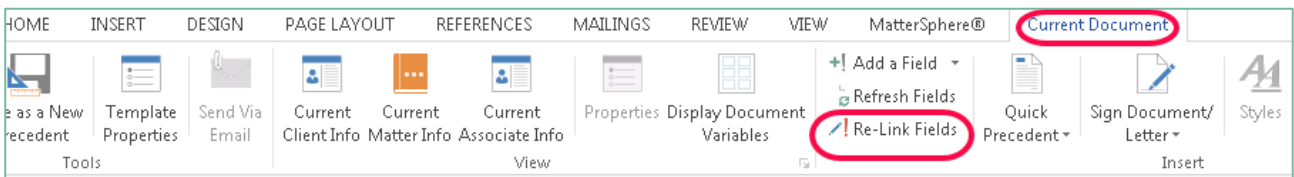


Updating Letter/Document

When you return to the document you will need to re-link the fields to bring the new Client details through

☞ Click on **Current Document Tab**

☞ Select the **Re-Link Fields** icon



All information is now updated in this document and for future in this Client record.