



CIVICA

Private Practice Training → Client / Matter Database Setup

➤ Who will the course benefit?

Any Supervisors, Fee Earners, who will be using and maintaining the database.

➤ Pre-requisites

Attendees should have basic keyboard skills.

➤ Course reference

8LEG001

➤ Duration

One day.

➤ Further information

For additional information on this course or any other training issue please e-mail training@civica.co.uk

➤ Course objectives

The session will cover how to define the dataset reference data, navigating the client windows, editing and deleting clients using the Galaxy database. It also explores adding client notes, creating client associations, adding group and member relationships, Delegates will be shown how to navigate the matter windows, adding, editing and deleting matters using the Galaxy database.

Database

- Maintain associate types
- Maintain client attributes
- Maintain client classifications
- User defined answer list
- Client information questions
- Maintain market sectors
- Maintain priorities
- Maintaining prospect details
- Switching name roles
- Conflict searching
- Maintaining client details

Time Valuation Methods

- Client/matter rates
- Activity valuation
- Fixed fees
- Scaling fees
- Work type valuation

Accounts – Matters

- Maintain matter associate types
- Matter information questions
- Maintain key date descriptions
- Maintaining matter details
- Matter options window
- Matter information

Reports

- Matters opened report
- Client/matter labels