

Open a matter

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A matter is one piece of work for a client, such as a purchase or a lease renewal. It sits in a work stream and moves through that stream's stages until it's done.

Before you start

You need the client in Desk and at least one work stream. If **Work stream** has nothing to choose, an admin can add one under **Settings**, then **Work streams**.

1 Start a new matter

On the client's page, press **New matter**. You can also press **New matter** on **Home** or on **Queues**, and then choose the client from the list.

2 Choose the work stream

Pick the **Work stream** the matter belongs to. If you only have one, it's already chosen for you.

3 Give it a title

Enter a **Title** that says what it is, like "Lease renewal, Harper & Lowe". **Type** and **Reference in your other system** are optional.

4 Open it

Press **Open matter**. If we already act for someone with a similar name or company number, you'll see **Have a look before you open it** with who they are, and you can check them before pressing **Open it anyway**.

5 Keep it moving

On the matter's page, use **Stage** to move it on, add people under **On this matter**, and set key dates under **Dates**. Tick items off the **Checklist** as you go, and use **Change owner** to hand it to someone else.

When a second person needs to sign off

Some stages need a second person to agree before the matter moves on. The matter then shows **Waiting for a second person to sign off**, and anyone other than the matter's owner can press **Sign off**, or add a note and press **Send back**.

Your organisation may use its own words for clients, matters and owners, and the page follows them.

If something goes wrong

The matter won't move to the next stage.

The stage may need its checklist finished first, or be waiting for a second person to sign off. Finish the checklist or ask a colleague to sign it off, then try **Stage** again.