

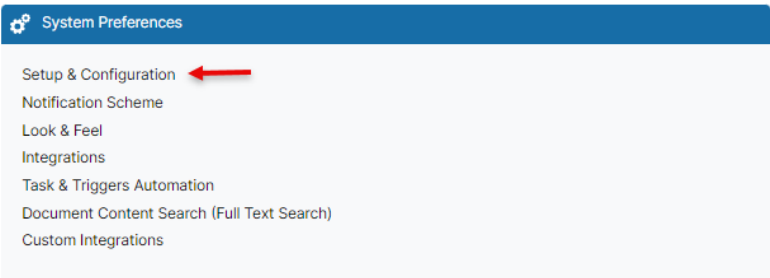
How to Set Default Matter Client

Objectives

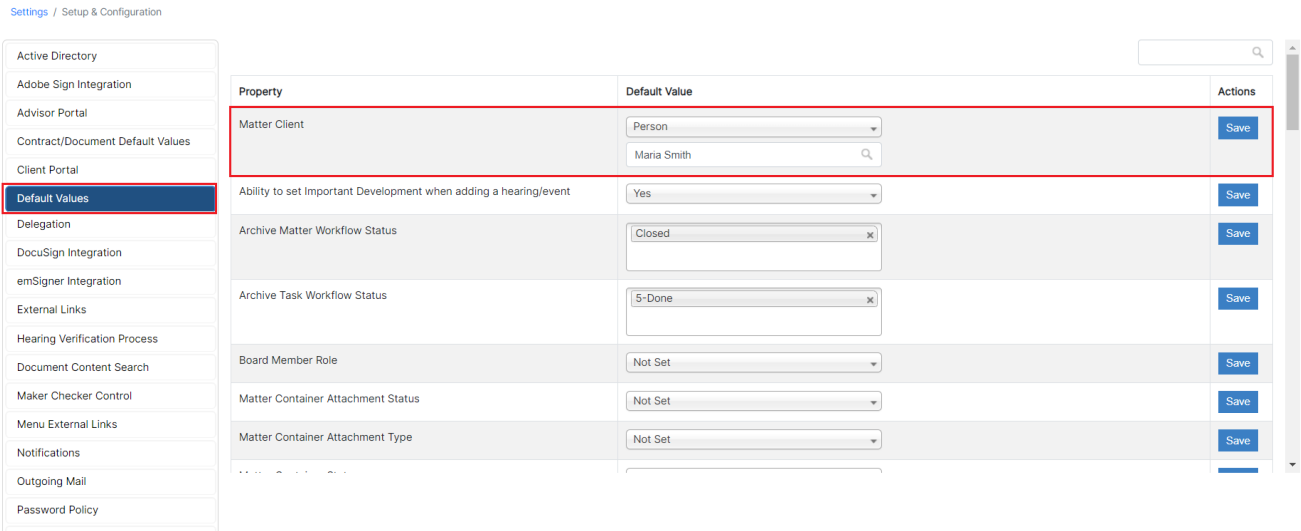
- Specify your default matter client name.

Steps

You can predefine your default client to be used automatically in matters. This can be done from the **System Settings System Preferences Setup & Configuration**



Then navigate to the **Default Values**, where you can specify the **Matter Client**. Select the contact type either person or company, and the client name as well, and save your changes.



This will automatically insert the client name when a new matter is created.

Add Corporate Matter

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General Info

More Details

[Date & Time](#)
[People](#)
[More Details](#)
[Custom Fields](#)
[Matter rate](#)
[Billing Preferences](#)

General Info

Name:*

Practice Area:*

[+ Practice Area](#)

Arrival Date:*



Client Name:

Maria Smith



Description:

Internal Ref Number:

Matter Priority:

For more information about LEXZUR, kindly reach out to us at help@lexzur.com.

Thank you!