

Matter Deadlines Table

The Matter Deadlines table is used to manage filing and deadlines related to a Matter record. An unlimited number of Matter Deadline records can be created and assigned to different people. Reminder notifications can be sent out to the person responsible for the record, and reports can also be created to notify relevant users in advance of upcoming deadlines.

The main fields of the Matter Deadline record are:

Type of Deadline: a choice field to define the nature of the deadline.

Status: contains values of Pending, Completed, Past, and Canceled. When the deadline date passes, a time based rule sets the status to Past.

Responsible Person: this is set by default to the Matter Owner, but may be modified.

Deadline Name: holds a brief description of the deadline. This is the summary field for the table.

Deadline Date: holds the actual date of the deadline.

Reminder Date: holds the date that a reminder email gets sent to notify the relevant users about the deadline.





Automation and Notifications

There are two time based rules in this table that are disabled by default.

- **Notify Responsible Person of upcoming deadline:** This rule runs daily. It email the responsible person on the reminder date.
- **Set Status to Past on the deadline date:** This rule runs daily. It sets the status to Past and emails the responsible person and the matter owner of the past deadline.

Reports

There are two reports that can run manually.

<input type="checkbox"/> Edit View	Title ↑	Filter	Published	Date Updated	Output Format	Type of Report
<input type="checkbox"/>  	All Pending or Past Deadlines	Status is Pending or Past (C)	No	Mar 01 2021 12:19	HTML	Standard
<input type="checkbox"/>  	My Upcoming Deadlines	Status is Pending and I am responsible person (C)	No		HTML	Standard

