



Matter Files Table

The Matter Files table holds a record for file that are related to Matter records. You can upload and link an unlimited number of files to Matter records. These files are OCR'd as needed for effective searching. Other than the OCR action, there are no rules or automation running on this table.

The Matter File record has one main tab besides History: the File Details tab. Matter File records have Description fields, and inherit the access permissions from the linked Matter record. If the linked Matter record is confidential, or has called out specific people who can view it, the same people are able to access the files linked to the Matter record.


Save Cancel 


Matter File

File DetailsHistory<<>>

Collapse All

File Details

ID1StatusActive 


File TypeEngagement letter 

File DescriptionEngagement letter for Skjerven, Morrill

Attached FileAttach/Manage1. 2021-02-08_9-45-38.png

OCR FileAttach/ManageDrag&Drop files


Matter Details

Matter NumberT-2307234 


Matter Owner

Matter TypeTrademark Application

Matter StatusNew

Matter TitleTrademark for Agiloft 

Matter Visible to These UsersEWSsystem,Christopher Lee - example40@gmail.com

Matter is Confidential No

The drop-down list in the File Type field is managed by the Matter File Types table, and includes the following values by default:

▼ File Details

ID

File Type

▼ Matter Details

Advice of Counsel

Deposition

✓ Engagement letter

General Matter File

HR Complaint

Inbound Communication

Invoice

Legal Memo

Litigation Filing

Outbound Communication

Patent Application

Privileged Material

Trademark Application

Matter Files are created when attachments are added to Matter records. You can also create Matter Files directly from the Matter Files table.

Files have a default Status of Active. When files are uploaded to a Matter record, the user can select an existing file to supersede, and that changes the status of the previous file to Superseded. There is also a status called Archived that is used for old or deprecated Matter File records that should be excluded from searching. There is no automation out-of-the-box to set files to Archived, but that can be easily added.