

Matter Types Table

The Matter Types table holds records that populate values in the drop-down lists for the Matter Type field in the Matters table or Request Type field in the Legal Requests table. A Matter Type can be used in a Legal Request, a Matter, or both.

A Matter Type record includes a few basic fields, in addition to the Matter Type.

ID	19	Status	Active ▾
*Matter / Request Type	Corporate Transaction / Merger or Acquisition		
Always Confidential ?	<input checked="" type="radio"/> Yes <input type="radio"/> No	Used In	<input checked="" type="checkbox"/> Legal Request <input type="checkbox"/> Matter
*Default Assigned Team	Legal Management Team ▾		
Related Matter Type	Confidential HR Matter ▾		
Show Fields in Legal Request/Matter	Multiple contract linked set 🔍		
Instructions ?	<div>This is confidential and only available to HR and the assignee.</div>		
<div>Edit</div>			

Status: values are Active or Inactive, which determine whether the Matter Type is visible in other tables.

Always Confidential: defines visibility access for Legal requests or Matters.

Used in: the list in Legal Requests or Matters is filtered by a match on this field.

Default Assigned Team: defines automatic team assignment for a new Matter or Legal Request of this type.

Related Matter Type: visible only for Legal Request Types, this defines the related Matter Type that should be used as a filter when searching for an existing matter to link into the request. For instance, if the Legal Request Type is Issue about an existing Patent, the related Matter Type would be Patent Application and when the user looks up the matter to select it, it is filtered to only matters of that type.

Show Fields in Legal Request/Matter: multi-choice list of specific fields that are optionally visible in the Legal Request or Matter record.

Instructions: used to provide HTML formatted instructions to the user submitting a Legal Request of this type.

Use Case

Matter Types are managed by admin users or members of the Legal Group, and new Matter Types can be added easily as needed by selecting New in the Matter Types table. They may also be deactivated by changing their status to Inactive.