



Collaborating with SimpleLegal Clients on General and Matter Files

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What's new?

Starting 4/19/2024, SimpleLegal clients will be able to assign new roles to outside counsel in order to enable file sharing and collaboration.

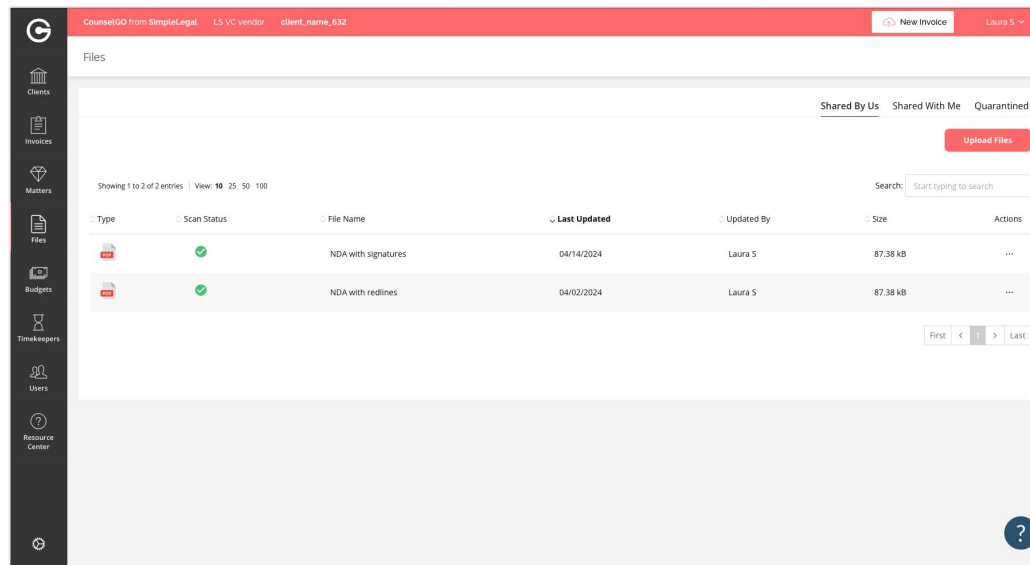
Using this capability is at the sole discretion of the client, meaning law firms and vendors will not be able to utilize this new functionality without your client initiating it.

Introduction

SimpleLegal's bi-directional collaboration feature enables SimpleLegal clients to share and collaborate on legal documents with their outside counsel – from SimpleLegal to CounselGO and vice versa.

You can share two categories of documents:

- **General files:** Documents like billing guidelines, legal service agreements, engagement letters, etc.
- **Matter files:** Documents like patent applications, visa applications, M&A agreements, employment contracts, etc.



General files

If a client shared a general file with you, you will see a new navigation bar item labeled “Files.”

Within this new section, click on the tab “Shared With Me” to access and view the file.

CounselGO from SimpleLegal LS VC vendor client_name_632 New Invoice David Chai

Files

Shared By Us **Shared With Me** Quarantined

Showing 1 to 4 of 4 entries View: 10 25 50 100 Search: Start typing to search

Type	File Name	Last Updated	Updated By	Size	Actions
PDF	Billing guidelines	04/10/2024	Laurel Smith	87.38 kB	...
PDF	Engagement letter	04/09/2024	Laurel Smith	87.79 kB	...
PDF	Contacts list	03/06/2024	Laurel Smith	19.07 kB	...
PDF	Framework agreement	03/06/2024	Laurel Smith	314.59 kB	...

First < 1 > Last

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Matter files

If a client shared a matter file with you, navigate to the specific matter and click on the new tab labeled “Files” to access and view the file.

The screenshot displays the SimpleLegal CounselGO interface. The top navigation bar is red and contains the text "CounselGO from SimpleLegal", "LS VC vendor", "client_name_632", a "New Invoice" button, and a user profile "David Chai". Below this, a breadcrumb trail shows "<< Return to Matters" and "Bradbury estate". The main interface has a dark sidebar on the left with icons for Clients, Invoices, Matters (highlighted with a blue box), Files, Budgets, Timekeepers, Users, and Resource Center. The main content area has three tabs: "Attributes", "Invoices", and "Files" (highlighted with a blue box). The "Files" tab is active, showing a list of files. The list has columns for Type, File Name, Version, Last Updated, Updated By, Size, and Actions. There are two files listed: "2023 Annual Compliance and Emergency Preparedness Updates-Core and Clinical-CA Only" (PDF, 2.84 MB) and "List Attribute List (32)" (XLS, 5.51 kB). A search bar and pagination controls are also visible.

CounselGO from SimpleLegal LS VC vendor client_name_632 New Invoice David Chai

<< Return to Matters
Bradbury estate

Attributes Invoices **Files**

Shared By Us Shared With Me Quarantined

Showing 1 to 2 of 2 entries View: 10 25 50 100 Search: Start typing to search

Type	File Name	Version	Last Updated	Updated By	Size	Actions
PDF	2023 Annual Compliance and Emergency Preparedness Updates-Core and Clinical-CA Only	v1	03/27/2024	CSM User	2.84 MB	...
XLS	List Attribute List (32)	v1	03/22/2024	CSM User	5.51 kB	...

First < 1 > Last

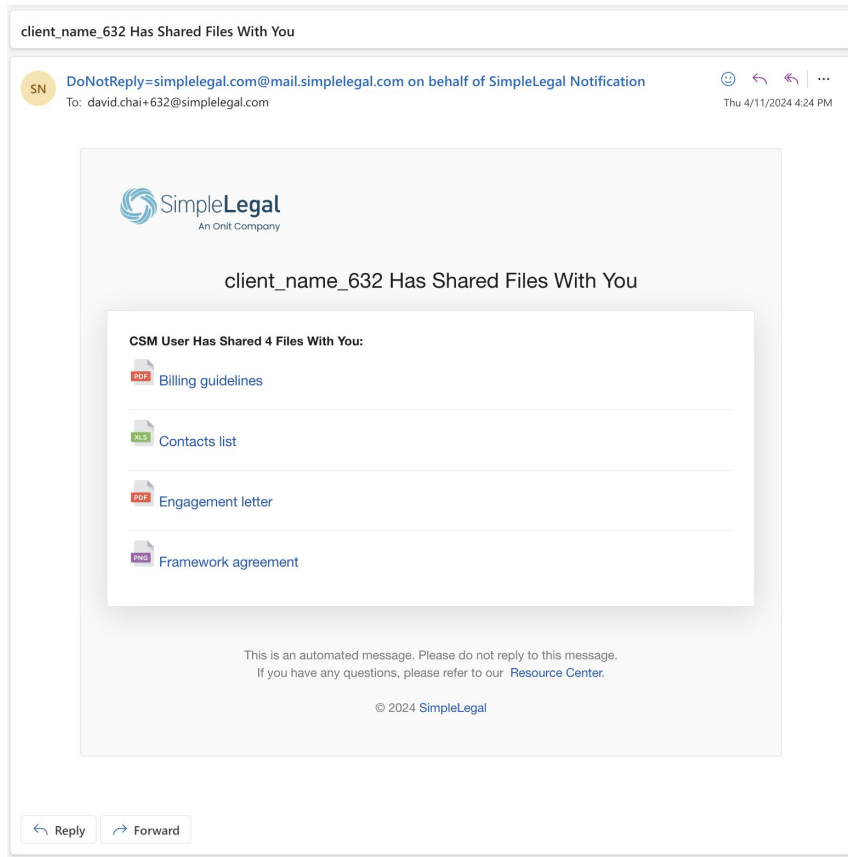
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Email notification

When general and matter files have been shared with you, an email notification will be sent to your email address.

Each file is hyperlinked and clicking on them will take you straight to the document in CounselGO.

Note: Your SimpleLegal client(s) are able to turn these email notifications on/off.

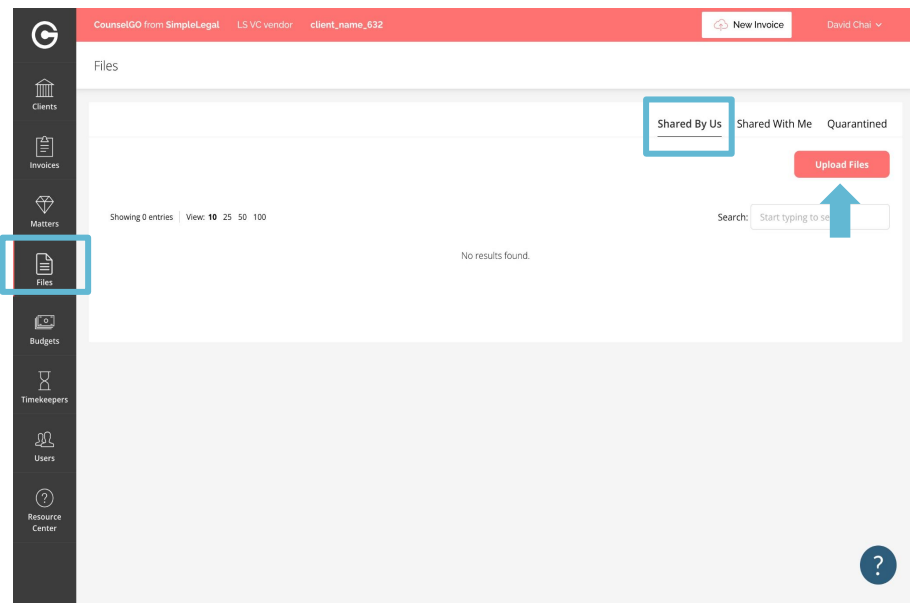


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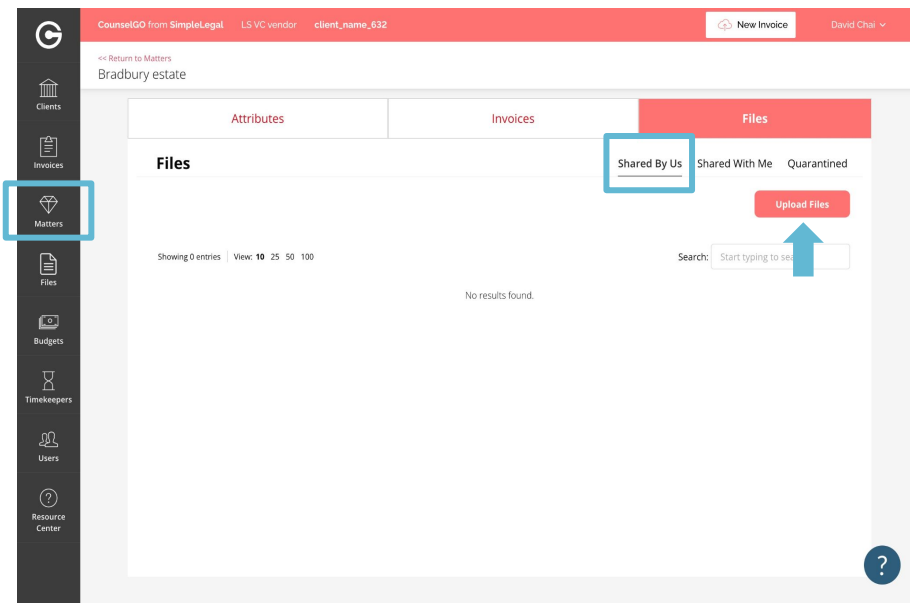
Sharing files with SimpleLegal clients

To share files with your SimpleLegal clients, simply navigate to the locations below and upload the files you want to share:

General files



Matter files



Need help?

If you have questions or need assistance, please contact our dedicated support team:

help@counselgo.com

Thank you!

