

Vendor collaboration - Customer FAQ

1. What happens if a contact that had file sharing permissions leaves the firm I'm working with, will they still be able to see files I've shared?

You can either delete the contact from the Assigned Contacts table on the vendor details page or ask a CounselGO admin to "inactivate" the user from their side on CounselGO. Either one of these actions results in the user no longer being able to log into CounselGO.

If you still need to work with the contact but simply don't want them to see shared files any longer, you or your CounselGO admin can remove the role for General/Matter File Sharing, which will remove the contact's access to any files shared.

2. Can we control who gets notified when outside counsel shares files with us?

Yes, notifications can be controlled for both general file sharing and matter file sharing. You can choose who gets notifications for general files on the vendor details page (the vendor manager is automatically added here to receive notifications):

File Sharing Notifications
Choose who receives notifications when this vendor shares files or updates a file that's been shared. A minimum of 1 user must be listed.

Add user

Showing 1 to 2 of 2 entries | View: 10 25 50 100

Search:

Name	Role	Email Address	Added On	Actions
Abigail Adams	Admin	email-6908	04/12/2024	...
Laurel Smith	Admin	laura.sneddon+admin2@simplelegal.com	04/02/2024	...

First < 1 > Last

Matter file sharing notifications are controlled from the Settings tab of the matter details page(the matter lead is automatically added here to receive notifications):

VC4 OPEN

Actions

Overview Budgets Files Invoices Tasks Events Related Matters Updates Vendors **Settings**

Allocations
Reviewers
Invoice Notes
Permissions
Notifications

Manage Notifications **Court Rules** **File Sharing**

Add user

Choose who receives notifications when an assigned vendor shares files or updates a file that's been shared. A minimum of 1 user must be listed.

Showing 1 to 3 of 3 entries | View: 10 25 50 100

Search:

Name	Role	Email Address	Added On	Actions
Abigail Adams	Admin	email-6908	04/25/2024	...
Donna Farrel	Admin	dan.foster@onit.com	04/25/2024	...
Laurel Smith	Admin	laura.sneddon+admin2@simplelegal.com	04/25/2024	...

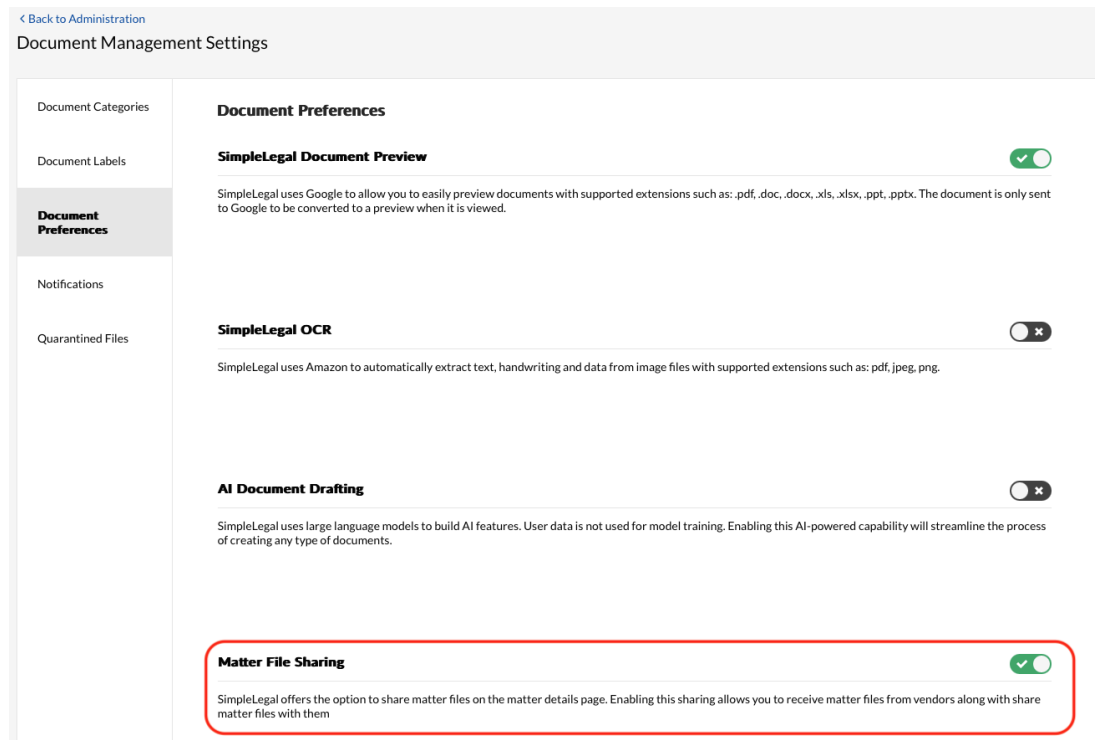
First < 1 > Last

3. Is there a max file size that can be shared?

Files up to 1 GB in size can be uploaded.

4. If we do not want file or matter sharing enabled, how do we turn it off? How about on the vendor side?

Matter file sharing can be disabled by an admin going to the Document Settings page under the Administration. Once there, they can go to the Document Preferences tab and choose to set the Matter File Sharing toggle to off.



General file sharing cannot be toggled off. If you do not want to use this functionality, we suggest letting your CounselGO admins know not to enable that role for your CounselGO contacts on their end.

5. Do I need to send my Outside Counsel Guidelines file(s) to each of my vendors, or am I able to share those documents once to all vendors?

Though not available right now, in the near future we will have a bulk file share option to share the same file across all your vendors.

If you have any further questions, please feel free to reach out directly to your CSM or email success@simplelegal.com.