



Collaborating with SimpleLegal Clients - Matter updates

What's new?

Starting 8/23/2024, SimpleLegal clients will be able to provide real-time, matter updates to outside counsel for streamlined collaboration. Using this capability is at the sole discretion of the client, meaning if your client wants to communicate with you on a matter, you may see a new Updates tab where you can share updates on how things are progressing.

Overview

SimpleLegal's bi-directional collaboration feature enables SimpleLegal clients to share real-time matter updates – from SimpleLegal to CounselGO and vice versa. If you're given access by your client, you'll see an Updates tab within your selected matter. This is where you can add updates and communicate to your client, all within the platform.

The screenshot shows the 'Updates' tab within a matter view for 'AntiTrust matter'. The interface includes a sidebar with navigation icons for Clients, Invoices, Matters, Files, Budgets, Timekeepers, Users, and Resource Center. The main content area has tabs for Attributes, Budgets, Invoices, Files, and Updates (which is active). Below the tabs, there's a search bar and a list of updates. Two updates are visible: one from 'Laurel Smith - client_name_632' dated July 9, 2024, and another from 'Laura S' dated July 2, 2024. Each update includes a user icon, name, date, and the text of the update. At the bottom, there's a rich text editor with a toolbar and a 'Submit' button.

Here's what you'll find:

- A rich text editor to effectively convey your message.
- Convenient filters to find specific updates by date, user, or keyword
- Notifications every time your client posts, so you don't miss an update.

Need help?

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

help@counselgo.com