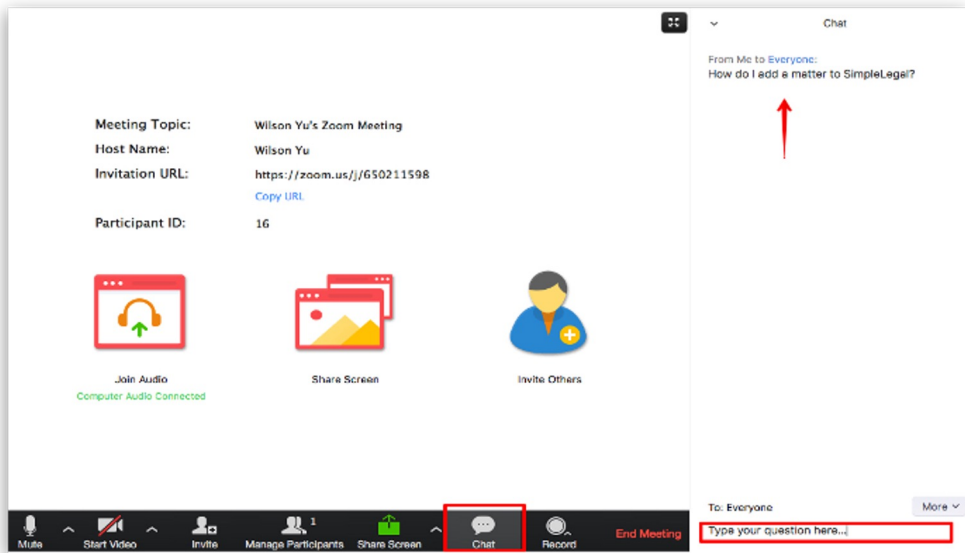




Matter Management: Legal Requests and Matter Templates

A Few Housekeeping Items

- All Attendees are muted
- Please ask questions using the Chat
- If we do not get to your question during the session, we will follow up with you afterwards
- Webinar slides and recording will be sent after the webinar



Hi, I'm Kinda! 🙌

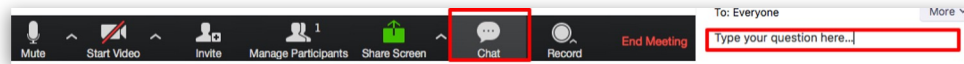
- Customer Education Manager
- Based in Houston, TX



Question

Where are you joining us from?

Share your response in the chat



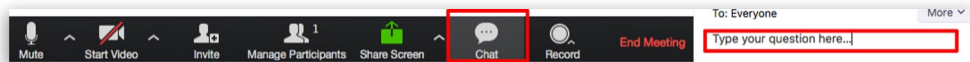
By the end of this training, you'll be able to:

- **Organize and track** different kinds of matters in SimpleLegal
- **Understand** the different options for matter intake in SimpleLegal
- **Create** and **edit** matter templates, legal request forms and custom attributes

Learning Goals

Question

How are you currently organizing and tracking different types of matters?



<< Return to Matters

Dwight Schrute Termination OPEN Actions

Overview Budgets Files Invoices Related Matters Updates Vendors Settings

Attributes

General

Matter Name	Dwight Schrute Termination
Matter Description	Dwight Schrute is being terminated for suspected embezzlement of company funds.
Client Matter ID	saturn-472
Practice Area	Employment
Accruals Enabled	Inherit from Practice Area

Employment Information

Other Attributes

Case Information

Summary of Dispute (Cause of Action)	Dwight Schrute is being terminated for suspected embezzlement of company funds.
Case Summary for Audit Letter	Dwight directed funds intended for purchase of inventory to his personal account. It was discovered during an internal store audit. He is claiming that he was framed and is suing for wrongful termination.
Key Issues	Wrongful termination; proof of embezzlement.
Adverse Firm(s) and Attorney(s)	Avery Tolar at Bendini, Lambert & Locke
Trial Date	10/10/2022
Reinstate	

- You want to **track** different types of matters differently
 - You track different data elements for different matter types
 - You may have a matter type (e.g. Patents) that is different than the others (e.g. Litigation)
 - You have an integration to create matters
- **Templates** are the primary means of organizing matters
- **Attributes** are the unique data elements you want to track within the templates

Matter Intake

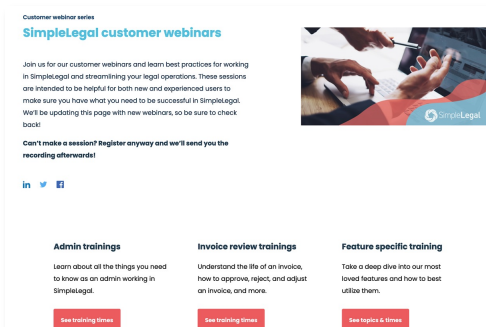
- **Creating matters in SimpleLegal**
 - You create matters for internal or external work by the legal department
 - You assign matters to people or teams
 - You might distribute who can create or request a matter
- **Matter Creation Options**
 1. Directly create a matter
 2. Request a matter (Legal Requests)
 3. Third-Party Integration (not covered in this training)

Demo

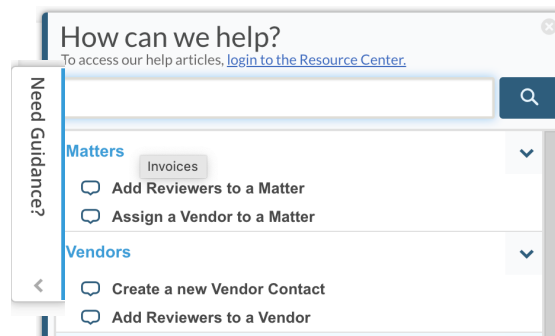
Resources



Browse the *Resource Center* in SimpleLegal for answers to commonly asked questions



Register for another training session or catch us at an office hours session



Access step-by-step walkthroughs in your SimpleLegal site

Session summary

	Topic	Details
1	Matter Intake	<ul style="list-style-type: none">• Legal requests vs. Direct create
2	Matter templates	<ul style="list-style-type: none">• Different types of matter templates• How to create a matter template
3	Custom attributes	<ul style="list-style-type: none">• Create a custom attribute• Use a custom attribute in a matter template
4	Legal request forms	<ul style="list-style-type: none">• Create a legal request form• Create a request for a matter• Approve legal requests
5	Create and manage matters	<ul style="list-style-type: none">• Direct create• Legal request

Questions?