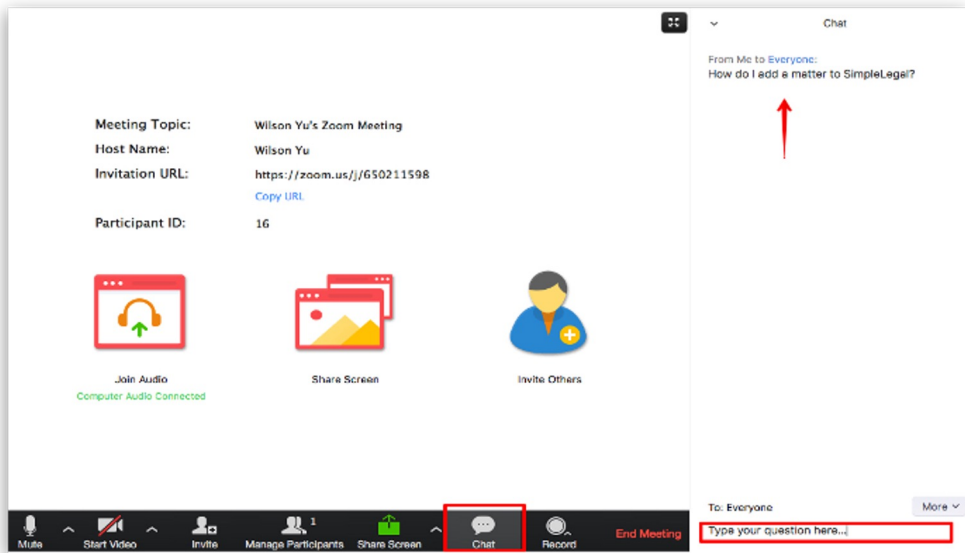**SimpleLegal**

# 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


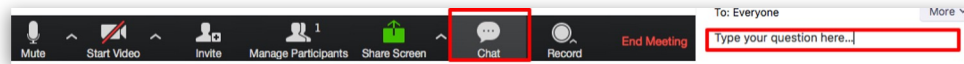
SimpleLegal

# Hi, I'm Kinda! 👋

➜ Customer Education Manager

➜ Based in Houston, TX

# Question
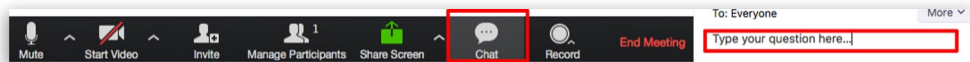## Where are you joining us from?

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?

- 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
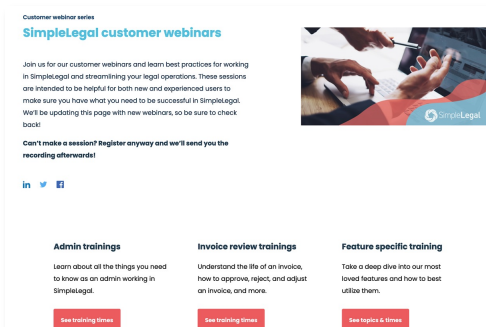
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# Matter Intake

- 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)
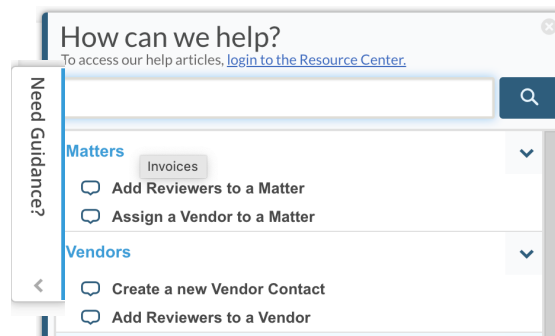
# Demo

# 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 | • Legal requests vs. Direct create |
| **2** | Matter templates | • Different types of matter templates<br>• How to create a matter template |
| **3** | Custom attributes | • Create a custom attribute<br>• Use a custom attribute in a matter template |
| **4** | Legal request forms | • Create a legal request form<br>• Create a request for a matter<br>• Approve legal requests |
| **5** | Create and manage matters | • Direct create<br>• Legal request |

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# Questions?