

How to Create Matter Folder Templates

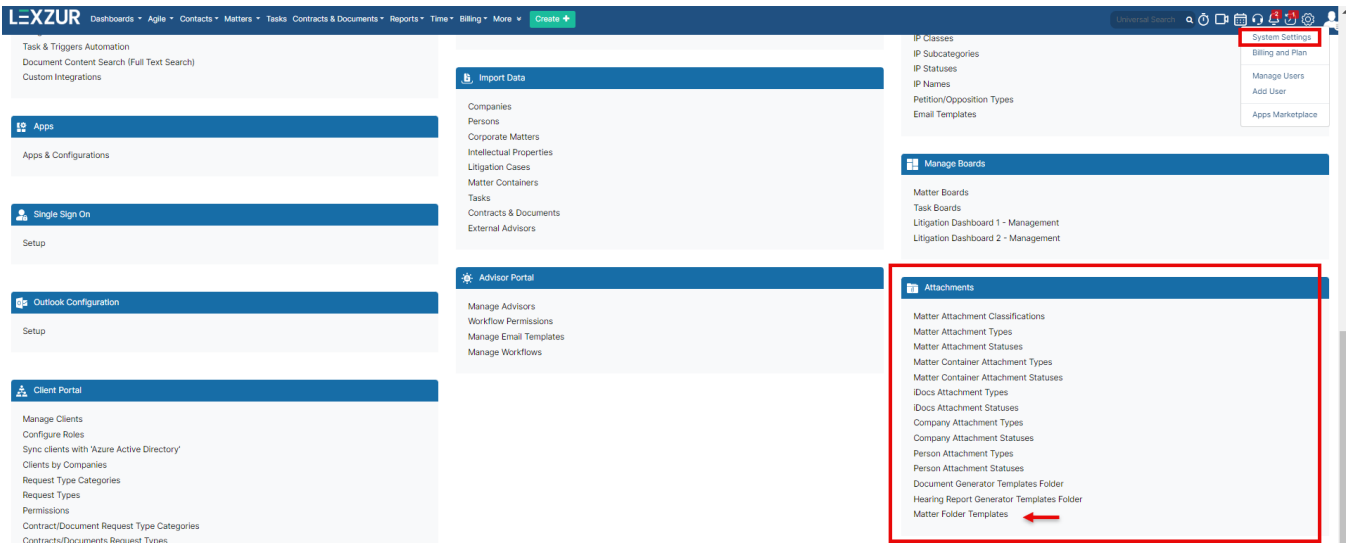
Objectives

- Automate the creation of matter folders.

Steps

Simplify your workflow by automating folder creation for matters based on practice areas. With this feature, every time you create a new matter, the system will automatically generate corresponding folders tailored to the practice area you've chosen. This intelligent automation ensures that your matter organization aligns seamlessly with your practice areas, saving you time and effort in manual folder setup.

To do so, navigate to the **System Settings Attachments Matter Folder Templates**



Here you can predefine your own matter folders based on selected practice areas, you can edit or delete any previously defined templates as well

Settings / Matter Folder Templates / Add Folder Template

Add Folder Template

Applicable on

Select Category

Practice Area

Expand All / Collapse All

Folder Templates

Related Documents

Save

Saved Templates

Total Records: 4


Category	Practice Area	Actions
Corporate Matter, Litigation Case	Administrative	Edit Delete
Litigation Case	Criminal	Edit Delete
Corporate Matter	Acquisition	Edit Delete
Corporate Matter	Agreement, Banking & finance	Edit Delete

Choose if the new template will be applied to Corporate Matters, Litigation Cases, Intellectual Properties, or Matter Containers.

Add Folder Template

Applicable on

Practice Area

Folder Templates 

Select Category

Corporate Matter

Litigation Case

Intellectual Property

Matter Container


Save

Then select the applicable Practice Areas:

Add Folder Template

Applicable on

Practice Area

Folder Templates 

Corporate Matter x

Administrative x

Acquisition

Agreement

Audit

Banking & finance

Civil

Claims

Commercial

Save

You can create, rename, delete, and edit folders by using the mouse right-click option:

← → ↺

site.app4legal.com/7691/case_folder_templates

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Settings / Matter Folder Templates / Add Folder Template

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Select Category

Practice Area

Choose Practice Area

Expand All / Collapse All

Folder Templates ⓘ 📁 Related Documents

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Now, once you create a corporate matter the system will automatically generate corresponding folders tailored to the practice area you've chosen.

For more information about LEXZUR, kindly reach out to us at help@lexzur.com.

Thank you!