

SmartAdvocate®

Tip of the Week

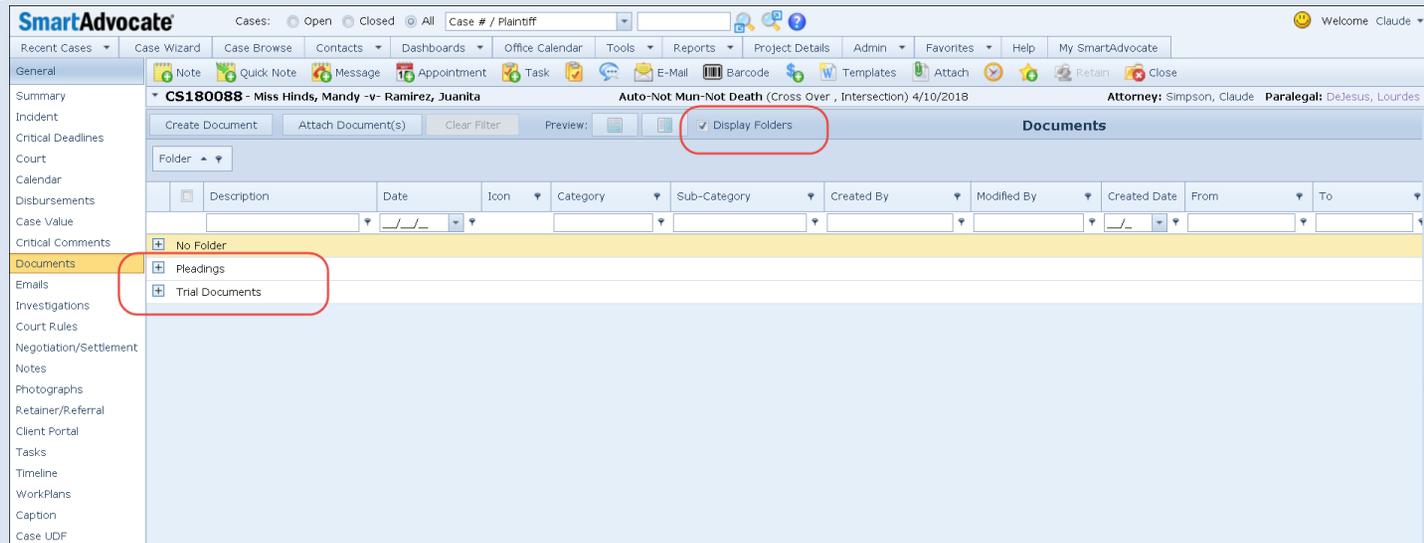
Did you know that with the most recent release of SmartAdvocate (August 2018) you can now create your own case specific document folders?

‘Document Folders’ can be used to keep a reference to existing documents in convenient groups such as “Trial Documents,” “Exchanged Documents,” “Discovery Demands,” “Discovery Responses,” etc. To create a Document Folder:

1. Right click on a document
2. Select the ‘Send to Folder’ option
3. Enter the name of the folder, such as ‘Trial Documents’
4. Click ‘Update’

To add documents to an existing folder, repeat steps 1 and 2 above, leave the ‘New Folder’ field blank and select the ‘Existing Folder’ option in step 3. To display a list of folders created as outlined above, simply check the box for ‘Display Folders’ (*See Figure 1 below*). Bear in mind that the ‘Folder’ option outlined above does not create a copy or duplicate of the documents listed on the documents page, but rather just a ‘reference’ or ‘pointer’ to the documents. So, if the document is deleted from the regular documents page, all references to the document will be removed from the folder as well. Also, Folders are case specific and are not created globally.

Figure 1



Incidentally, grouping by columns remains as a feature on the Documents Page. Here a grouping by Document Category or Sub-Category for example, will display documents in those respective lists currently in that case file. To group by a column, simply 'drag' the respective column to the location on the document page with the label 'Drag a column header here to group by that column' (top left corner of the document page). Here are examples of a Documents Page with documents grouped by Sub-Category (*Figure 2*) and the same documents page without any grouping (*Figure 3*):

Figure 2

SmartAdvocate

Cases: Open Closed All Case # / Plaintiff

Recent Cases Case Wizard Case Browse Contacts Dashboards Office Calendar Tools Reports Project Details Admin Favorites Help My SmartAdvocate

General Note Quick Note Message Appointment Task E-Mail Barcode Templates Attach Retain Close

Summary **CS180088 - Miss Hinds, Mandy -v- Ramirez, Juanita** Auto-Not Mun-Not Death (Cross Over , Intersection) 4/10/2018 Attorney: Simpson, Claude Paralegal: DeJesus, Lourdes

Incident Create Document Attach Document(s) Clear Filter Preview: Display Folders Documents

Critical Deadlines

Court Sub-Category

Calendar

Disbursements

Case Value

Critical Comments

Documents

- Answer
- Authorization
- Case Expense
- Closing Statement
- Defendant
- Email
- Interrogatories
- Invoice
- Letter
- Memorandum
- New Case

Description	Date	Folder	Icon	Category	Created By	Modified By	Created Date	From	To	Shared
(PDF version of) Plaintiff's First Set of Interrogatories to Defendant	8/31/2018 9:27 AM	No Folder		Discovery	Simpson, Claude		8/31/2018	SmartAdvocate, LLC	Gother & Thatcher, PLLC	
Plaintiff's First Set of Interrogatories to Defendant	8/31/2018 9:23 AM	No Folder		Discovery	Simpson, Claude	Simpson, Claude	8/31/2018	SmartAdvocate, LLC	Gother & Thatcher, PLLC	

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Figure 3

SmartAdvocate

Cases: Open Closed All Case # / Plaintiff

Recent Cases Case Wizard Case Browse Contacts Dashboards Office Calendar Tools Reports Project Details Admin Favorites Help My SmartAdvocate

General Note Quick Note Message Appointment Task E-Mail Barcode Templates Attach Retain Close

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Incident Create Document Attach Document(s) Clear Filter Preview: Display Folders Documents

Critical Deadlines

Court Drag a column header here to group by that column

Calendar

Disbursements

Case Value

Critical Comments

Documents

Description	Date	Folder	Icon	Category	Sub-Category	Created By	Modified By	Created Date	From	To
SmartAdvocate - Settlement Memorandum	10/9/2018 5:27 PM	No Folder		Other	Other	Simpson, Claude		10/9/2018	SmartAdvocate, LLC	
Answer to petition	10/9/2018 4:52 PM	No Folder		Readings/Legal	Answer	Simpson, Claude		10/9/2018	Gother & Thatcher, PLLC	Smart LLC
Auto-generated letter for medical request.Medical Records Request - Hospital	10/9/2018 1:57 PM	No Folder		Medical	Letter	Simpson, Claude		10/9/2018	SmartAdvocate, LLC	Abbe Hospi
SmartAdvocate - Settlement Memorandum	10/9/2018 1:43 PM	No Folder		Other	Other	Simpson, Claude		10/9/2018	SmartAdvocate, LLC	
SmartAdvocate - Settlement Memorandum	10/8/2018 5:38 PM	No Folder		Other	Other	Simpson, Claude		10/8/2018	SmartAdvocate, LLC	
COMPLAINT - AUTO - Bike v. owner & operator	10/8/2018 5:35 PM	No Folder		Readings/Legal	Summons/Complaint	Simpson, Claude		10/8/2018	SmartAdvocate, LLC	
(PDF version of) 1- Welcome Letter New Case Open	10/8/2018 5:34 PM	No Folder		Intake	New Case	Simpson, Claude		10/8/2018	SmartAdvocate, LLC	
1- Welcome Letter New Case Open	10/8/2018 5:32 PM	No Folder		Intake	New Case	Simpson, Claude		10/8/2018	SmartAdvocate, LLC	
SmartAdvocate - Settlement Memorandum	10/8/2018 1:34 PM	No Folder		Other	Other	Simpson, Claude		10/8/2018	SmartAdvocate, LLC	

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