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, simple 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

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Recent Cases 🔻	Case Wizard	Case Browse	Contacts 🔻	Dashboards	Office Ca	alendar Too	ls 🔻	Reports 🔹 Project D	etails	Admin 🔻	Favorite	s 🔹 Help	My Sma	artAdvocate				
General	Note	📸 Quick Note	🏀 Message	To Appointmen	t 🛛 🐻 Task	< 🚺 👳	<u> </u> E-	Mail 🔳 Barcode 🍇	Ŵ	Templates	Attach	8 😥	🙋 Reta	ain 🛛 🔞 Close				
Summary	* CS180	088 - Miss Hind	ls, Mandy -v- F	Ramirez, Juanita		A	uto-No	Mun-Not Death (Cross	Over	, Intersection)	4/10/2018			Attorney: S	mpson, Clau	ide Parale	jal: DeJesus, I	Lourdes
Incident	Create D	ocument A	ttach Documen	t(s) Clear F	lter F	Preview:		Display Folders				Do	cument	s				
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Court Rules																		
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Case UDF																		

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: O open O Closed O All Case # / Plantiff 🔹 🖓 🦓 🖓														
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Summary	* CS180	1088 - Miss Hinds, Mandy -v	- Ramirez, Juanita		Aut	-Not Mun-Not Death (Cross Over , Intersection) 4/10/2018 Attorney: 5					orney: Simpson, Claude	Simpson, Claude Paralegal: DeJesus, Lourdes		
Incident	Create D	ogument	ilter Previ	aw:	Display Folders Decumonts									
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Retainer/Referral	interro	igatories	8/21/2018 0:27	No. Talaka	_	Distance		Cimeron Church			0.01.0010	Country 411 11 11 11		
Client Portal		First Set of Interrogatories to	AM	No Folder	<u></u>	Discovery		Simpson, claude			8/31/2018	SmartAdvocate, LLC	PLLC	
Tasks		Defendant												
Timeline		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	
WorkPlans					DUC									
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Figure 3

SmartAdvocate' Cases: O Open O Closed O All Case # / Plaintiff 💿 🔐 🤗 🧐 O welcome Claude 🗸														
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Summary	* CS	6180088 - Miss Hinds, Mand	y -v- Ramirez, Ju	anita	A	uto-Not Mun-Not De	ath (Cross Over , Intersectio	on) 4/10/2018	Attorney: S	impson, Claude	Paralegal: DeJesus, L	ourdes		
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Calendar		Description	Date	Folder	lcon 🕈	Category 🕈	Sub-Category 🕈	Created By	Modified By 🕈	Created Date	From 🕈	То		
Disbursements		Ŷ	_/_/_ *		Ŷ	Ŷ	Ŷ	Ŷ	Ŧ	_/_ •	Ŷ			
Critical Comments		SmartAdvocate - Settlement Memorandum	10/9/2018 5:27 PM	No Folder	DOC	Other	Other	Simpson, Claude		10/9/2018	SmartAdvocate, LLC			
Documents Emails		Answer to petition	10/9/2018 4:52 PM	No Folder	PDF	Pleadings/Legal	Answer	Simpson, Claude		10/9/2018	Gother & Thatcher, PLLC	Smar LLC		
Investigations Court Rules		Auto-generated letter for medical request.Medical Records Request - Hospital	10/9/2018 1:57 PM	No Folder	Doc	Medical	Letter	Simpson, Claude		10/9/2018	SmartAdvocate, LLC	Abbe [.] Hospi		
Notes		SmartAdvocate - Settlement Memorandum	10/9/2018 1:43 PM	No Folder	DOC	Other	Other	Simpson, Claude		10/9/2018	SmartAdvocate, LLC			
Retainer/Referral		SmartAdvocate - Settlement Memorandum	10/8/2018 5:38 PM	No Folder	DOC	Other	Other	Simpson, Claude		10/8/2018	SmartAdvocate, LLC			
Tasks		COMPLAINT - AUTO - Bike v. owner & operator	10/8/2018 5:35 PM	No Folder	DOC	Pleadings/Legal	Summons/Complaint	Simpson, Claude		10/8/2018	SmartAdvocate, LLC			
Timeline WorkPlans		(PDF version of) 1- Welcome Letter New Case Open	10/8/2018 5:34 PM	No Folder	PDF	Intake	New Case	Simpson, Claude		10/8/2018	SmartAdvocate, LLC			
Caption Case UDF		1- Welcome Letter New Case Open	10/8/2018 5:32 PM	No Folder	DOC	Intake	New Case	Simpson, Claude		10/8/2018	SmartAdvocate, LLC			
Plaintiff •		SmartAdvocate - Settlement Memorandum	10/8/2018 1:34 PM	No Folder	DOC	Other	Other	Simpson, Claude		10/8/2018	SmartAdvocate, LLC			
Medical Providers Insurance	Page	1 of 2 (123 items) 🕢 👖 2 (>						Show:	🔲 Emails 🔲 O	nly High and Critical 🔲	Photog		
Vehicles	♥ <u>Cre</u>	ate Filter												