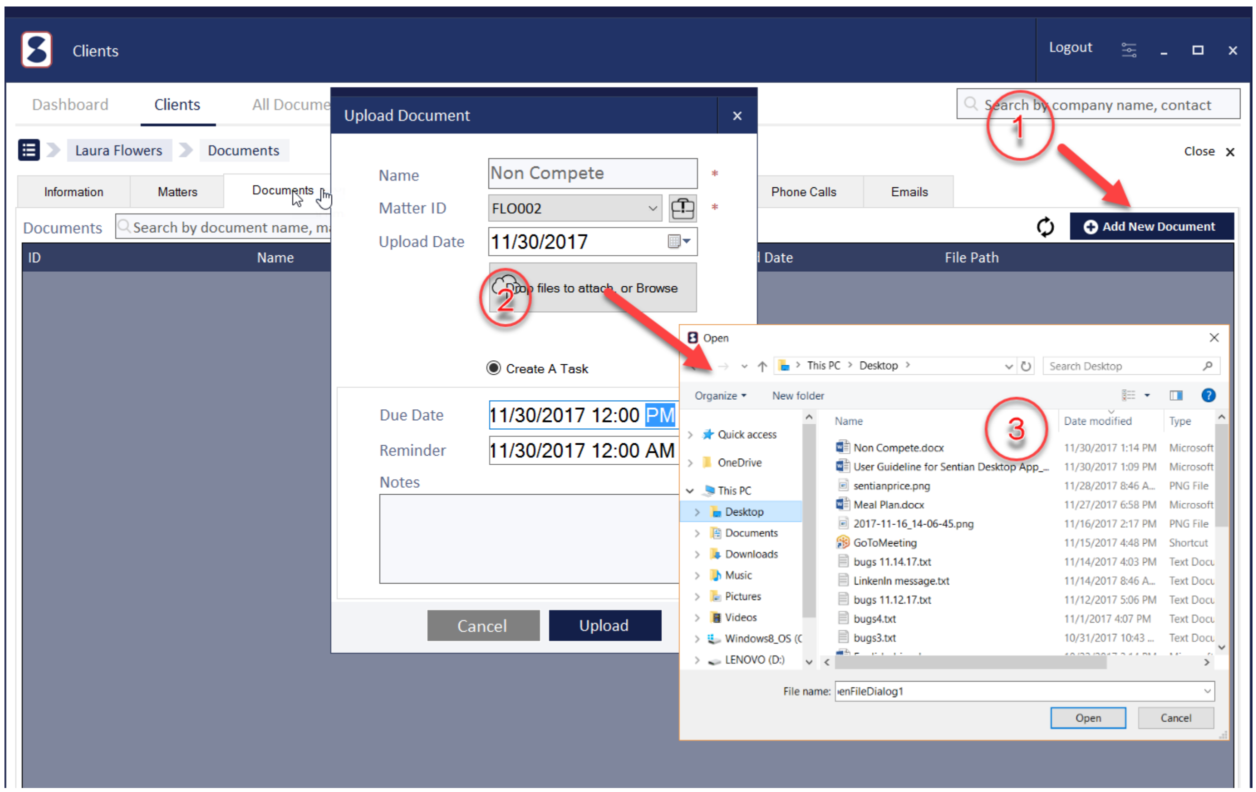
Documents

From the Client tab, click the “Edit” button to find a specific client then go to the “Documents” tab.

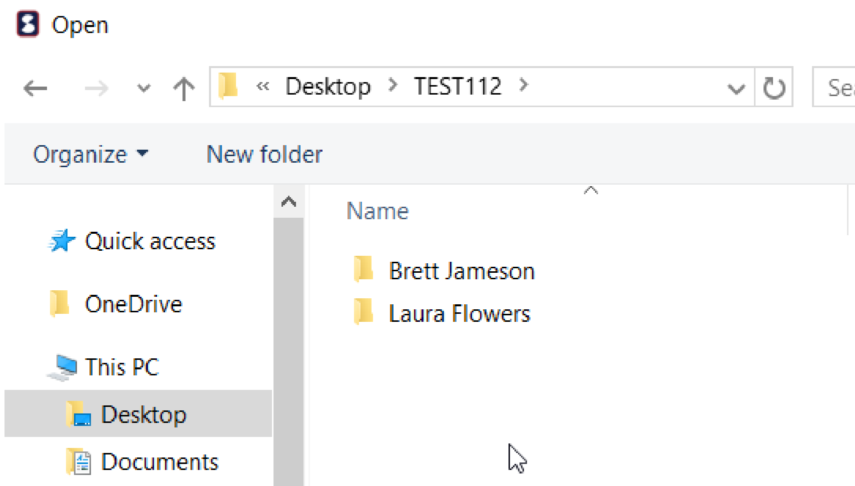
Adding new documents

You can add new documents by simply clicking the “Add New Document” button and browsing to your file location.

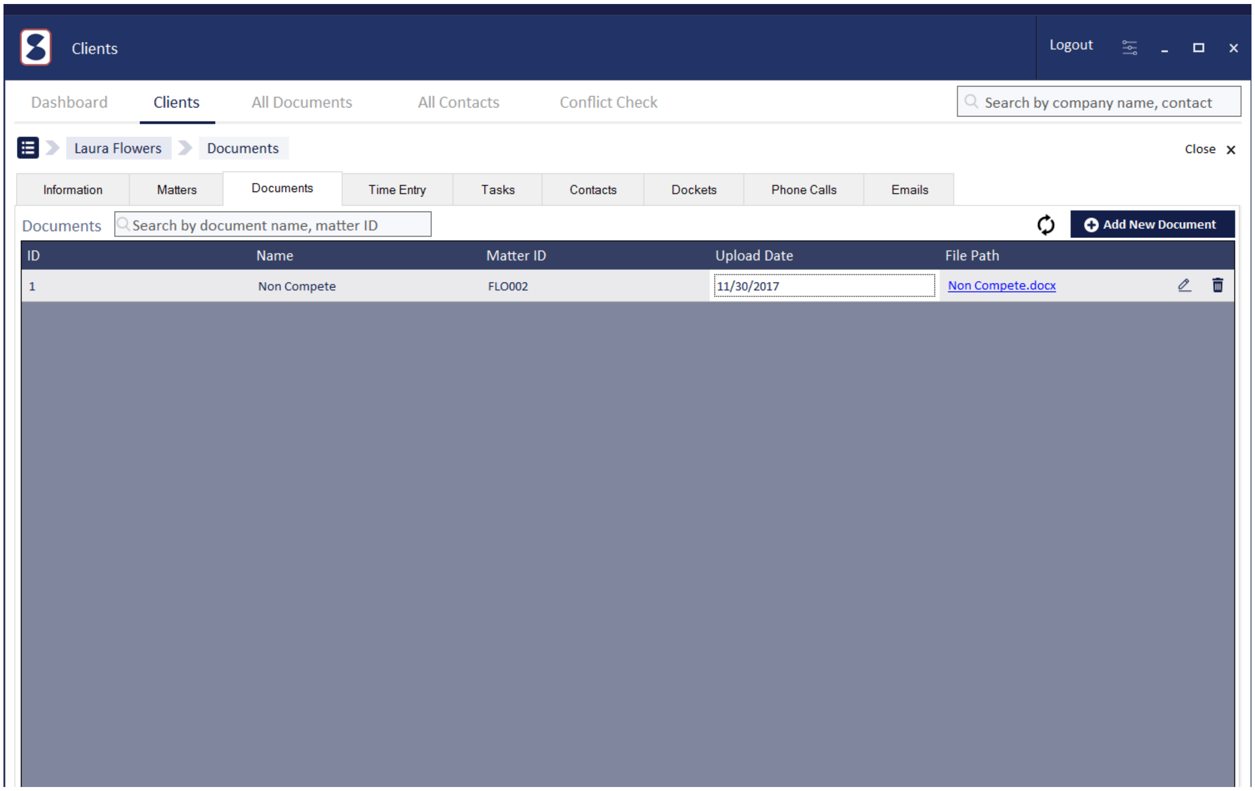


Document Auto Sync

1. After you create a matter ID, the system will create a folder with the "Matter ID" in the root directory you created when you downloaded the program.
2. You can upload a document by first selecting your client then the matter ID it's associated with. From there you can drag your document into the desired folder.



3. Once you go back into the document tab for the selected client, your document will be populated. If it isn't there, you can click the refresh icon and your document will populate the grid.



Editing an existing document

You can edit any existing documents content by clicking the "Edit" button for an existing file location. If you would like to edit the content of the document, you can click on the link associated with the document and the system will open the document from the file location in which it was initially saved. When you save the document after making changes, the changes will apply to the saved file location within the program.

Deleting an existing document

You can delete an existing document by clicking the "Delete" button. Note: Sentian Solutions does not recommend deleting documents from the program.

Searching for an existing document

You can search for an existing document by entering a search keyword such as: "document name, matter ID, etc" into the search field.

Opening Documents in the app

After clicking on the File Path your documents will open from the program you saved it in originally.