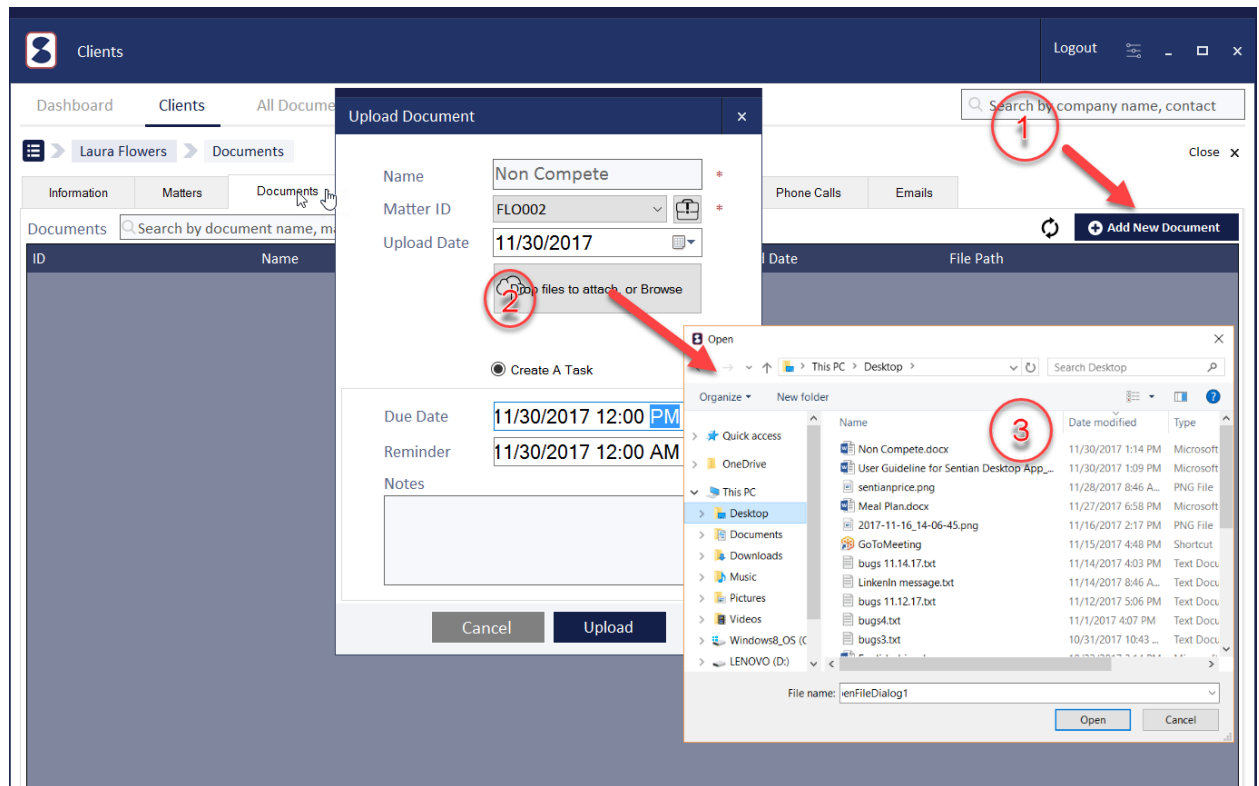


Documents

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

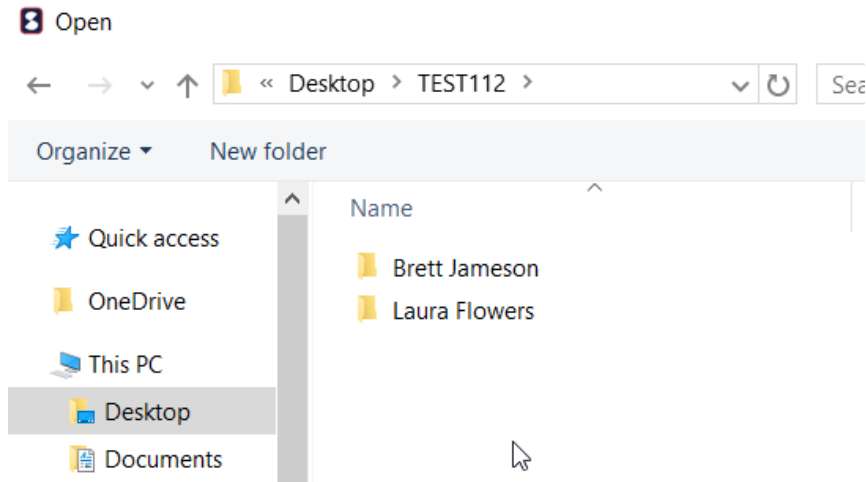
Adding new documents

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

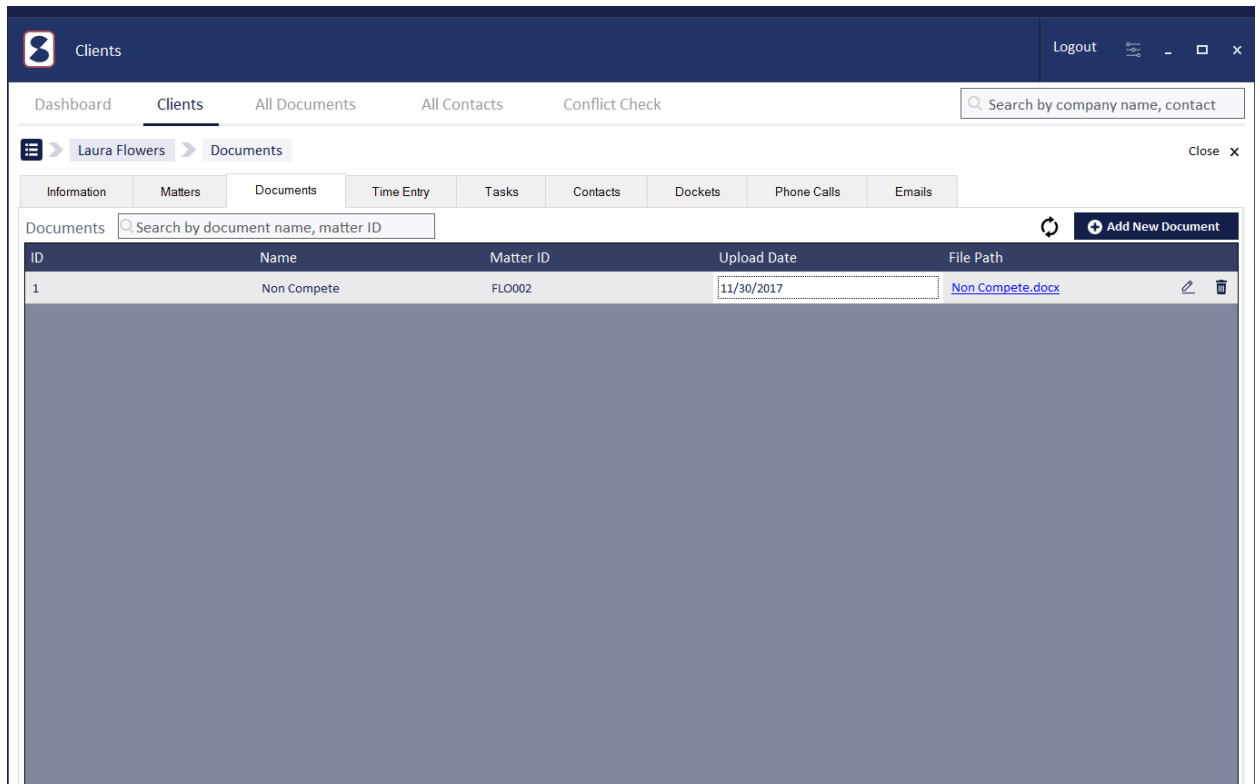


Document Auto Sync

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

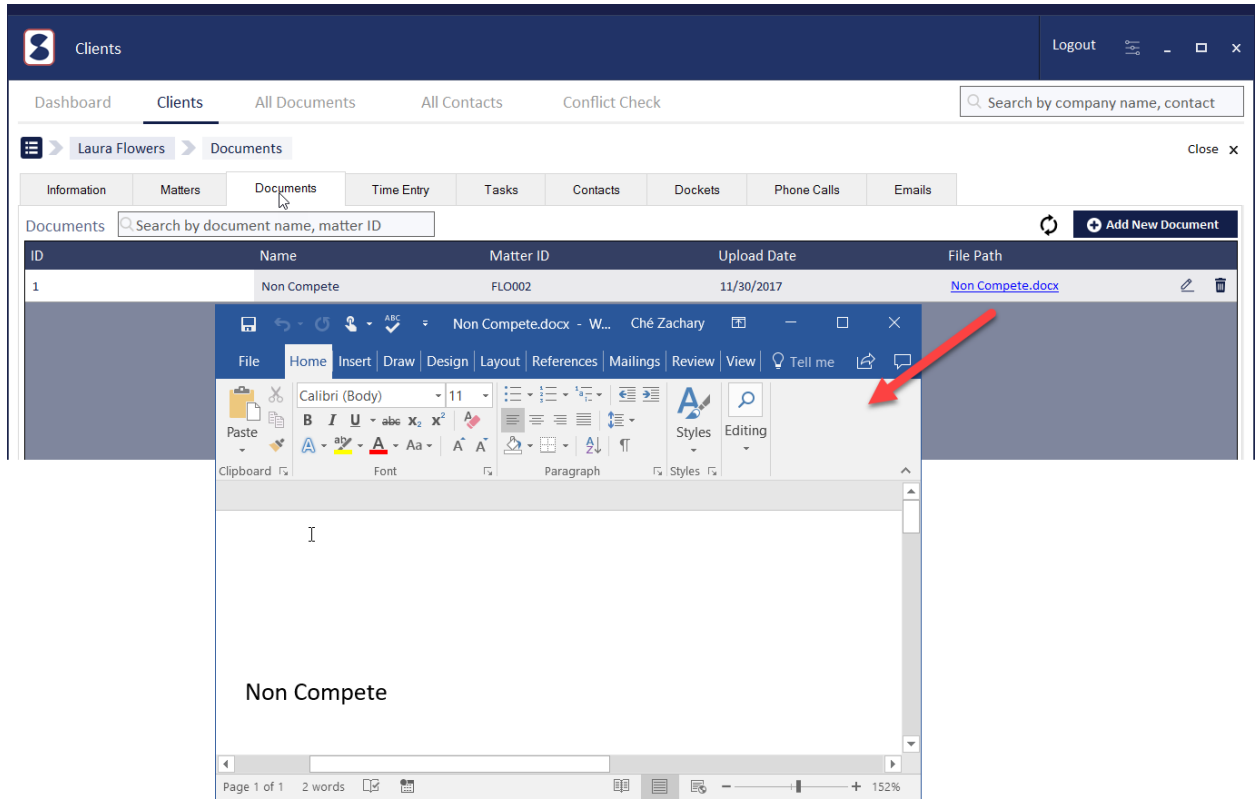
You can delete an existing document by clicking the “Delete” button. Note: Sentian Solutions does not recommend deleting documents from the program.

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.



The screenshot displays the 'Clients' application interface. At the top, there is a navigation bar with 'Clients' and a 'Logout' button. Below this is a secondary navigation bar with options: 'Dashboard', 'Clients', 'All Documents', 'All Contacts', and 'Conflict Check'. A search bar on the right allows searching by company name or contact. The main content area shows a breadcrumb trail: 'Laura Flowers > Documents'. Below this are tabs for 'Information', 'Matters', 'Documents', 'Time Entry', 'Tasks', 'Contacts', 'Dockets', 'Phone Calls', and 'Emails'. The 'Documents' tab is active, showing a search bar and an 'Add New Document' button. A table lists documents with columns for ID, Name, Matter ID, Upload Date, and File Path. The first entry is ID 1, Name 'Non Compete', Matter ID 'FLO002', Upload Date '11/30/2017', and File Path '[Non Compete.docx](#)'. A red arrow points from the 'Non Compete.docx' link to a preview window of the document. The preview window shows the Microsoft Word ribbon (File, Home, Insert, Draw, Design, Layout, References, Mailings, Review, View, Tell me) and the document content, which includes the text 'Non Compete'. The status bar at the bottom of the preview window indicates 'Page 1 of 1', '2 words', and a zoom level of '152%'.

ID	Name	Matter ID	Upload Date	File Path
1	Non Compete	FLO002	11/30/2017	Non Compete.docx