Creating Matter Stages (Custom Statuses)

Adam Field - 2026-05-13 - Comments (0) - Matters

How to Manage and Create Custom Matter Stages

Matter stages (custom matter statuses) are essential tools which allow your firm to track the specific progress of a case beyond standard system statuses. By defining these stages, you can provide clear visual markers of a case's journey, which enhances reporting accuracy and operational clarity.

Link to Video Guide: https://youtu.be/pcZ2W0usPVU?si=_IHjwM0Brq9Dq-iJ

Prerequisites

- **Admin Permissions:** You must be an **Admin** user to access the configuration menu and create new stage groups.
- **Workflow Manager Role:** To append these stages to automated workflows, you must have **Workflow Manager** or **Admin** privileges.
- **User Access:** Any user can update these stages manually within a matter once they have been created.

Accessing Stage Group Configuration

To begin managing your matter stages, you must navigate to the organisational settings within the system.

1. Locate the side navigation bar on the left-hand side of the screen.

2. Click on the **Configuration** icon (represented by the cog symbol).

3. In the top horizontal menu, select the **Organisation** tab.

4. Within the **Organisation** sub-menu, click on **Stage Groups**.

Creating a New Stage Group

If the existing predefined stages do not meet your requirements, you can create a bespoke group for specific case types.

1. In the upper-right corner of the **Stage Groups** screen, click the **+ New Group** button.

2. In the **Create Stage Group** dialogue box, enter a descriptive name in the **Title** field.

3. Select the **Case Types** dropdown menu to choose which types of matters this stage group will apply to (e.g., Advice, Business Restructuring).

4. Click the **+ Add Stage** button on the right-hand side to add individual steps to your process.

5. For each stage added:

- Enter the **Stage name** in the text field.
- Click the **Color** box next to the name to assign a specific visual identifier. *The selected colour will be reflected within the matter overview.*

6. Click **Save** to finalise the group.

Appending Stages to Workflows

Automating stage transitions ensures that the matter status updates automatically as tasks are completed.

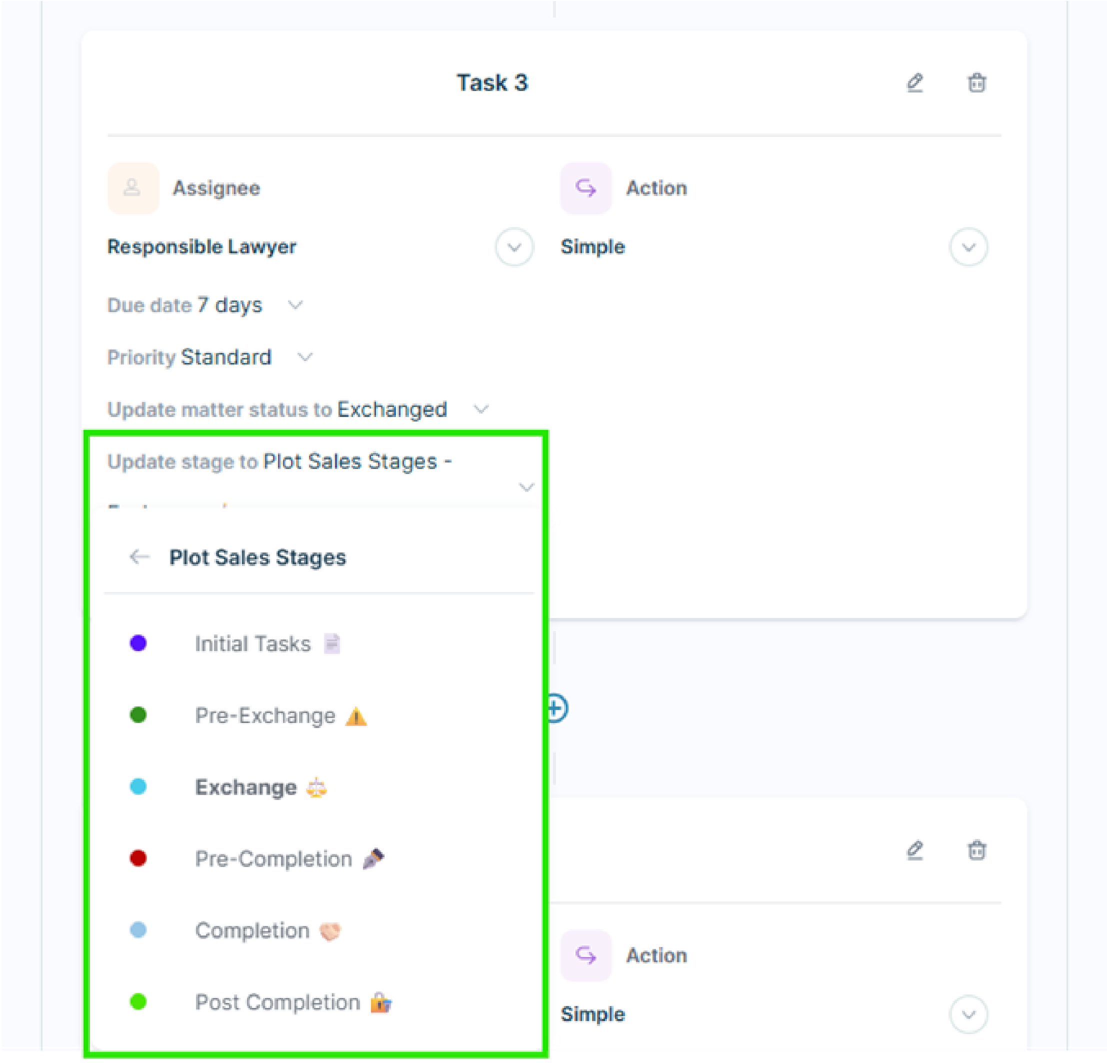
1. Navigate to the **Workflows** section from the main dashboard.

2. Select the specific workflow template which you wish to edit.

3. Locate the specific **Task** within the workflow where a stage transition should occur.

4. Within the task modal, find the field labelled **Update stage to**.

5. Select the appropriate **Stage Group** and then the specific **Stage** (e.g., "Initial Tasks" or "Exchange") that should be triggered upon task completion. *The task stage trigger update will be saved.*



Manually Updating Matter Stages

While Admins create the stages, any user can manually progress a matter through its assigned stages from within the matter file.

1. Open the specific **Matter** you wish to update.

2. At the top of the **Overview** tab, locate the current stage displayed next to the system status.

3. Click on the current **Stage** label to open a dropdown menu of all available stages in that group.

4. Select the new stage. *The matter header will immediately reflect the update.*

5. Scroll down to the **History** section at the bottom of the page to view the audit log. *The system will display the date and time the stage was changed as an audit trail.*