How to Add Folders Manually to a Matter

Max Mazo - 2026-07-14 - Comments (0) - Matters

How to Add Folders Manually to a Matter

Customising the document structure within a specific matter allows you to organise correspondence and other files in a way which suits the needs of your current case. This guide details the process for manually creating and managing folders within a matter's **Correspondence** tab.

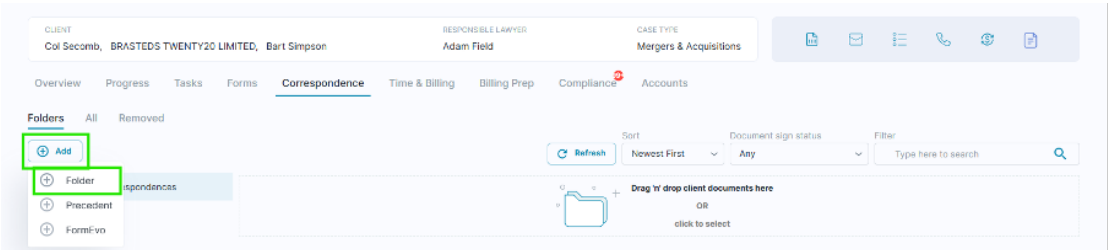
Link to Video Guide: https://youtu.be/e3E4AFpc0xE

Best Practice Note

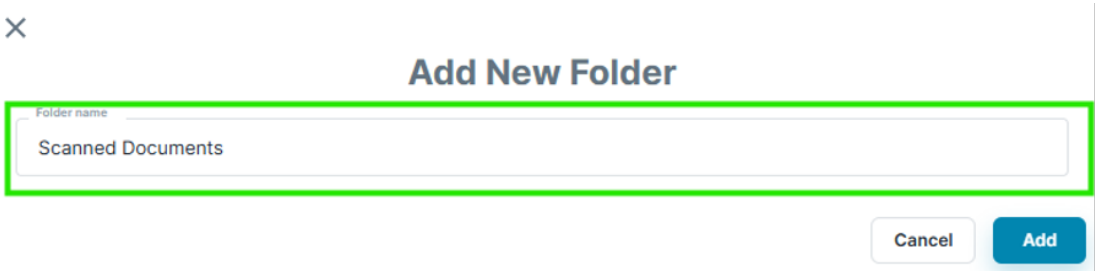
While this guide focuses on manual creation, the recommended best practice is to ask your Admin to configure default folders for specific **Case Types** within the **Configuration** section of the site. When preset in this way, these folders will automatically appear in the **Correspondence** tab for all new matters which are assigned that specific **Case Type.**

Adding a New Folder

1. Navigate to the required **Matter** summary page.
2. Click the **Correspondence** tab located beneath the matter's name in the centre of the screen.
3. In the left-hand panel, under the **Folders** section, click the **Add** button, which has a plus sign to the left of it.



1. From the menu which appears, select **Folder**.
2. A pop-up window titled **Add New Folder** will appear. Enter the desired name for the folder into the text field.



1. Click the Add button within the pop-up window.

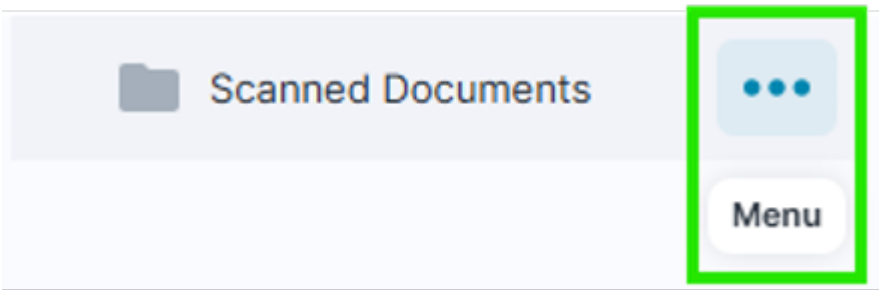
    1. The new folder will appear in the list under Folders, and a confirmation message of "Folder created successfully!" will briefly display in the upper-right corner.

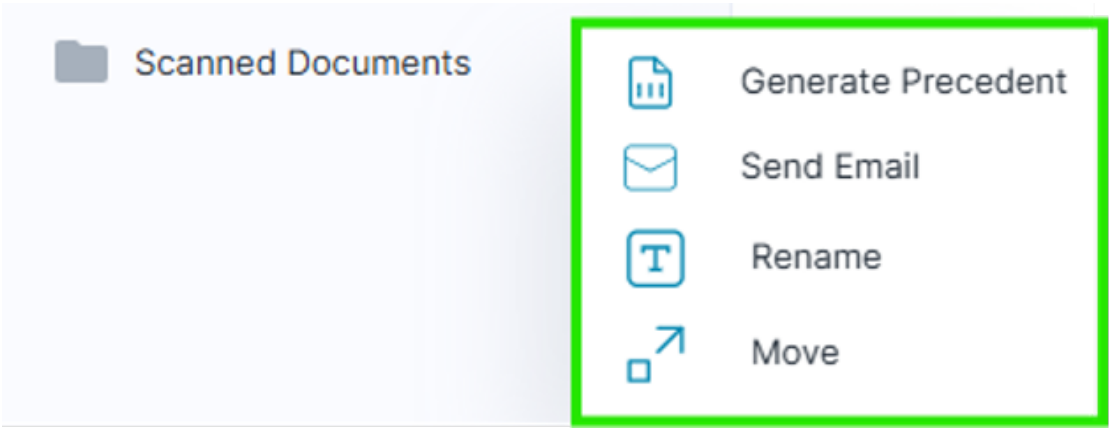
Managing an Existing Folder

Once a folder has been created, you can move, rename, or delete it, as well as use it to generate a precedent.

1. Locate the folder you wish to manage in the **Folders** list on the left-hand side.

2. Hover over the folder name and click the **three dots menu** (...) which appears on the right of the folder name.





1. Select the required action from the menu, which includes:

- **Generate Precedent**
- **Send Email**

- **Rename**
- **Move**

1. Follow any subsequent on-screen instructions to complete the action (e.g., entering a new name for **Rename** or selecting a new location for **Move**).