How to Configure Default Folders by Case Type

Max Mazo - 2025-11-03 - Comments (0) - Forms, Precedents and Templates

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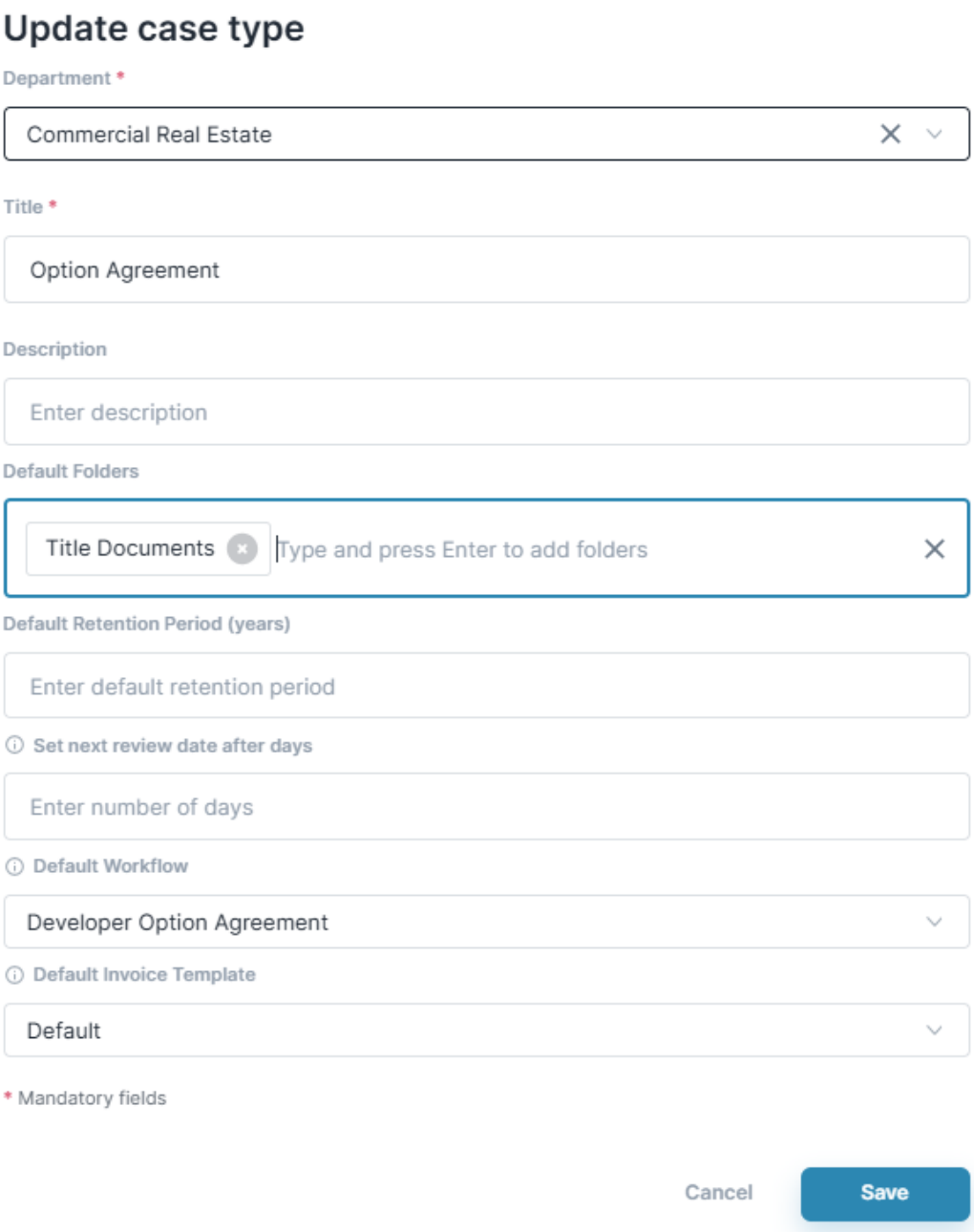
This guide explains the process for administrators to set up default folder structures which are automatically applied to new matters based on their specific case type. Implementing a default folder structure ensures consistency and standardises document management across all new matters created for that case type.

Prerequisites

- You must have **Admin** permissions to access the **Configuration** menu.
- This configuration only applies to matters which are created after the change has been saved. It will not retrospectively apply the new default folders to any existing or in-progress matters.

Setting Default Folders for a Case Type

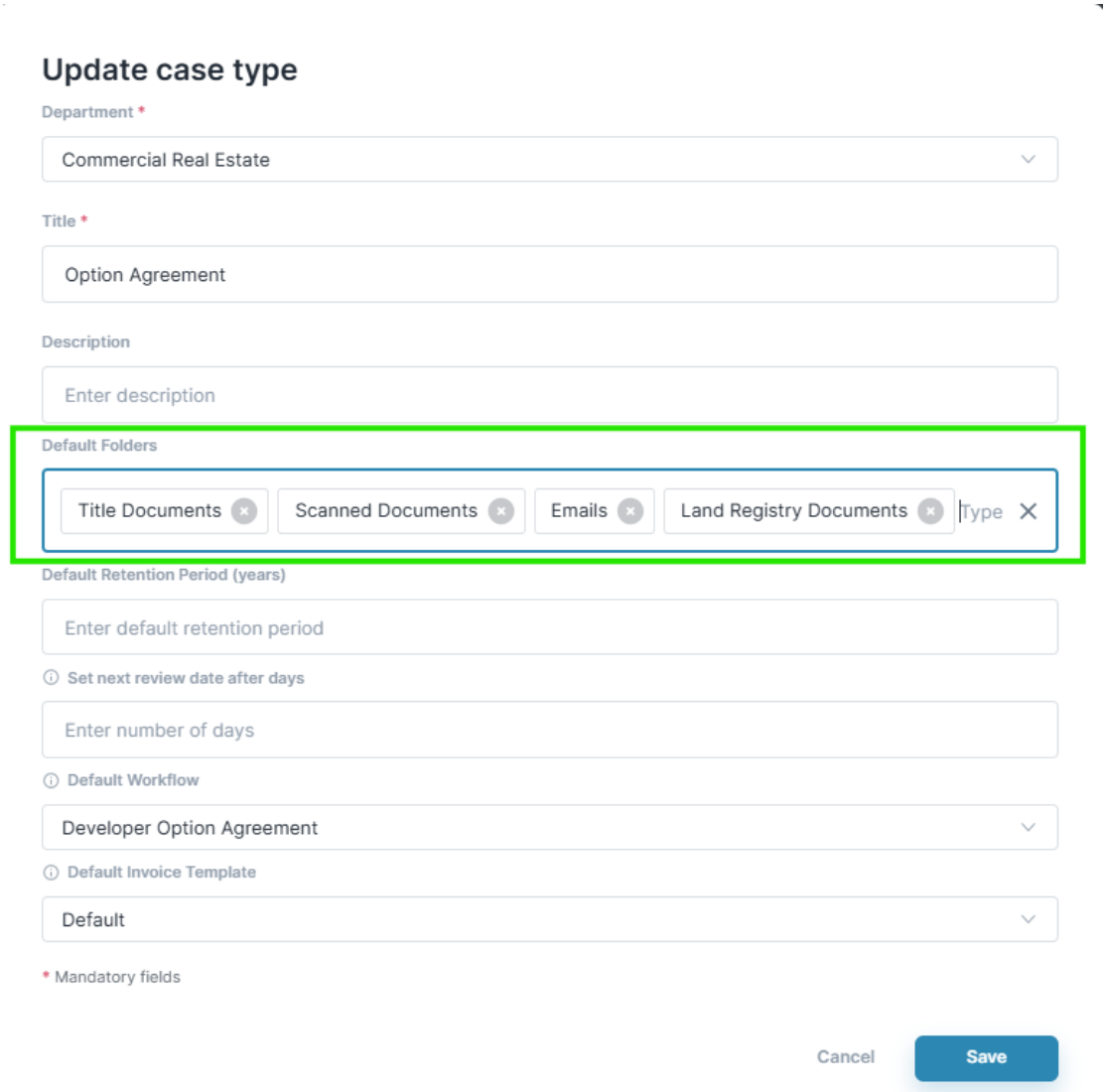
1. In the navigation menu on the left side of the screen, click on **Configuration**.
2. On the **Configuration** page, click the **Organisation** tab, which is located near the top of the screen.
3. From the sub-tabs which appear, click **Case Types**.
4. Locate the specific case type which you wish to edit in the list (e.g., **Advice**).
5. On the right-hand side of the chosen case type's row, click the **ellipsis (...)** icon.
6. From the drop-down menu which appears, select Edit. The Update case type modal will appear on your screen.



1. In the **Update case type** modal, scroll down to the **Default Folders** field.

2. Type the name of the first folder you require (e.g., "Title Documents") and press Enter on your keyboard. The folder name will be added as a tag within the field.

3. Repeat the above step for every folder which you wish to automatically create for this case type. (e.g., "Scanned Documents", "Emails", "Land Registry Documents").



1. Once all required default folders have been added, click the blue Save button at the bottom-right of the modal. The modal will close, and the default folders will be applied to all new matters which are created using this case type.