How to Create and Edit Case Types

Max Mazo - 2026-07-14 - Comments (0) - Forms, Precedents and Templates

How to Create and Edit Case Types

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

Case Types are the fundamental feature which allows your organisation to classify and manage legal matters across different departments. Creating a clear structure of Case Types is essential for accurate reporting, efficient workload distribution, and consistent case handling across your firm. This guide details the process for both adding a new type and modifying an existing one.

Prerequisites

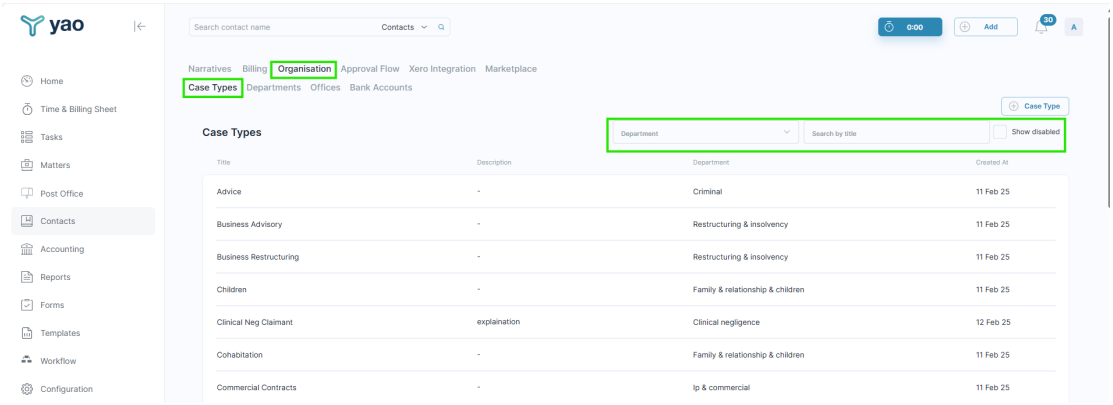
To maintain the integrity of the system's core structure, the following conditions must be met before performing this procedure:

- The user undertaking this task must have **Admin** permissions, which is what grants the necessary access to the Configuration section of the platform.

Navigating to the Case Types Configuration Area

The process for creating or editing a Case Type always begins by navigating to the core configuration section of the platform.

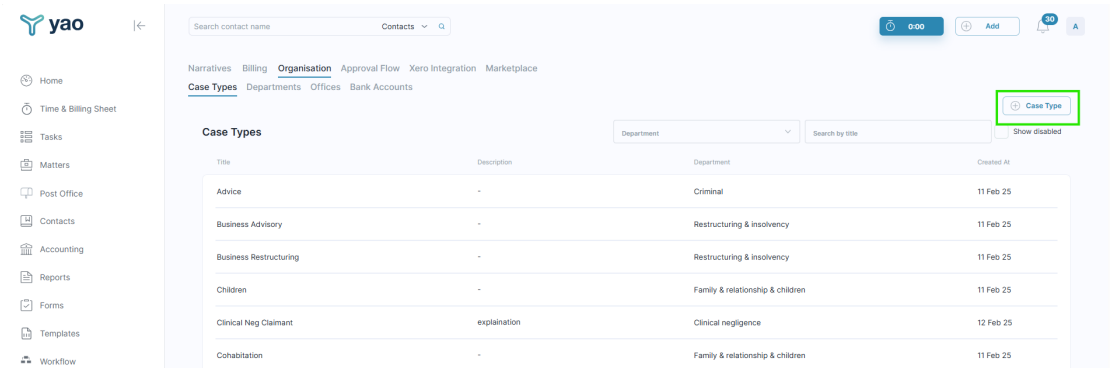
1. In the left-hand navigation menu, click **Configuration**.
2. In the main content area, click the **Organisation** tab, which is located at the top of the screen next to 'Billing' and 'Approval Flow'.
3. Click the Case Types tab, which will display a list of all current Case Types within your system. The Case Types list, including the Title and associated Department, will now be visible.



Creating a New Case Type

This procedure guides you through defining a new Case Type and its default settings.

1. In the upper-right corner of the Case Types screen, click the Case Type button. The 'Create case type' modal window will appear.



1. From the **Department** dropdown menu, select the relevant department to which this new Case Type will belong.

2. In the **Title** field, enter a clear, descriptive name for the new Case Type (e.g., 'Commercial Dispute Resolution').

3. In the **Description** field, enter a brief summary which explains the purpose of this Case Type.

4. In the **Default folders** field, type the names of any folders which you require to be automatically created within a new case of this type, pressing Enter after each one.

5. Enter the number of years for the mandatory document destruction period in the **Default retention period (years)** field.

6. Enter the number of days after expiry when a review of the matter should occur in the **Default review period (days after expiry)** field.

7. In the **Number of days** field, enter the number of days after the case is created when the system should automatically generate the next invoice review date.

8. Select the desired default invoice template from the **Default Invoice Template** dropdown menu.

9. Click the Add button at the bottom of the modal window. The new Case Type is created and now appears

in the Case Types list.

Editing an Existing Case Type

You can modify the properties of any existing Case Type by following these steps.

1. On the main Case Types screen, navigate to the row containing the Case Type which you wish to modify.
2. On the far right of the row, click the vertical **three dots** (⋮) menu icon.
3. From the dropdown menu, select Edit. The 'Update case type' modal window will appear, pre-populated with the existing settings.
4. Make any necessary changes to the fields, such as updating the **Description**, adjusting the retention and review periods, or modifying the default folders.
5. If required, use the **Default Workflow** dropdown to associate this Case Type with a specific workflow, which will trigger automatically when a new case of this type is created.
6. If required, use the **Default Document Template** dropdown to associate a specific document template which is to be used for this Case Type.
7. Click the Save button at the bottom of the modal window. The Case Type settings are updated across the platform.