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How to Duplicate Documents for Version Control in a Matter

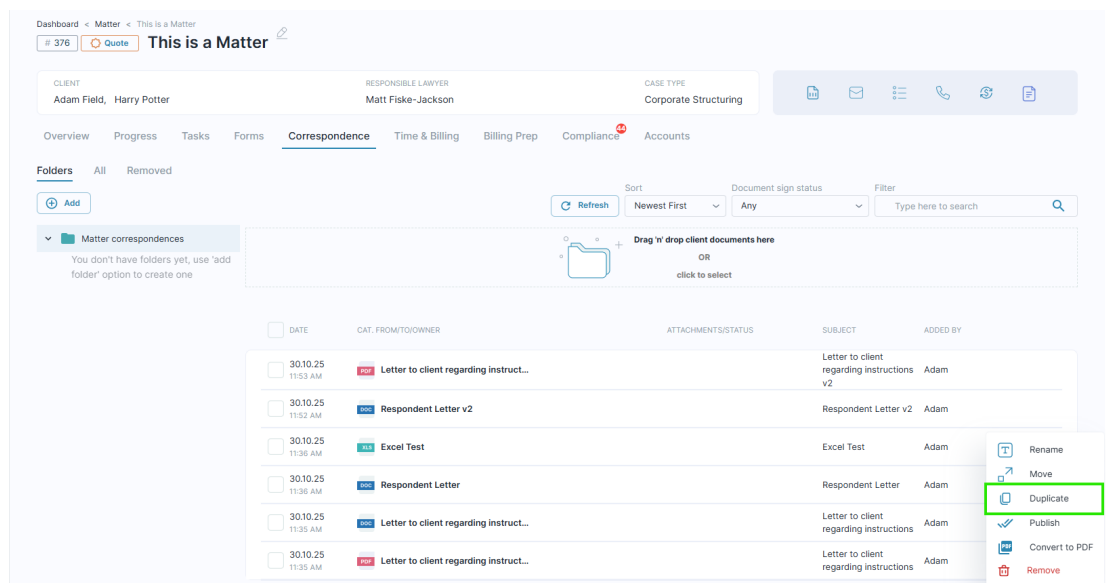
Max Mazo - 2025-11-03 - [Comments \(0\)](#) - [Matters](#)

How to Duplicate Documents for Version Control in a Matter

Duplicating a document allows you to create an exact, new copy of an existing file within a matter. This process is essential for **versioning** documents, which ensures that you retain the original file while making amendments and changes to the new copy. This procedure works for any document type, including PDF, Excel, and Word files.

Duplicating a Document

1. **Locate** the matter which contains the document you wish to duplicate.
2. Navigate to the Correspondence tab which is situated along the top of the Matter menu. The list of documents in the correspondence folder will appear.
3. **Find** the specific document you wish to create an additional version of.
4. Click the menu ellipses (...) icon located on the far right of the document's row. A drop-down option menu will appear.



1. Select the Duplicate button from the drop-down menu. The Duplicate File modal screen will appear.



Update File

File name

Letter to client regarding instructions V2

Cancel

Update

1. **Rename** the file by typing the new version name (e.g., "Respondent Letter v2") into the text field.
2. Click the Duplicate button on the modal screen to confirm the process. The new document version will appear in your Correspondence list with the new name, which indicates the duplication has been successful.