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How to Manually Add a Precedent to a Matter

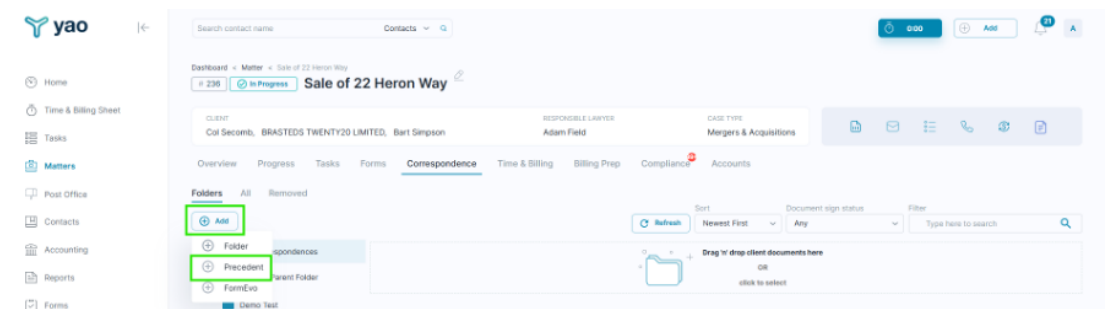
Max Mazo - 2025-10-24 - [Comments \(0\)](#) - [Matters](#)

How to Manually Add a Precedent to a Matter

This guide explains how to manually add an ad hoc precedent (document or letter) to a matter. This manual process is intended for one-off documents which are not part of a standard case process. However, the best practice is always to configure your precedents to be automated via the workflow, which will ensure greater efficiency and consistency across your firm.

Manually Adding a Precedent

1. Navigate to the open matter and click on the **Correspondence** tab which is located along the top of the matter details screen.
2. On the left-hand side, below the **Folders** list, click the **Add** function which is indicated by a plus sign.

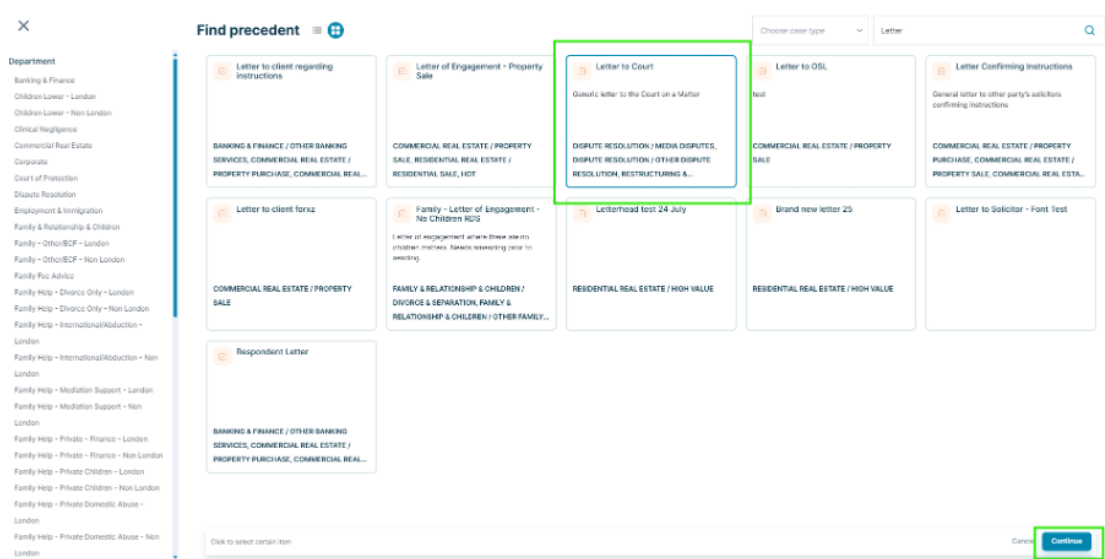


1. From the menu which appears, select **Precedent**.
2. The **Find Precedent** window will open. By default, the list of precedents which first appears is filtered to the matter type you are currently viewing.
3. To access a full list of all precedents in the system, click the drop-down menu in the upper-right corner which currently displays the matter type.
4. Select **None** from the list to clear the matter type filter.
5. Clear the **Department** filter on the left-hand side of the window.



1. Locate the desired document or letter from the comprehensive list and click on it to select it. A blue

outline will appear around the selected precedent and the **Continue** button will highlight blue at the bottom-right of the screen.



1. Click **Continue**. The selected precedent will load into the matter and will now appear in your **Correspondence** folder.

Viewing the Added Precedent

1. To view the newly added document, click on the **letter description** in the correspondence list on the main matter screen.
2. The content of the document will display in the viewing pane on the right-hand side of the screen.