

How to Manually Add a Workflow to a Matter

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How to Manually Add a Workflow to a Matter

This guide provides the instructions for adding a workflow to an existing matter, which is useful when a standard process needs to be applied after the matter has been created. Workflows ensure that all essential procedural steps are tracked and completed by the assigned staff member, which maintains consistency across your firm.

Best Practice: Assigning a Default Workflow

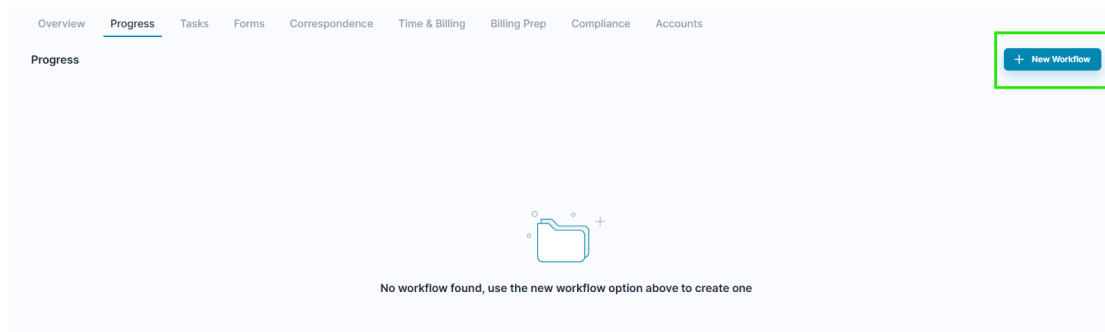
Manually adding a workflow should generally be avoided where possible. The most efficient and reliable practice is to associate a default workflow with a specific **Case Type** within your system's configuration.

By setting a default workflow, the system will automatically apply the full set of necessary tasks and requirements as soon as a new matter of that **Case Type** is created, which ensures no steps are missed. If the system is correctly configured, manual addition will not be necessary.

Manually Adding a Workflow to a Matter

If a matter's required workflow was not added automatically or if an additional workflow is required, follow the steps below to manually apply one to the matter file.

1. **Navigate** to the specific matter which requires a new workflow.
2. In the centre-top section of the matter screen, click the **Progress** tab.
3. In the view which appears, locate the sub-tabs immediately below the matter details and click the **Workflow** sub-tab.
4. In the upper-right corner of the screen, click the + **New Workflow** button.



1. **Review** the list of available workflow templates. You may use the filter fields at the top of the table to

quickly locate the required template.

2. **Click** on the name of the workflow template which you wish to add to the matter (e.g., **SDLT** or **Completion Statement**). A new pop-up window will open with a summary of the tasks which will be added.

Completion Statement

Review the tasks to be added and remove any section you do not need

→ Fees1 tasks

→ Use Completion Statement Form to Prepare Completion Statement

→ Send Completion Statement to Client2 tasks

→ Review Completion Statement

→ Email Completion Statement to Client

1. Review the tasks and sections listed. If there are any sections which you do not require, click the checkbox next to the section title to deselect it. (e.g., The video deselects Fees in the Completion Statement example.)
2. Click the Continue button in the bottom-right corner. The workflow will be added to the matter and its current progress and steps will now be visible in the Workflow sub-tab.

Completion Statement

Review the tasks to be added and remove any section you do not need

→ Fees 1 tasks

→ Use Completion Statement Form to Prepare Completion Statement

→ Send Completion Statement to Client 2 tasks

→ Review Completion Statement

→ Email Completion Statement to Client

Cancel

Continue

1. From the Progress tab Click on the workflow name to expand the task list, which will allow you to view the individual steps and who the tasks are assigned to, by clicking on the menu icon you can change who the tasks are assigned to, the Task heading, the priority status and the date it is due by.

Removing an Assigned Workflow

If an incorrect workflow has been manually added to a matter, you can remove it by following these steps:

1. **Locate** the workflow which you wish to remove in the main **Workflow** sub-tab view.
2. **Click** the menu icon beside the workflow name. A bin icon (**Remove**) will appear to the right of the date.
3. **Click** the **Remove** bin icon.
4. **Confirm** the action by clicking **Confirm** in the pop-up dialogue box. The workflow will be immediately removed from the matter.