How to Use Precedent Documents and Email Templates within a Matter

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

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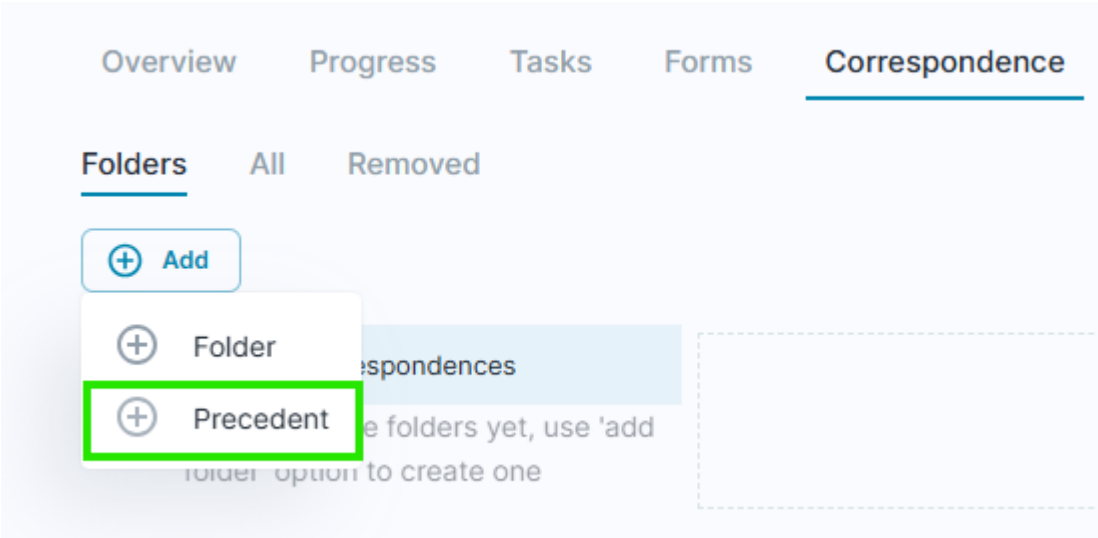
Link to Video Guide: https://youtu.be/XTkfVnpyns8

This guide provides instructions for efficiently generating standardised documents and emails directly from an active matter. Using pre-configured documents (precedents) and email templates is what will help to ensure consistency across your client communication and streamline the correspondence process.

Adding a Precedent Document to a Matter

This process adds a pre-configured document template to the matter's correspondence list, which can then be edited and sent.

1. From the active Matter Dashboard, click the **Correspondence** tab at the top of the matter overview.
2. In the left-hand menu panel, click the **+ Add** button located below the list of folders.
3. From the drop-down menu which appears, select **Precedent**.



1. The Find precedent dialogue box will open, displaying all available documents. Locate the required precedent document.

2. Select the relevant document, for example, the **Letter Confirming Instructions** template, which includes a description outlining its use.

3. Click the **Continue** button in the lower-right corner.

    - The Document Letter Confirming Instructions successfully generated on the matter.

4. The newly generated document will now appear in the list under the **Correspondence** tab, where you can double-click it to open a preview and complete any required edits.

You can also now also generate a precedent from the matter overview screen;



And a new feature added you can run precedents from designated contacts on a matter, either the client or the related contacts



Using a Precedent Email Template and Attaching Matter Correspondence

This process allows you to quickly draft an email using a saved template and directly attach existing documents from the matter's correspondence history.

1. Ensure you are on the **Correspondence** tab of the matter.

2. In the upper-right corner of the correspondence list, click the **Send an Email** icon (which looks like an envelope with an arrow).



1. The Email Correspondence dialogue box will appear.

2. Near the upper-right corner of the dialogue box, click the **USE TEMPLATE** link.



1. The Use template dialogue box will open, displaying all available email templates.

2. Select the template which you require, for example, **Litigation - Initial Email to Opposing Solicitor.**

3. Click the **Continue** button in the lower-right corner.

    - The email subject line and body text are populated with the content from the selected template.

Attaching Existing Documents

To attach a document already associated with the matter, follow these steps while the Email Correspondence dialogue box is still open:

1. In the body of the email, click the **Upload from correspondences** button located in the footer.

2. From the small pop-up menu, select **Upload correspondences**.

3. The **Correspondence** dialogue box will open, displaying a list of all documents and correspondence saved to the current matter.

4. Select the required document, such as the **Letter Confirming Instructions** document which you previously generated.

5. Click the **Choose** button in the lower-right corner.

    - The selected document is attached to the email and can be seen above the **Send** button.

6. Complete the recipient field and subject line as required, and click **Send** to dispatch the email.