SimpleLegal

Legal Requests

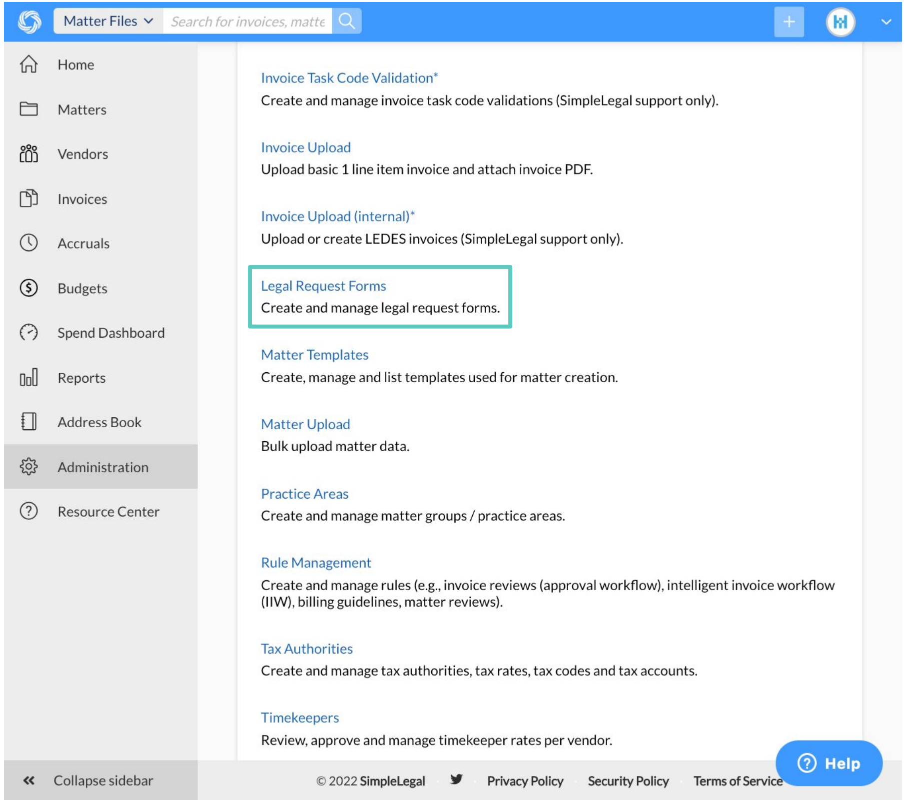
Admin Self-Training

Create and manage forms

Legal Request forms are used to ensure you collect the right information in order to determine whether to approve a legal service request or not. You can have multiple forms for different types of requests, for instance, one for contract reviews, another for IP requests, and so forth.

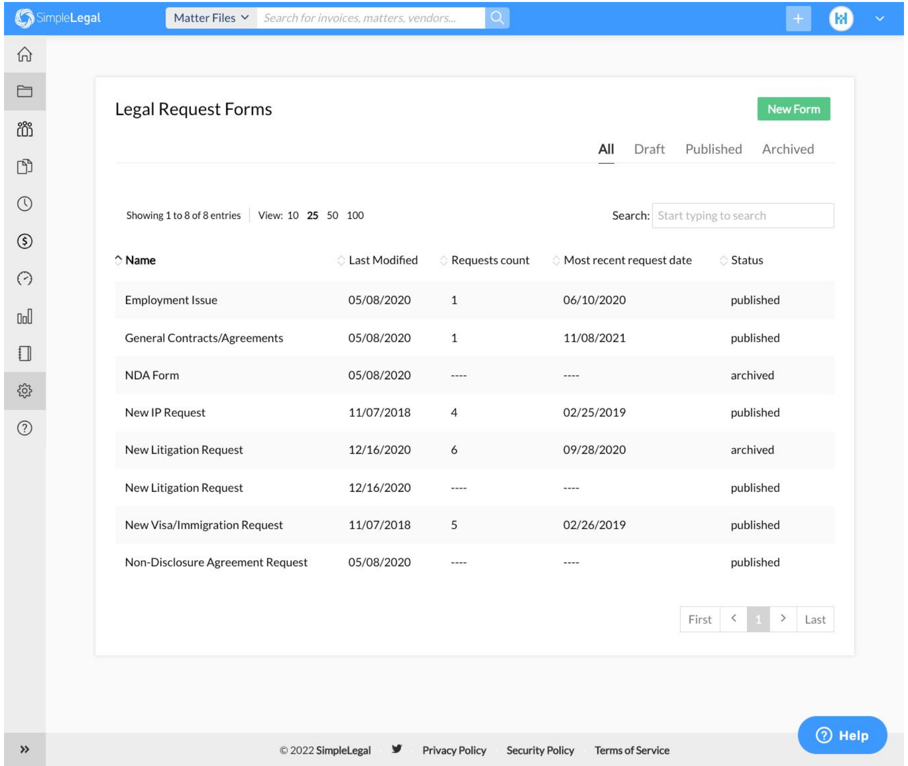
Step 1

1. From the left navigation menu, go to **Administration**.
2. Click on **Legal Request Forms**.
   a. This is where you will go to create and manage all your Legal Request template forms.



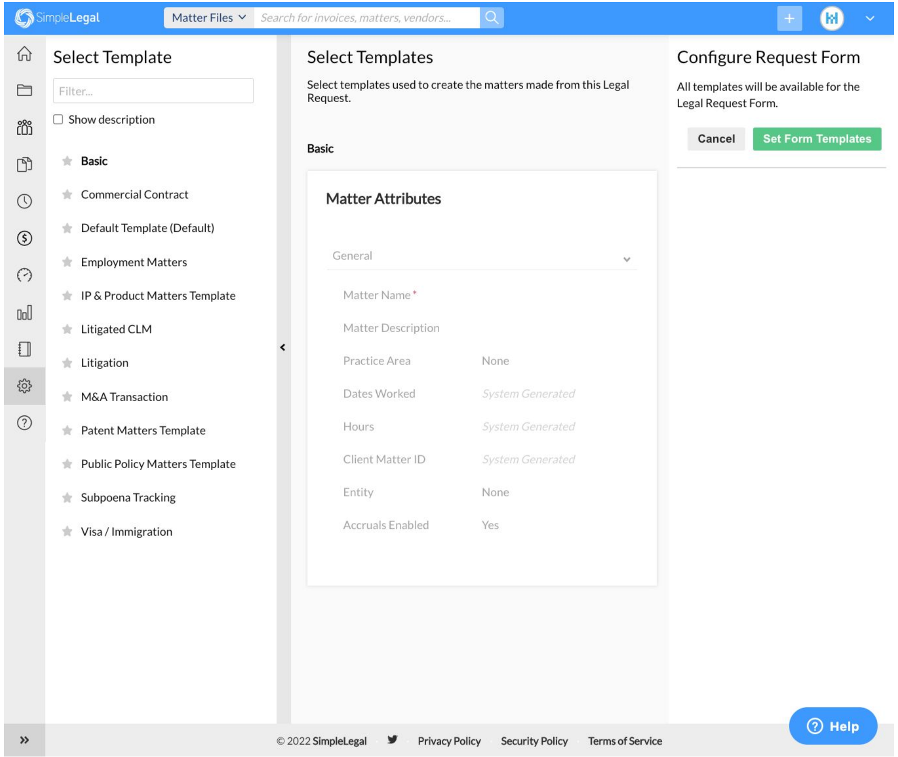
Step 2 - Legal Request Forms

1. Here you can create and manage all your published and archived Legal Request form templates.
2. Click the green **New Form** button to create a new form.



Step 3 - New Form

1. All of your Matter Templates will be available here to clone in order to speed up creating new forms.
2. Click on the green **Set Form Templates** button to create a new template.



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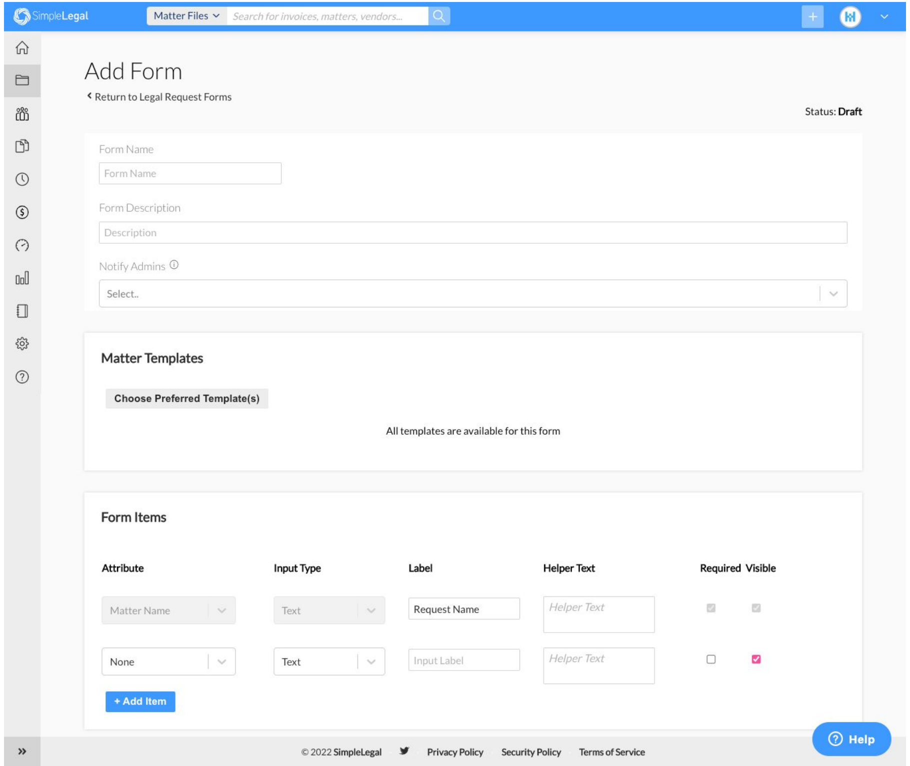
Step 4 - Set Form Template

1. Here you can configure and create new form templates.
2. Your previously selected template should show up under **Matter Templates**. If you would like to change or add a template, you can do so by clicking **Choose Preferred Template**. You can easily change this template on the matter later if you don't know or don't want to select one now.
3. List out which attributes or form inputs are needed for a matter to be created.

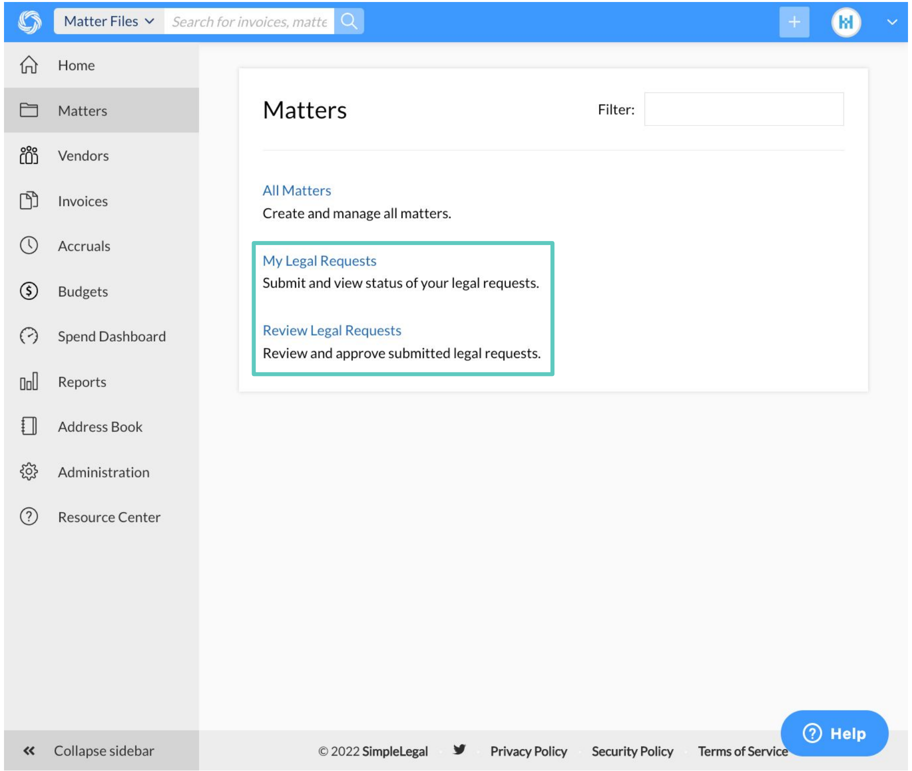


Form submission and approval

Once a Legal Request form is submitted, it gets routed to the admin for review and approval. If approved, a new matter is automatically created within SimpleLegal for tracking and management. If rejected, the requestor gets notified and the admin/reviewer can leave a note with an explanation of why.

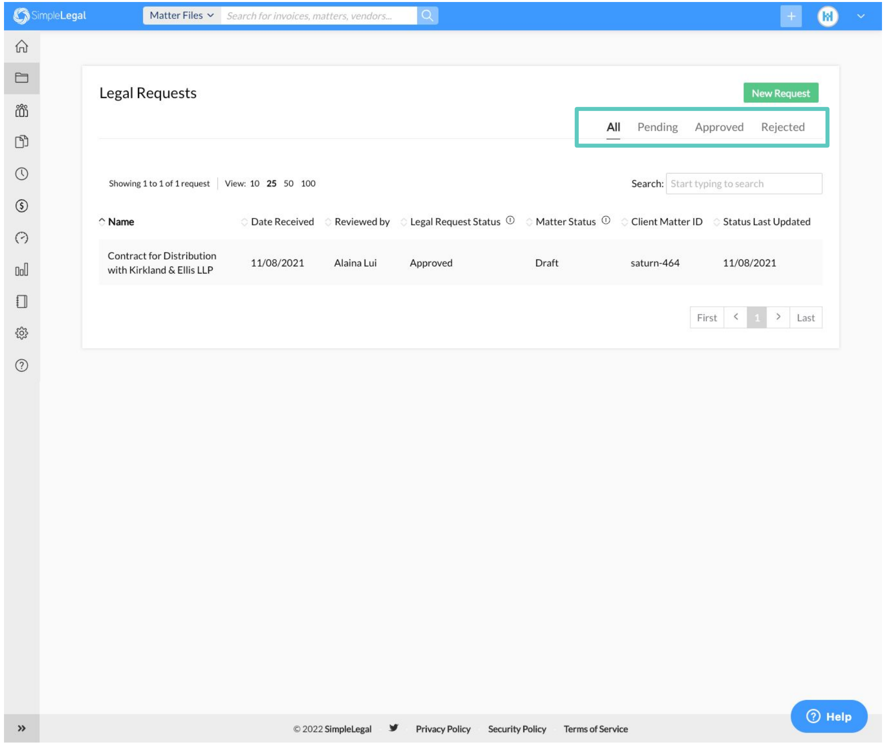
Submit, review, and approve forms

1. From the left navigation menu, go to **Matters**.
2. There are two Legal Request sections available:
   a. Click **My Legal Requests** to submit and view the status of your submitted legal requests. This is also where users will click within their system to submit a legal request.
   b. Click **Review Legal Requests** to review and approve/reject submitted legal requests from users.



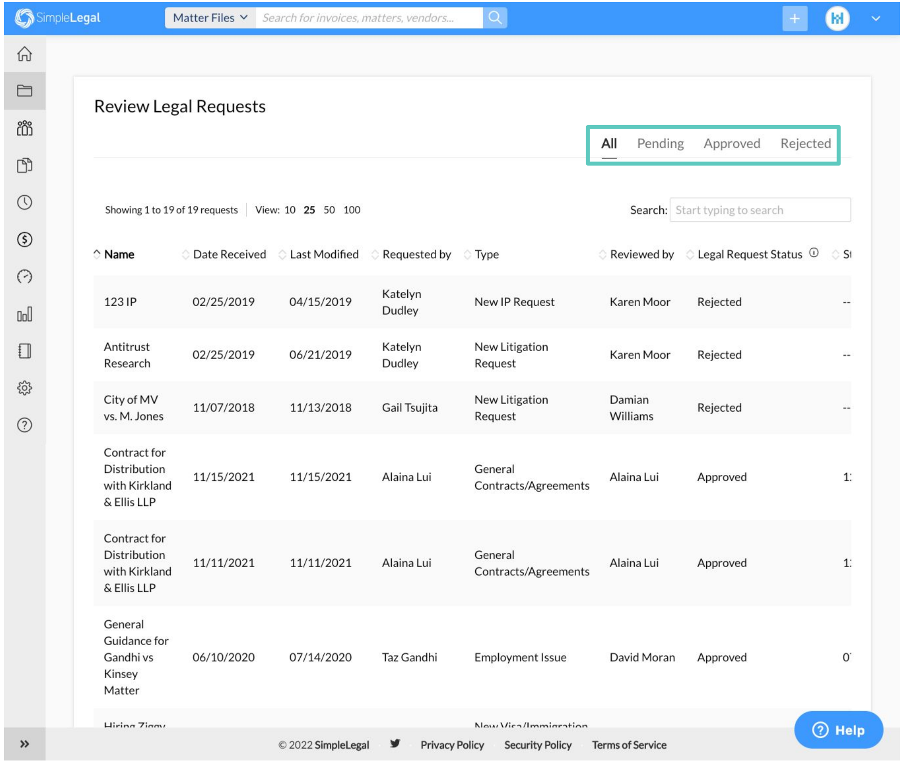
My Legal Requests

1. After clicking on **My Legal Requests**, you can view all your previously submitted legal requests and their approval status here.
   a. The requests are grouped by approval status under separate tabs in the top right corner.
2. On this page, you can also submit new legal requests by clicking the green **New Request** button.



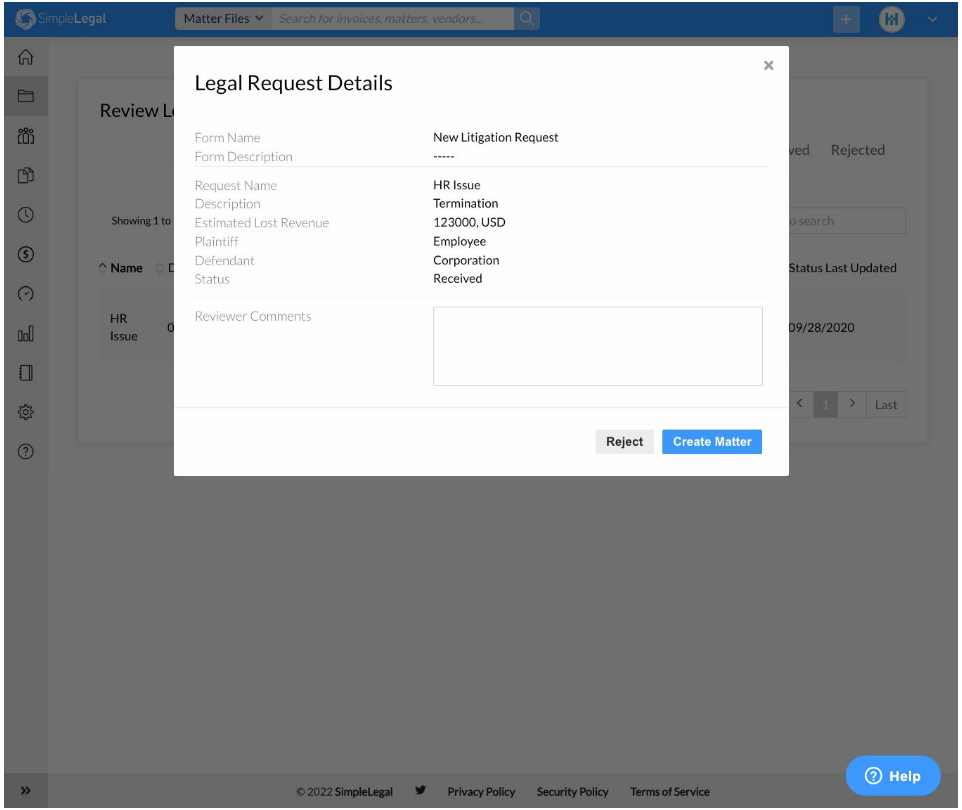
Review Legal Requests

1. Click on **Review Legal Requests** from the **Matters** section to approve or reject other legal request submissions.
    a. Use the tabs located on the top right to view form submissions by status.
        i. View past **Approved** or **Rejected** requests.
        ii. Review **Pending** legal requests that are waiting for your review.



Approve Legal Requests

1. Under the **Pending** tab, you can approve or reject a legal request.
2. Simply click on each line item and a pop-up box will appear, prompting you to **Reject** or **Create Matter** (approve).
3. Clicking **Create Matter** automatically turns the request into a matter.
4. Clicking **Reject** denies matter creation and sends it back to the user.
   a. Be sure include notes on why!
   b. Relay any clarifications or edits needed for approval.



For more information...

Your CSM can assist you in creating some basic forms depending on your organization's needs.

- Reach out to your CSM directly or contact success@simplelegal.com, we're happy to help!