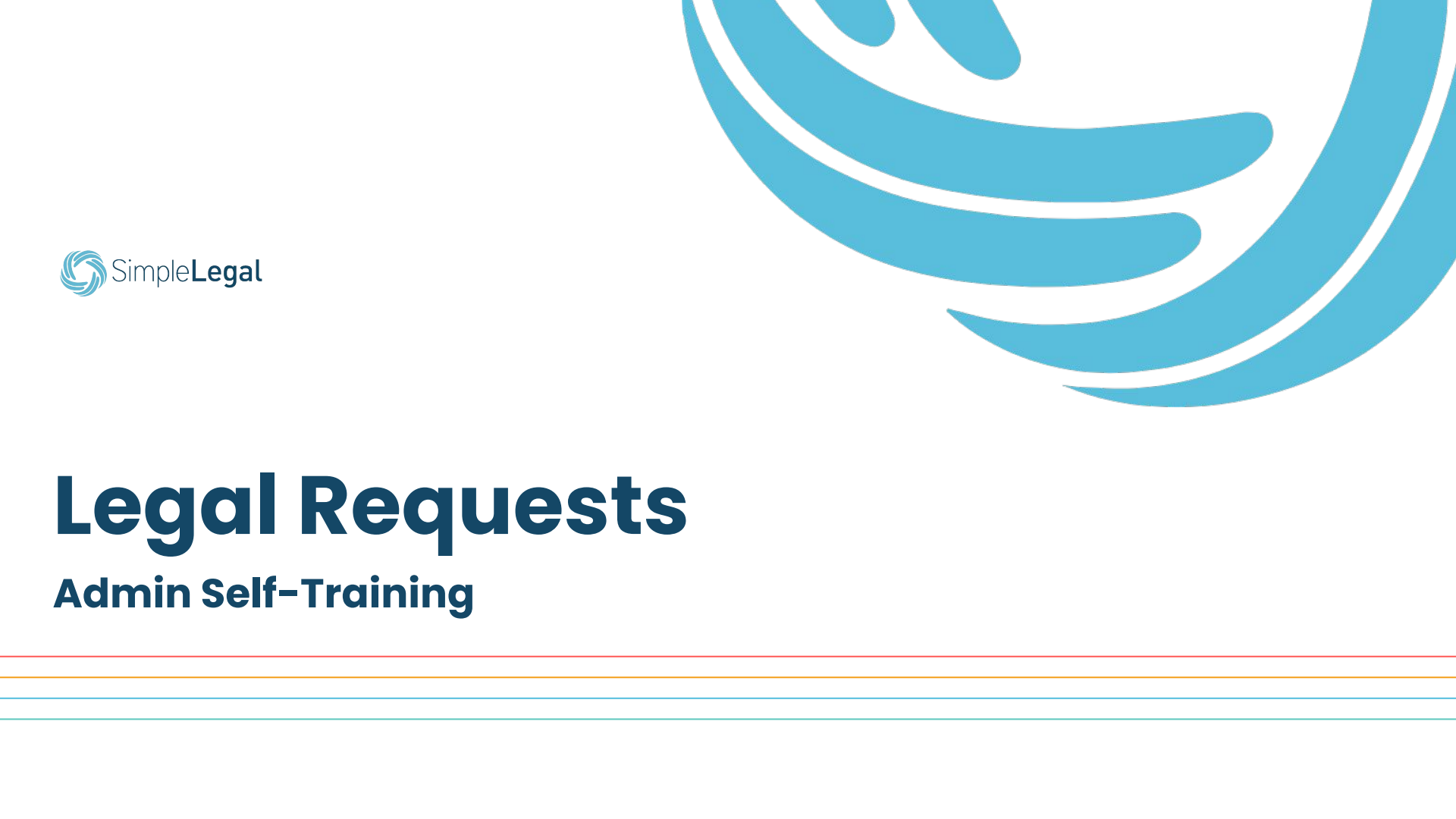




# Legal Requests

## 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.

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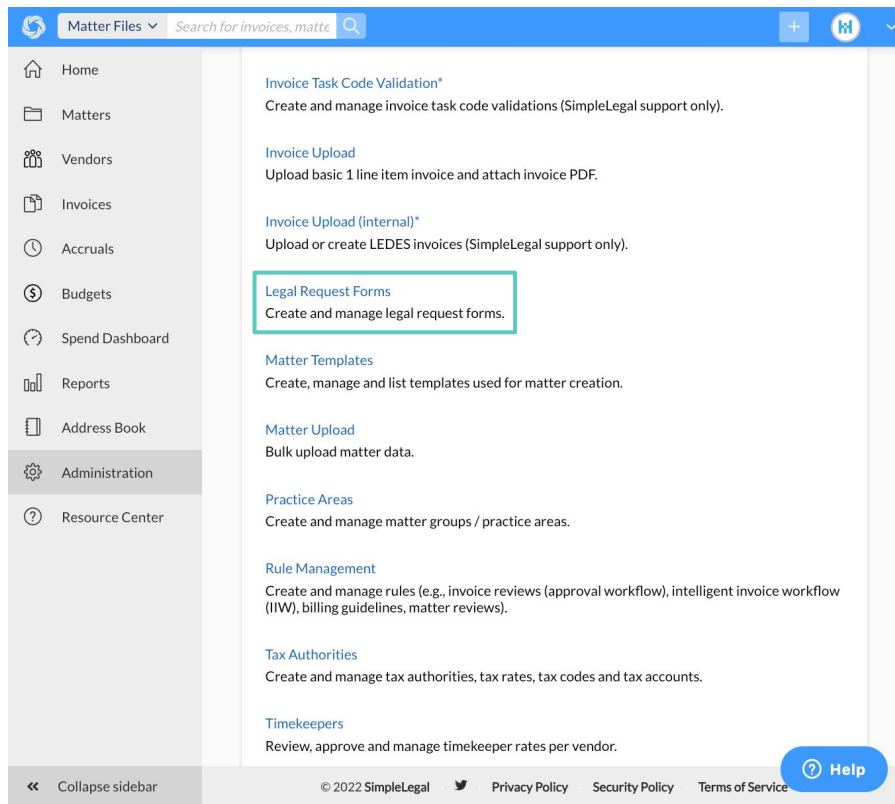
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# Step 1

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.

The screenshot shows the 'Legal Request Forms' management page in the SimpleLegal application. The interface includes a sidebar with navigation icons, a top header with a search bar and user profile, and a main content area with a table of forms. A green 'New Form' button is located in the top right corner of the main content area. The table lists various legal request forms with columns for Name, Last Modified, Requests count, Most recent request date, and Status. The status column shows 'published' or 'archived' for each form. A pagination bar at the bottom of the table shows 'First', '<', '1', '>', and 'Last'.

Name	Last Modified	Requests count	Most recent request date	Status
Employment Issue	05/08/2020	1	06/10/2020	published
General Contracts/Agreements	05/08/2020	1	11/08/2021	published
NDA Form	05/08/2020	----	----	archived
New IP Request	11/07/2018	4	02/25/2019	published
New Litigation Request	12/16/2020	6	09/28/2020	archived
New Litigation Request	12/16/2020	----	----	published
New Visa/Immigration Request	11/07/2018	5	02/26/2019	published
Non-Disclosure Agreement Request	05/08/2020	----	----	published

# 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.

**Select Template**

Filter...

☐ Show description

**Basic**

- ★ Commercial Contract
- ★ Default Template (Default)
- ★ Employment Matters
- ★ IP & Product Matters Template
- ★ Litigated CLM
- ★ Litigation
- ★ M&A Transaction
- ★ Patent Matters Template
- ★ Public Policy Matters Template
- ★ Subpoena Tracking
- ★ Visa / Immigration

**Select Templates**

Select templates used to create the matters made from this Legal Request.

**Basic**

**Matter Attributes**

General	
Matter Name*	
Matter Description	
Practice Area	None
Dates Worked	System Generated
Hours	System Generated
Client Matter ID	System Generated
Entity	None
Accruals Enabled	Yes

**Configure Request Form**

All templates will be available for the Legal Request Form.

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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.

SimpleLegal Matter Files Search for invoices, matters, vendors...

## Add Form

Return to Legal Request Forms Status: Draft

Form Name  
Form Name

Form Description  
Description

Notify Admins  
Select...

### Matter Templates

Choose Preferred Template(s)

All templates are available for this form

### Form Items

Attribute	Input Type	Label	Helper Text	Required	Visible
Matter Name	Text	Request Name	Helper Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>
None	Text	Input Label	Helper Text	<input type="checkbox"/>	<input checked="" type="checkbox"/>

+ Add Item

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# 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.

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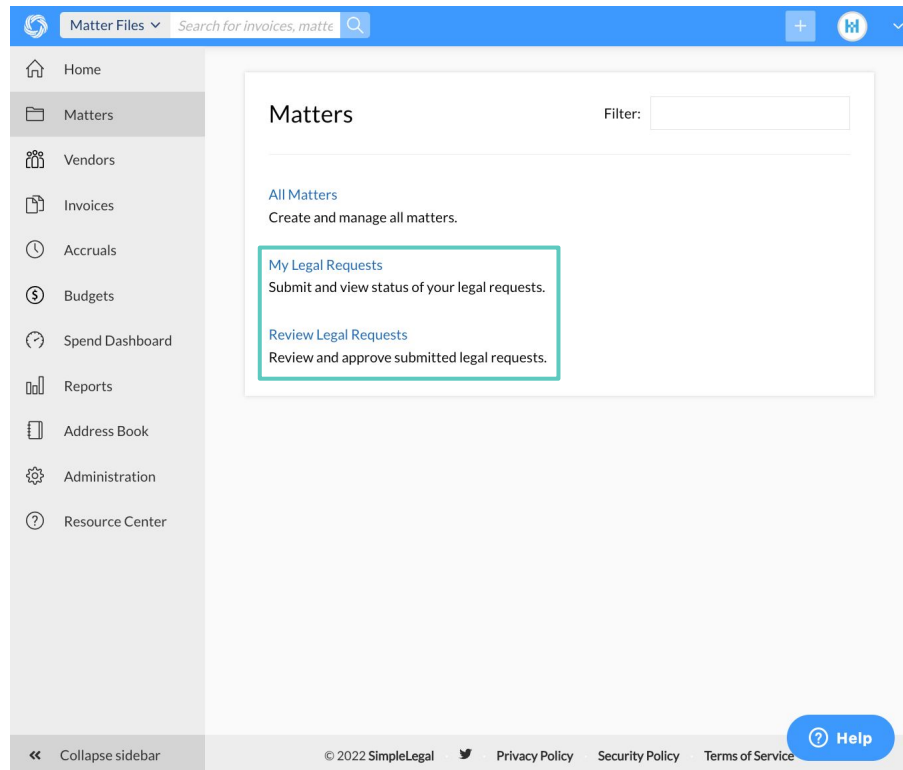
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# Submit, review, and approve forms

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.

SimpleLegal

Matter Files Search for invoices, matters, vendors...

Legal Requests

New Request

All Pending Approved Rejected

Showing 1 to 1 of 1 request View: 10 25 50 100

Search: Start typing to search

Name	Date Received	Reviewed by	Legal Request Status	Matter Status	Client Matter ID	Status Last Updated
Contract for Distribution with Kirkland & Ellis LLP	11/08/2021	Alaina Lui	Approved	Draft	satum-464	11/08/2021

First < 1 > Last

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Help

# 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.

SimpleLegal Matter Files Search for invoices, matters, vendors...

### Review Legal Requests

All Pending Approved Rejected

Showing 1 to 19 of 19 requests | View: 10 25 50 100 Search: Start typing to search

Name	Date Received	Last Modified	Requested by	Type	Reviewed by	Legal Request Status	
123 IP	02/25/2019	04/15/2019	Katelyn Dudley	New IP Request	Karen Moor	Rejected	--
Antitrust Research	02/25/2019	06/21/2019	Katelyn Dudley	New Litigation Request	Karen Moor	Rejected	--
City of MV vs. M. Jones	11/07/2018	11/13/2018	Gail Tsujita	New Litigation Request	Damian Williams	Rejected	--
Contract for Distribution with Kirkland & Ellis LLP	11/15/2021	11/15/2021	Alaina Lui	General Contracts/Agreements	Alaina Lui	Approved	1:
Contract for Distribution with Kirkland & Ellis LLP	11/11/2021	11/11/2021	Alaina Lui	General Contracts/Agreements	Alaina Lui	Approved	1:
General Guidance for Gandhi vs Kinsey Matter	06/10/2020	07/14/2020	Taz Gandhi	Employment Issue	David Moran	Approved	0:

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# 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.

The screenshot displays the SimpleLegal web application. A 'Legal Request Details' modal is open, showing the following information:

Form Name	New Litigation Request
Form Description	-----
Request Name	HR Issue
Description	Termination
Estimated Lost Revenue	123000, USD
Plaintiff	Employee
Defendant	Corporation
Status	Received
Reviewer Comments	<input type="text"/>

At the bottom of the modal are two buttons: 'Reject' and 'Create Matter'.

In the background, a 'Review' table is visible with columns for 'Name' and 'Status'. One row is partially visible with 'HR Issue' in the Name column and 'Rejected' in the Status column. The footer of the application includes the SimpleLegal logo, copyright notice (© 2022 SimpleLegal), and links to Privacy Policy, Security Policy, and Terms of Service. A 'Help' button is located in the bottom right corner.

# 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](mailto:success@simplelegal.com), we're happy to help!