

MatterSphere

Document Search Simplified

Course Description

Use Document Searching within MatterSphere to quickly find documents

Suitable for all MatterSphere users of any level.

Learning Outcomes

By the end of the course, attendees will be able to:

- Search for documents via document search tool
- Filter searches to reduce results
- Sort/order documents to enhance results

Course Duration

The course should last approximately 1 hour.

Prior Knowledge

- **Essential knowledge of:** MatterSphere

Course Content

- Document Search
 - By ID
 - By Search Types
- Search Filters
 - By Document Types
 - Created by
 - Wallets
- Sorting Results
 - Sorting columns
- By Client & Contact
 - Search for documents on Client records
 - Search for documents on Contact records

Course Delivery Format

The session will be delivered in person by a trainer(s).

Maximum dependant on room size if demonstration only. A maximum of 6 if classroom style.

The format of the training delivery will be classroom workshop or demonstration led for the duration of the course. (Dependent upon Client facilities)