

MatterSphere V7.2 - Document Links

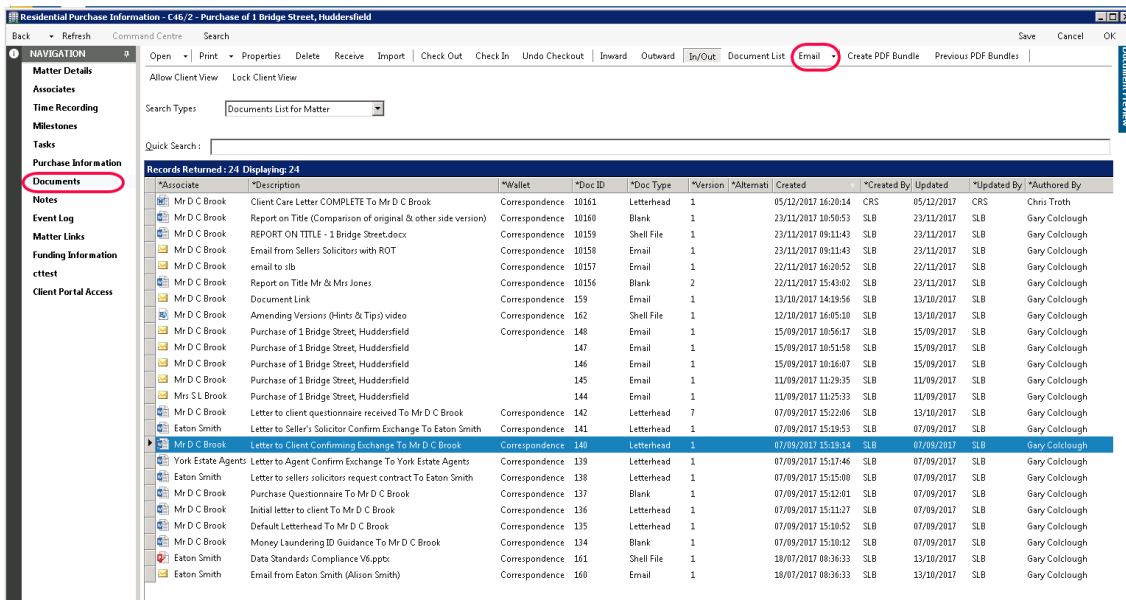
MatterSphere enables you to internally email links to documents to one or more people.

- Anyone accessing the document will be sure to have the most recent version.
- No document attachments cluttering inboxes
- Amends are made to one document only not several

Adding a Document Link

With the Documents tab open on the matter containing the document you wish to send a link for, select the document once to highlight

☞ Click on **Email**



Residential Purchase Information - C46/2 - Purchase of 1 Bridge Street, Huddersfield

Back Refresh Command Centre Search

Open Print Properties Delete Receive Import Check Out Check In Undo Check Out Inward Outward In/Out Document List **Email** Create PDF Bundle Previous PDF Bundles Save Cancel OK

Matter Details
Associates
Time Recording
Milestones
Tasks
Purchase Information
Documents
Notes
Event Log
Matter Links
Funding Information
Client Portal Access

Allow Client View Lock Client View

Search Types: Documents List for Matter

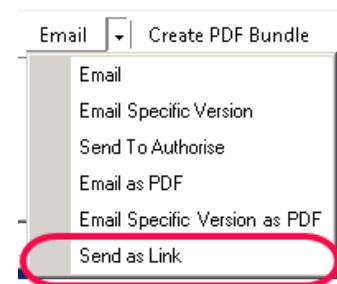
Quick Search:

Records Returned: 24 Displaying: 24

*Associate	*Description	*Wallet	*DocID	*Doc Type	*Version	*Alternat	Created	*Created By	Updated	*Updated By	*Authored By
Mr D C Brook	Client Care Letter COMPLETE To Mr D C Brook	Correspondence	10161	Letterhead	1		05/12/2017 16:20:14	CRS	05/12/2017	CRS	Chris Troth
Mr D C Brook	Report on Title (Comparison of original & other side version)	Correspondence	10160	Blank	1		23/11/2017 10:58:53	SLB	23/11/2017	SLB	Gary Colclough
Mr D C Brook	REPORT ON TITLE - 1 Bridge Street.docx	Correspondence	10159	Shell File	1		23/11/2017 09:11:43	SLB	23/11/2017	SLB	Gary Colclough
Mr D C Brook	Email from Sellers Solicitors with ROT	Correspondence	10158	Email	1		23/11/2017 09:11:43	SLB	23/11/2017	SLB	Gary Colclough
Mr D C Brook	email to slb	Correspondence	10157	Email	1		22/11/2017 16:20:52	SLB	22/11/2017	SLB	Gary Colclough
Mr D C Brook	Report on Title Mr & Mrs Jones	Correspondence	10156	Blank	2		22/11/2017 15:43:02	SLB	23/11/2017	SLB	Gary Colclough
Mr D C Brook	Document Link	Correspondence	159	Email	1		13/10/2017 14:19:56	SLB	13/10/2017	SLB	Gary Colclough
Mr D C Brook	Amending Versions (Hints & Tips) video	Correspondence	162	Shell File	1		12/10/2017 16:05:10	SLB	13/10/2017	SLB	Gary Colclough
Mr D C Brook	Purchase of 1 Bridge Street, Huddersfield	Correspondence	148	Email	1		15/09/2017 10:56:17	SLB	15/09/2017	SLB	Gary Colclough
Mr D C Brook	Purchase of 1 Bridge Street, Huddersfield	Correspondence	147	Email	1		15/09/2017 10:51:58	SLB	15/09/2017	SLB	Gary Colclough
Mr D C Brook	Purchase of 1 Bridge Street, Huddersfield	Correspondence	146	Email	1		15/09/2017 10:16:07	SLB	15/09/2017	SLB	Gary Colclough
Mr D C Brook	Purchase of 1 Bridge Street, Huddersfield	Correspondence	145	Email	1		11/09/2017 11:29:35	SLB	11/09/2017	SLB	Gary Colclough
Mr D C Brook	Purchase of 1 Bridge Street, Huddersfield	Correspondence	144	Email	1		11/09/2017 11:25:33	SLB	11/09/2017	SLB	Gary Colclough
Mr D C Brook	Letter to client questionnaire received To Mr D C Brook	Correspondence	142	Letterhead	7		07/09/2017 15:22:06	SLB	13/10/2017	SLB	Gary Colclough
Eaton Smith	Letter to Seller's Solicitor Confirm Exchange To Eaton Smith	Correspondence	141	Letterhead	1		07/09/2017 15:19:53	SLB	07/09/2017	SLB	Gary Colclough
Mr D C Brook	Letter to Client Confirming Exchange To Mr D C Brook	Correspondence	140	Letterhead	1		07/09/2017 15:19:14	SLB	07/09/2017	SLB	Gary Colclough
York Estate Agents	Letter to Agent Confirm Exchange To York Estate Agents	Correspondence	139	Letterhead	1		07/09/2017 15:17:46	SLB	07/09/2017	SLB	Gary Colclough
Eaton Smith	Letter to sellers solicitors request contract To Eaton Smith	Correspondence	138	Letterhead	1		07/09/2017 15:15:00	SLB	07/09/2017	SLB	Gary Colclough
Mr D C Brook	Purchase Questionnaire To Mr D C Brook	Correspondence	137	Blank	1		07/09/2017 15:12:01	SLB	07/09/2017	SLB	Gary Colclough
Mr D C Brook	Initial letter to client To Mr D C Brook	Correspondence	136	Letterhead	1		07/09/2017 15:11:27	SLB	07/09/2017	SLB	Gary Colclough
Mr D C Brook	Default Letterhead To Mr D C Brook	Correspondence	135	Letterhead	1		07/09/2017 15:10:52	SLB	07/09/2017	SLB	Gary Colclough
Mr D C Brook	Money Laundering ID Guidance To Mr D C Brook	Correspondence	134	Blank	1		07/09/2017 15:10:12	SLB	07/09/2017	SLB	Gary Colclough
Eaton Smith	Data Standards Compliance V6.gpbx	Correspondence	161	Shell File	1		18/07/2017 09:36:33	SLB	13/10/2017	SLB	Gary Colclough
Eaton Smith	Email from Eaton Smith (Alison Smith)	Correspondence	160	Email	1		18/07/2017 09:36:33	SLB	13/10/2017	SLB	Gary Colclough

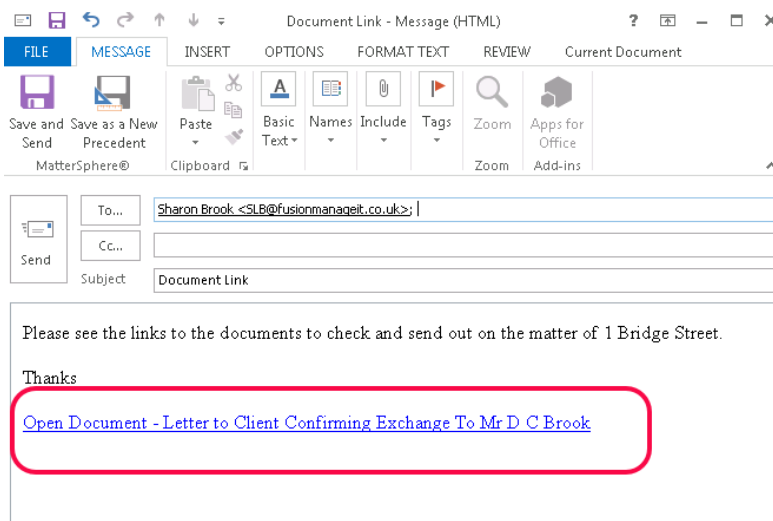
☞ From the Email drop down select **Send as Link**

You will now have an email appear with the link already on it.



Email Create PDF Bundle

- Email
- Email Specific Version
- Send To Authorise
- Email as PDF
- Email Specific Version as PDF
- Send as Link**



Document Link - Message (HTML)

FILE MESSAGE INSERT OPTIONS FORMAT TEXT REVIEW Current Document

Save and Send Save as a New Send Precedent

MatterSphere@ Clipboard

To... Sharon Brook <SLB@fusionmanageit.co.uk> |

Cc...

Send Subject Document Link

Please see the links to the documents to check and send out on the matter of 1 Bridge Street.

Thanks

[Open Document - Letter to Client Confirming Exchange To Mr D C Brook](#)

You can amend the text and subject as you like and then select who you wish to send to in the usual way.

🔔 **NB: The recipient of this emailed link must be on your internal server. External people will not be able to use the link for security reasons.**

Adding Multiple Document Links

You can add links to several documents within the same matter.

☞ Select your first one as before (highlighted)

☞ Hold the **Ctrl Key** down on your keyboard while using your mouse to select the further documents you wish to link to

Mr D C Brook	Purchase of 1 Bridge Street, Huddersfield		144	errid
Mr D C Brook	Letter to client questionnaire received To Mr D C Brook	Correspondence	142	Lette
Eaton Smith	Letter to Seller's Solicitor Confirm Exchange To Eaton Smith	Correspondence	141	Lette
Mr D C Brook	Letter to Client Confirming Exchange To Mr D C Brook	Correspondence	140	Lette
York Estate Agents	Letter to Agent Confirm Exchange To York Estate Agents	Correspondence	139	Lette
Eaton Smith	Letter to sellers solicitors request contract To Eaton Smith	Correspondence	138	Lette
Mr D C Brook	Purchase Questionnaire To Mr D C Brook	Correspondence	137	Blank
Mr D C Brook	Initial letter to client To Mr D C Brook	Correspondence	136	Lette
Mr D C Brook	Default Letterhead To Mr D C Brook	Correspondence	135	Lette
Mr D C Brook	Money Laundering ID Guidance To Mr D C Brook	Correspondence	134	Blank
Eaton Smith	Data Standards Compliance V6 ext	Correspondence	161	Shell

☞ Repeat the steps to **Send as Link**

Your email will now contain links to all the selected documents.

Sending Document Links

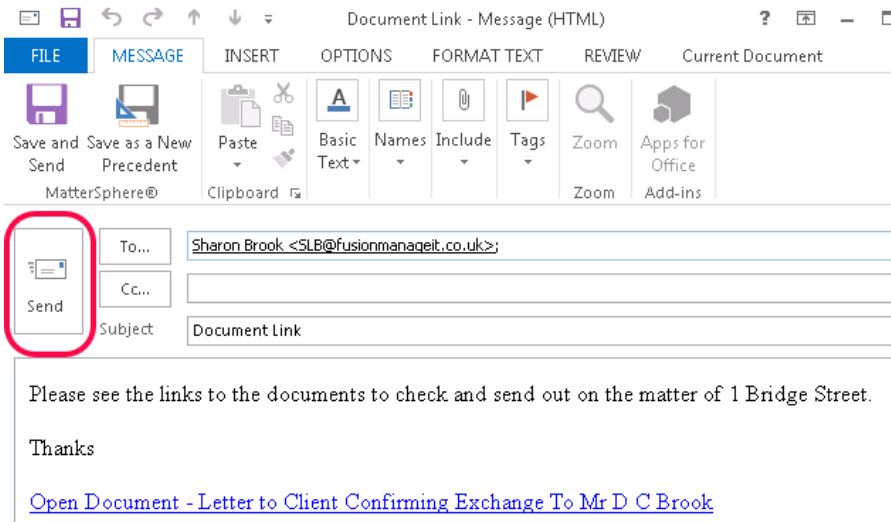
Now your links are in your email and you have chosen your internal recipient you can send as follows:

Internal – not saving email to matter

It may not always be necessary to save an internal email to the matter if it is just for admin

☞ Click on the **Send** button on the email

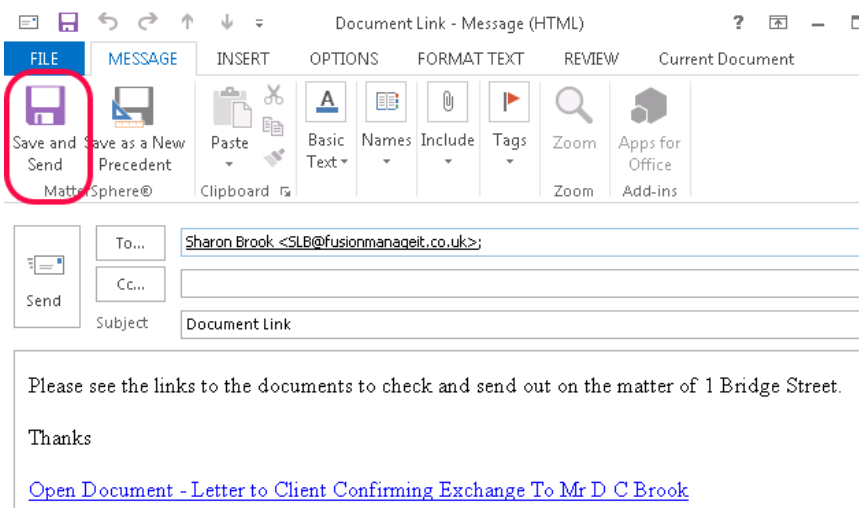
You will not be prompted to save to the matter.



Internal – save email to matter

If the content of the email requires to be saved to the matter for client record

☞ **Select *Save and Send***



Follow all the necessary steps to save the document to MatterSphere in the usual way. Ensure you enter an appropriate document description.

