Sorting documents

Document Organisation · https://ebriefready.legalready.ai/knowledge/how-to-sort-documents/

eBrief Ready lets you control document sorting at two levels: across the entire matter and inside each folder. These settings work together, for instance, you can keep the matter sorted by date while a specific folder is sorted by document name.

Sorting options

- **Manual / User-defined** (default) — you control the order by dragging and dropping documents using the handlebars (three lines icon)
- **Field: Date** — documents are ordered automatically by date
- **Field: Document name** — documents are ordered automatically by name

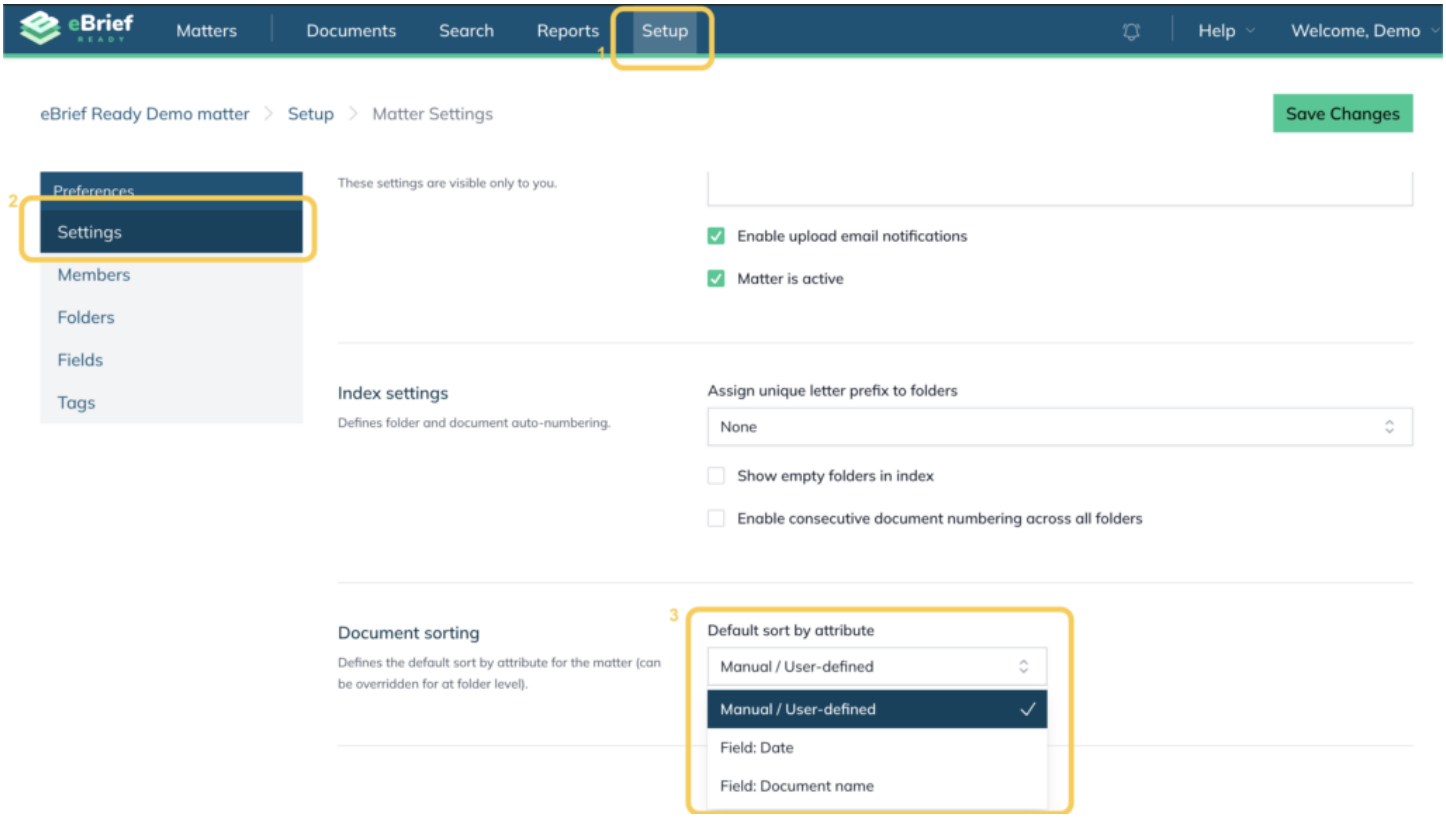
Sorting at the matter level

Matter level sorting sets the default order for documents across the entire matter.

1. Open the matter and click **Setup**
2. Select **Settings** from the left panel
3. Under **Document sorting**, select your preferred option from the **Default sort by attribute** dropdown

Note: **For Field: Date** or **Field: Document name**, tick **Sort** in reverse order if you want to reverse the direction.

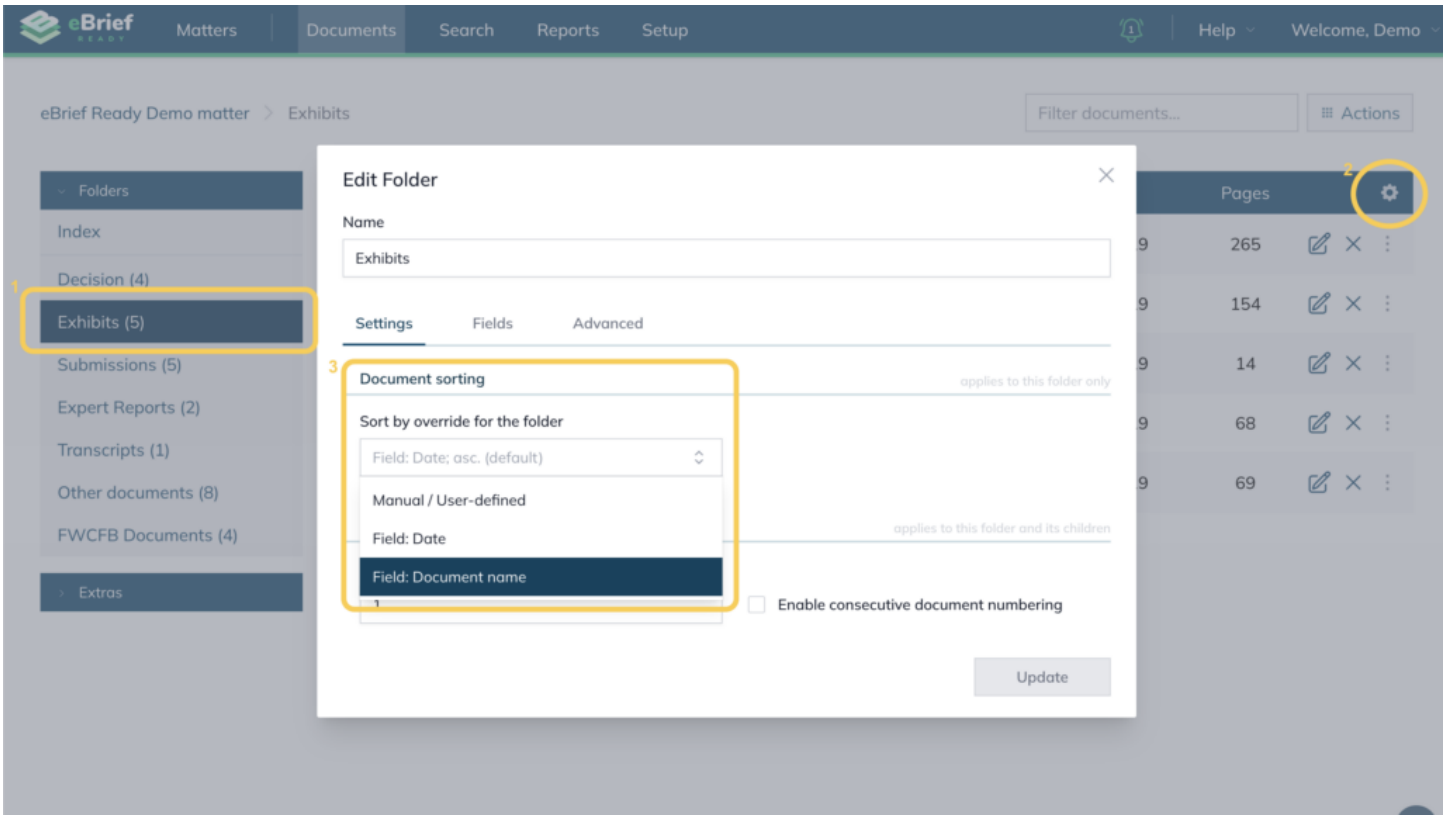
4. Click **Save Changes**



Sorting within individual folders

Individual folders can have their own sort order, overriding the matter level setting.

1. In the **Setup** tab, click **Folders** in the left panel
2. Click the **pencil icon** to the right of the folder - the **Edit Folder** window appears
3. Under **Document sorting**, select your preferred option from the **Sort** all documents automatically by dropdown
4. Click **Update**



Note: You can also edit a folder's settings without going to the Setup tab. In the Document tab, click the folder in the left panel and then click the Cog to access the Edit Folder window.

When to Use Each Sorting Option

Manual / User-defined

Use this option when you want to control the exact order of documents within a folder or matter.

Field: Date

Best used when reviewing documents chronologically, such as correspondence, filings, or document production.

Field: Document name

Helpful when documents follow a structured naming convention, such as numbered exhibits or standardised document titles.

For further information or assistance, please do not hesitate to reach out to our dedicated Support Team via support@legalready.ai or +61 3 9020 4456.