Create a matter

Matter Management · https://ebriefready.legalready.ai/knowledge/matter-creation/

A matter is the central workspace in eBrief Ready where you upload, organise, and share documents for a case or project. Creating a matter is the first step before adding documents, building court books, or sharing with other parties.

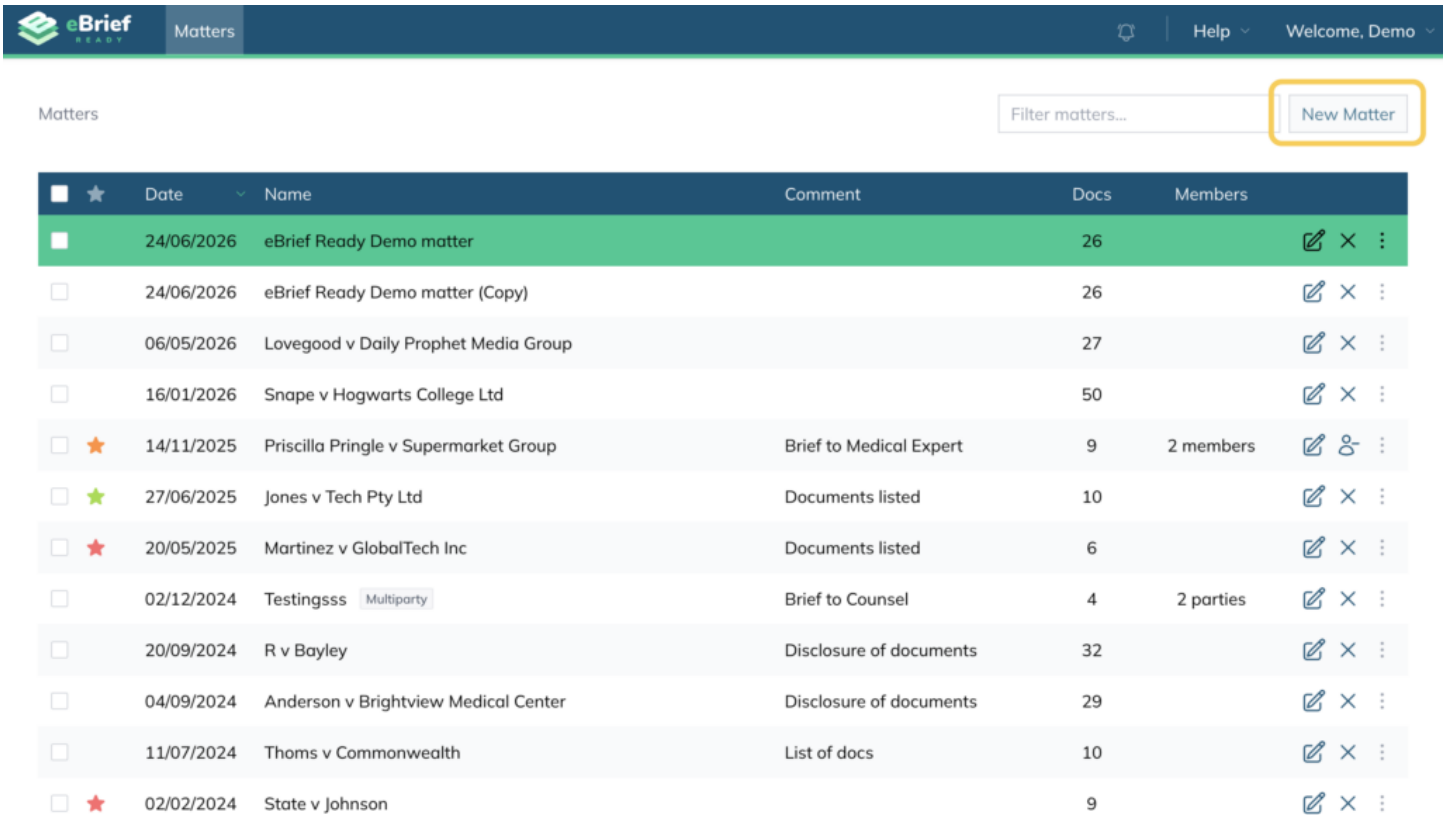
Each matter has its own folder structure, member permissions, and settings. You can create as many matters as needed and manage them all from the Matters view.

Prerequisites

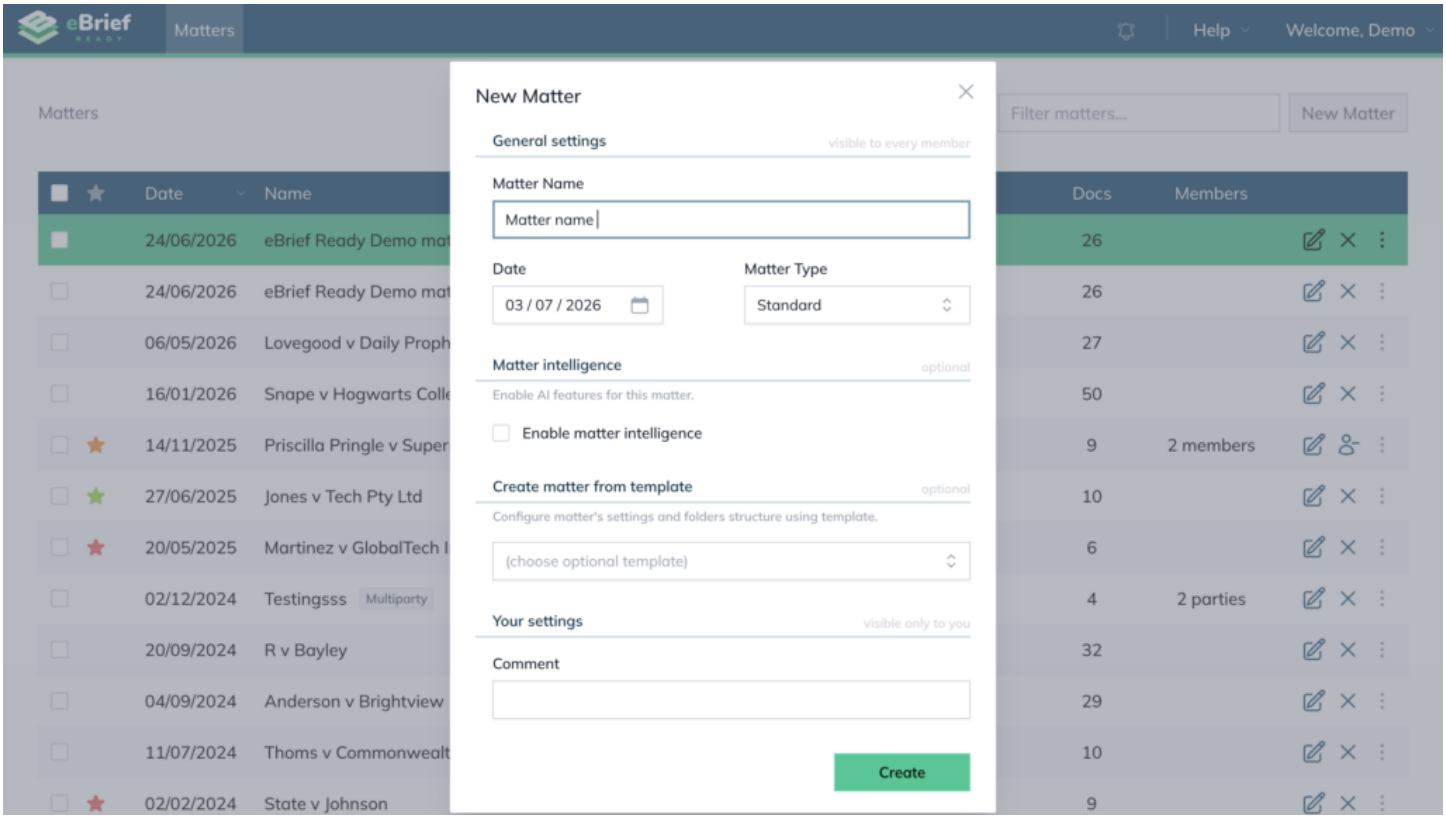
- You must have an active eBrief Ready account (Pro, Law Firm, or Law Firm Plus).
- Limited account holders can create a matter but cannot upload documents until the matter is associated with a paying subscriber.

Creating a matter

1. Click **New Matter** in the top right corner of the Matters screen



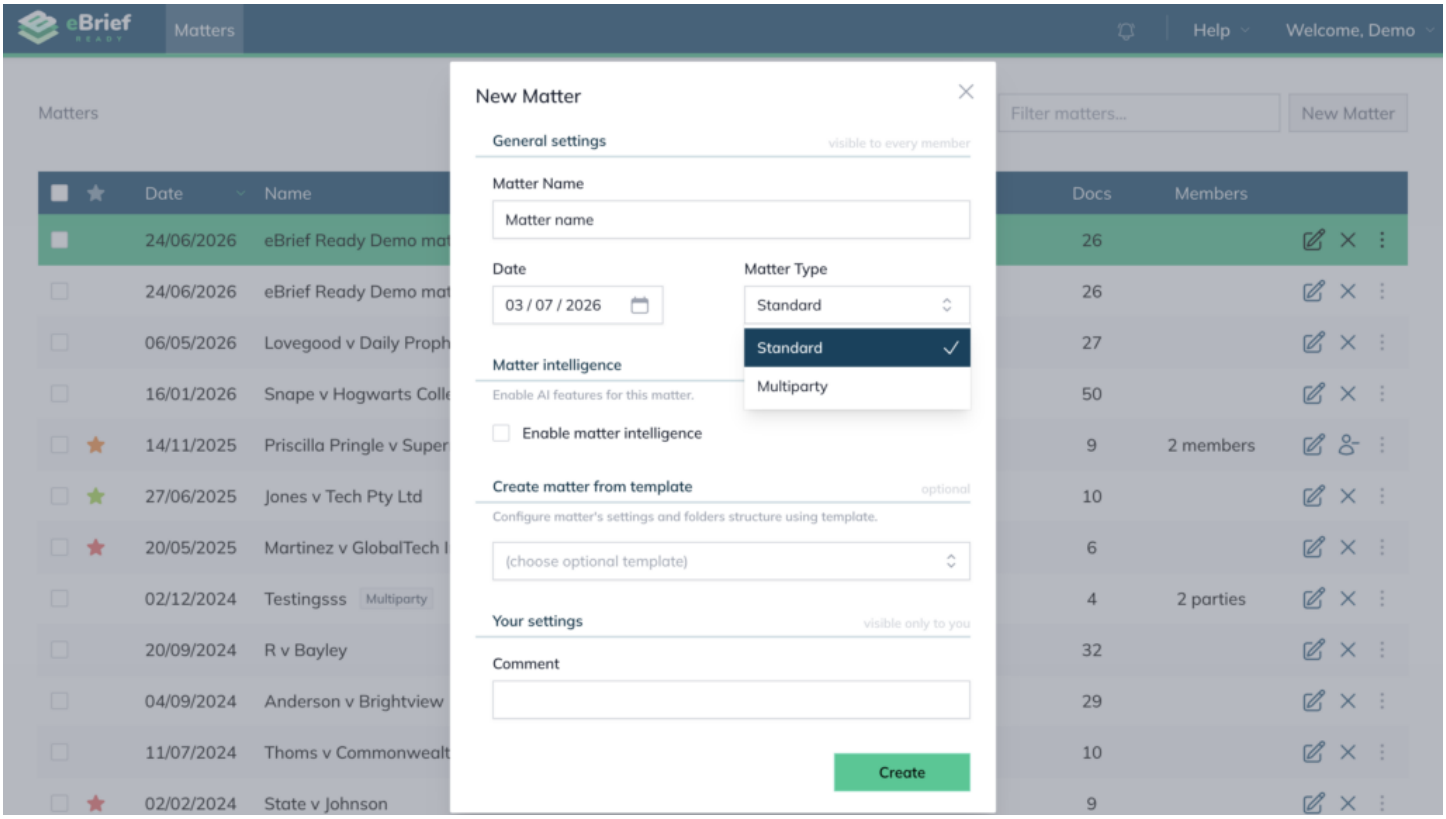
2. Enter a **Matter Name** and, optionally, select a **Date**



3. Select the Matter Type. Two options are available:

1. **Standard** — the default option for a single-party matter. Suitable for most use cases
2. **Multiparty** — allows multiple parties to work on the matter independently, each with their own private workspace and a shared area. Ideal for matters involving opposing parties, mediators, or the court

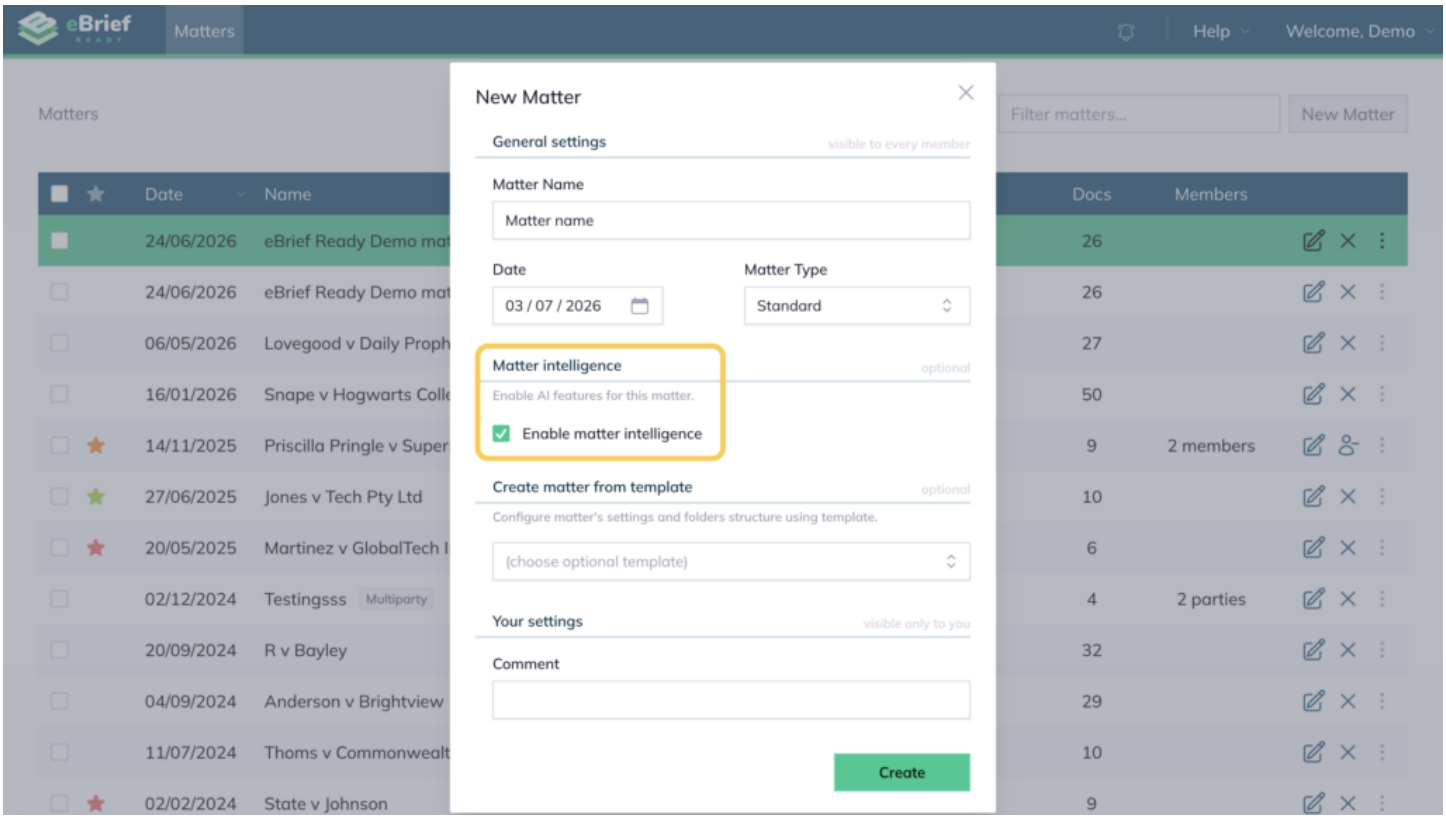
Note: Multiparty matters have additional setup steps. See **How to create a Multiparty matter** for full guidance.



4. (Optional) tick **Enable Matter Intelligence** to activate AI-powered features for this matter, including Smart Classification, Chronology Builder, and AI Analysis.

This setting can also be changed after the matter is created.

Note: Matter Intelligence requires AI features to be enabled at the account level first. See **How to enable AI features** for setup instructions.



5. (Optional) Add a **Template**

Templates store settings, folders, fields and tags to save time.

6. (Optional) Add a **Comment**

This is a private note visible only to you and will not be seen by other members of the matter.

7. Click **Create** - the matter will appear in your **Matters** view

Configuring a matter (optional)

Once created, you can further configure the matter before adding documents or sharing with others.

Set up folders

Navigate to **Setup → Folders** to create your folder structure. You can also apply a prebuilt matter template if your organisation has one saved.

Set a matter number

If you have Admin rights, you can enable a matter number field upon matter creation.

Navigate to **Organsational Admin → Settings → Matter Attributes** to enable a matter number or reference ID.

Update your comment

Navigate to **Setup → Matter Settings → Your Settings** to add or update a comment. Reminder, comments remain private and are only visible to you.

Organisation and admin considerations

- **Law Firm** and **Law Firm Plus** subscribers can have an **Administrator** who manages matters on behalf of the organisation/firm, including transferring or deleting matters
- If you belong to an organisation/firm, your administrator may have set default folder templates that apply automatically when a new matter is created
- Administrators can transfer matters between users. Learn more about **Organisation Administration.**

Editing or deactivating a matter

Edit matter settings

To edit a matter after creation, click the **Edit** icon next to the matter name in the **Matters view**. You can update the name, date, matter type, and Matter Intelligence setting.

Make a matter inactive

To remove a matter from your **Active Matters view** without deleting it, open the matter, go to **Setup → Matter Settings,** and uncheck **Matter is active**.

Inactive matters can be reactivated at any time.

Delete a matter

Only the matter owner or an organisation administrator can delete a matter.

Deleted matters are moved to the **Recycle Bin** and permanently removed after the retention period set by your administrator.

Embedded media: https://player.vimeo.com/video/1042763414?h=ca5ee12904&dnt=1&app_id=122963

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.