



Physical Records Management

28th August 2023

Physical Record Management (PRM)

Contents

Understanding PRM and setting up safe custody types, boxes, and locations	4
What is Physical Record Management (PRM)?	4
How do I turn on Role access for PRM?	4
(a) Safe Custody Types	5
Creating a Safe Custody Type	5
Editing a Safe Custody Type	5
Deleting a Safe Custody Type	6
(b) Boxes	7
Creating a Box	7
Editing a Box	8
Deleting a Box	8
(c) Location	9
Creating a Location	9
Editing a Location	10
Deleting a Location	10
Creating and managing Matter Folders	11
(a) Creating a Matter Folder	11
(b) Editing a Matter Folder	12
(c) Deleting a Matter Folder	13
(d) Checking Out a Matter Folder	13
(e) Checking In a Matter Folder	15
(f) Transferring a checked out Matter Folder to another User	16
(g) Reporting a Matter Folder as lost	17
(h) View a Matter Folder's attachments, information, and history	18
(i) Transfer a Matter Folder to a different Matter	19
Creating and managing Safe Custody items	20
(a) Creating a Safe Custody item	20
(b) Editing a Safe Custody item	21
(c) Deleting a Safe Custody item	22
(d) Checking Out a Safe Custody item	23
(e) Checking In a Safe Custody item	24
(f) Transferring a checked out Safe Custody item to another User	25
(g) Reporting a Safe Custody item as lost	26
(h) Returning a Safe Custody item to Client	27
(i) View a Safe Custody item's attachments, information, and history	28
(j) Transfer a Matter Folder to a different Matter	29

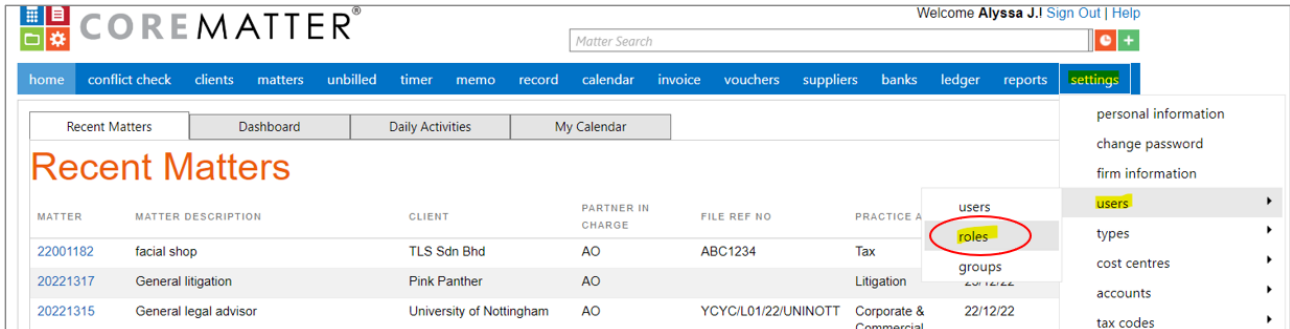
FAQs on the Physical Records Management module 30

What is Physical Record Management (PRM)?

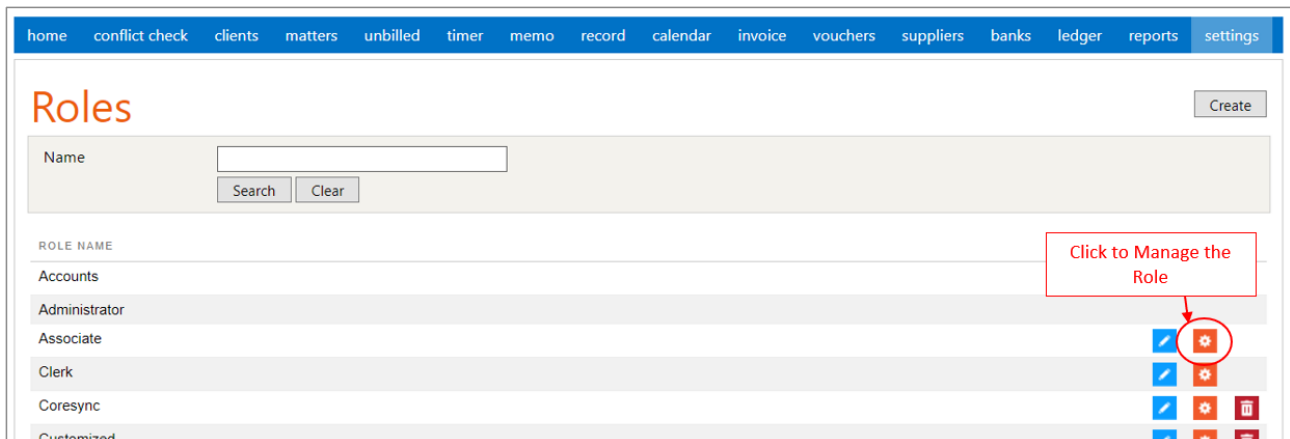
The PRM module is where firms can track and manage all Matter Folders and Safe Custody types (documents held on behalf of Client) within CoreMatter.

How do I turn on Role access for PRM?

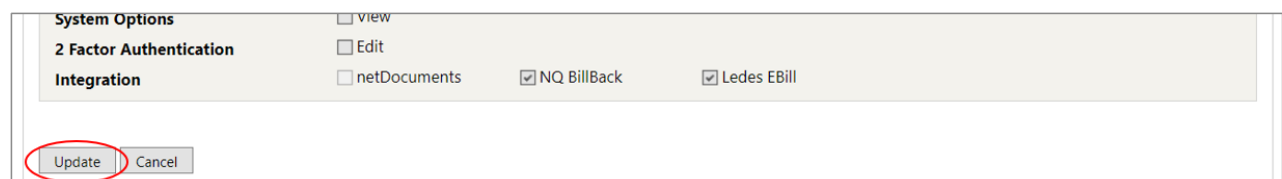
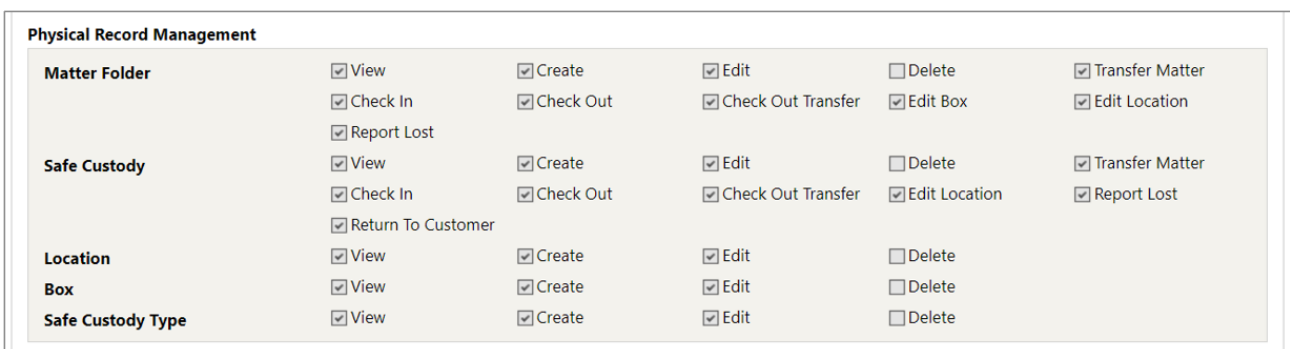
1. Go to **Settings > Users > Roles**.



2. Click on the **orange gear button** to manage the access for that Role.



3. Scroll down to the **Physical Record Management** section and assign access.

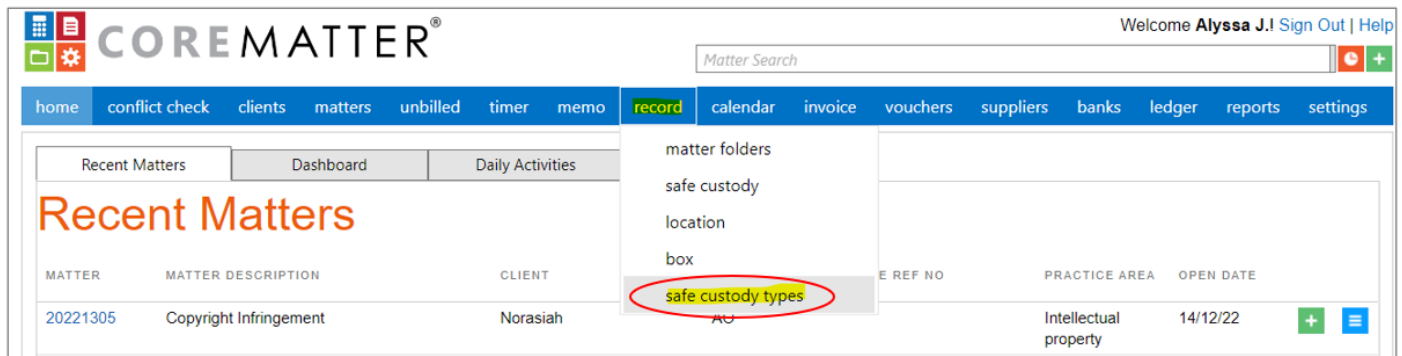


4. When done, scroll all the way down and **click the 'Update' button**.

(a) Safe Custody Types

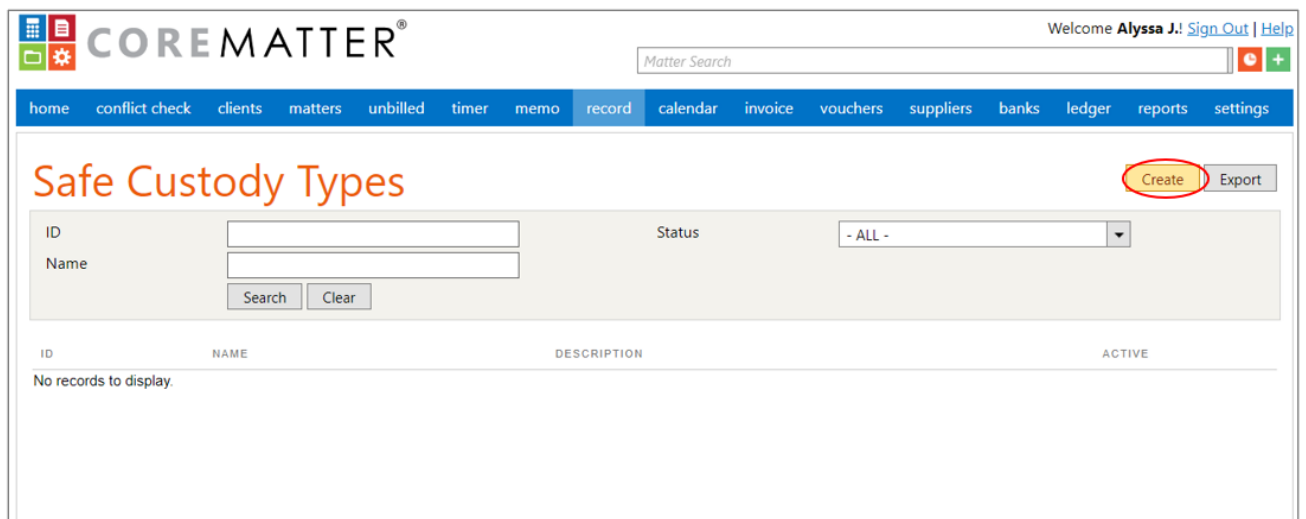
Safe Custody Types are where you define the types of documents you store on behalf of your Clients.

You can find all Safe Custody Types under **Record > Safe Custody Types**.



Creating a Safe Custody Type

1. Click on the 'Create' button.



2. Put in an ID for the document type, then write the document type under 'Name'. Click 'Submit' to create the Safe Custody Type.

Editing a Safe Custody Type

Click on the blue pencil icon to open the 'Edit Safe Custody Type' pop-up.

You can make amendments to the ID, Name, Description, or set an item to Active/Inactive.

ID	NAME	DESCRIPTION	ACTIVE		
OC01	Original Certificate of Land Deed		☒		
P01	Power of Attorney		☒		
W01	Will		☒		

Deleting a Safe Custody Type

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ID	NAME	DESCRIPTION	ACTIVE		
OC01	Original Certificate of Land Deed		☒		
P01	Power of Attorney		☒		
W01	Will		☒		

Click on the red bin button to delete a Safe Custody Type. You cannot delete a Safe Custody Type that is currently in use.

(b) Boxes

Boxes are where you list down the storage boxes that contain your Matter Folders.

You can find all Boxes under **Record > Box**.

The screenshot shows the COREMATTER dashboard. The top navigation bar includes 'home', 'conflict check', 'clients', 'matters', 'unbilled', 'timer', 'memo', 'record', 'calendar', 'invoice', 'vouchers', 'suppliers', 'banks', 'ledger', 'reports', and 'settings'. The 'record' menu is open, showing options: 'matter folders', 'safe custody', 'location', 'box' (highlighted with a red circle), and 'safe custody types'. Below the menu, the 'Recent Matters' table is visible, listing various legal matters with columns for Matter, Matter Description, Client, and others.

Creating a Box

1. Click on the 'Create' button.

The screenshot shows the 'Boxes' page in the COREMATTER system. The top navigation bar is the same as the previous screenshot. The 'Boxes' page has a 'Create' button (highlighted with a red circle) and an 'Export' button. Below the buttons, there are input fields for 'Reference No.' and 'Supplier' (a dropdown menu), and 'Search' and 'Clear' buttons. The main area shows a table with columns 'REFERENCE NO.', 'SUPPLIER', and 'NO OF RECORDS', and a message 'No records to display.'

2. Put in the Reference No. for the Box.

- If one of your Suppliers provides storage services for your Box, you can select them from the drop-down list.
- **NOTE:** Suppliers will only drop-down in the list if the 'Box' item is ticked on their profile.

The diagram illustrates the 'Create Box' form and the 'Suppliers' list. The 'Create Box' form has fields for 'Reference No.' (AJO/LIT/001), 'Supplier' (CRM - Crown Records Management), and 'Remarks'. The 'Submit' button is highlighted with a red circle. The 'Suppliers' list shows a dropdown menu with 'CRM' selected. A red arrow points from the 'CRM' dropdown to the 'Suppliers' list. A red box highlights the 'Box' checkbox in the 'Suppliers' list, with a note: 'Tick to show in PRM Supplier drop-down'. The 'Suppliers' list also includes a 'GST Registered' checkbox and a 'Transportation & Logistics / Sup' dropdown menu.

3. Click 'Submit' to create the Box.

Editing a Box

Click on the blue pencil icon to open the 'Edit Box' pop-up.

You can make amendments to the Reference No, Supplier, or Remarks.

[home](#) [conflict check](#) [clients](#) [matters](#) [unbilled](#) [timer](#) [memo](#) [record](#) [calendar](#) [invoice](#) [vouchers](#) [suppliers](#) [banks](#) [ledger](#) [reports](#) [settings](#)

Boxes

CreateExport

Reference No.

Supplier

- ALL -

SearchClear

REFERENCE NO.	SUPPLIER	NO OF RECORDS	
AJO/CONV/001	Crown Records Management	1	
AJO/LIT/001	Crown Records Management	2	

Click to Edit

Deleting a Box

Click on the red bin button to delete a Box. You cannot delete a Box that is currently in use.

[home](#) [conflict check](#) [clients](#) [matters](#) [unbilled](#) [timer](#) [memo](#) [record](#) [calendar](#) [invoice](#) [vouchers](#) [suppliers](#) [banks](#) [ledger](#) [reports](#) [settings](#)

Boxes

CreateExport

Reference No.

Supplier

- ALL -

SearchClear

REFERENCE NO.	SUPPLIER	NO OF RECORDS	
AJO/CONV/001	Crown Records Management	1	
AJO/LIT/001	Crown Records Management	2	
JT/CORP/001		0	 

Click to Delete

(c) Location

Locations are where you list down the places (room, rack/shelf, warehouse, office, etc) where your boxes/records are stored.

You can find all Locations under **Record > Location**.

The screenshot shows the COREMATTER dashboard. The top navigation bar includes 'home', 'conflict check', 'clients', 'matters', 'unbilled', 'timer', 'memo', 'record', 'calendar', 'invoice', 'vouchers', 'suppliers', 'banks', 'ledger', 'reports', and 'settings'. The 'record' menu is open, showing options: 'matter folders', 'safe custody', 'location' (highlighted with a red circle), 'box', and 'safe custody types'. The main content area shows 'Recent Matters' with a table of cases.

MATTER	MATTER DESCRIPTION	CLIENT	REF NO	PRACTICE AREA	OPEN DATE	
22001242	Litigation for so and so	The Alphabet Press	AU	Litigation	04/11/22	+ [Menu]
20221305	Copyright Infringement	Norasiah	AO	Intellectual property	14/12/22	+ [Menu]
20221306	sadsada	Hosanna Pte Ltd	JT	Litigation	14/12/22	+ [Menu]
20221303	Trademark	Messi Sdn Bhd	AO	Corporate & Commercial	14/12/22	+ [Menu]
20221300	Trademark agreement	All England Sports	AO	Intellectual property	14/12/22	+ [Menu]

Creating a Location

1. Click on the 'Create' button.

The screenshot shows the 'Location' form. The top navigation bar is the same as the previous screenshot. The 'record' menu is open, and the 'location' option is selected. The form has fields for 'ID', 'Name', 'Parent Location', 'Type', and 'Status'. The 'Create' button is highlighted with a red circle. Below the form is a table with columns: ID, NAME, PARENT LOCATION, DESCRIPTION, TYPE, and ACTIVE. The table is currently empty, showing 'No records to display.'

2. Put in an ID and the Name of the Location. You can also attach a Parent Location. Mark a Location as 'Internal' if it is your office, or 'External' if it is outside of your office.

The screenshot shows the 'Create Location' modal form. It has fields for 'ID *', 'Name *', 'Parent Location', 'Description', 'Type', and buttons for 'Submit' and 'Cancel'. The 'ID' field contains 'MB-L5-R1', the 'Name' field contains 'Main Branch - Level 5 - Rack 1', and the 'Type' dropdown is set to 'Internal'. The 'Parent Location' dropdown is open, showing options: '- Please Select -', 'Main Branch', and 'Main Branch / Main Branch - Level 5'. A red arrow points to the 'Main Branch / Main Branch - Level 5' option. A red box contains the text: 'Parent Locations can be selected from previously created Locations'.

Editing a Location

Click on the blue pencil icon to open the 'Edit Location' pop-up.

You can make amendments to the ID, Name, Parent Location, Description, or set a Location to 'Active/Inactive'.

NOTE: The Location 'Type' for a Parent Location will be locked once it has a sub-Location tagged to it.

[home](#) [conflict check](#) [clients](#) [matters](#) [unbilled](#) [timer](#) [memo](#) [record](#) [calendar](#) [invoice](#) [vouchers](#) [suppliers](#) [banks](#) [ledger](#) [reports](#) [settings](#)

Location

CreateExport

ID

Type

- ALL -

Name

Status

- ALL -

Parent Location

- Please Select -

Search

Clear

ID	NAME	PARENT LOCATION	DESCRIPTION	TYPE	ACTIVE	
CRMKL	Crown Records Management - KL Branch			External	☒	
CRMKL-V1	Crown Records Management KL - Vault 1	Crown Records Management - KL Branch / Crown Records Management KL - Vault 1		External	☒	 
MB	Main Branch			Internal	☒	

Click to Edit

Deleting a Location

Click on the red bin button to delete a Box. You cannot delete a Location that has a sub-Location tagged to it.

[home](#) [conflict check](#) [clients](#) [matters](#) [unbilled](#) [timer](#) [memo](#) [record](#) [calendar](#) [invoice](#) [vouchers](#) [suppliers](#) [banks](#) [ledger](#) [reports](#) [settings](#)

Location

CreateExport

ID

Type

- ALL -

Name

Status

- ALL -

Parent Location

- Please Select -

Search

Clear

ID	NAME	PARENT LOCATION	DESCRIPTION	TYPE	ACTIVE	
CRMKL	Crown Records Management - KL Branch			External	☒	
CRMKL-V1	Crown Records Management KL - Vault 1	Crown Records Management - KL Branch / Crown Records Management KL - Vault 1		External	☒	 
MB	Main Branch			Internal	☒	

Click to Delete

Creating and managing Matter Folders

Matter Folders are where you list down and manage any folders you have opened for a Matter.

You can find all Matter Folders under **Record > Matter Folders**.

The screenshot shows the COREMATTER dashboard. The top navigation bar includes links for home, conflict check, clients, matters, unbilled, timer, memo, record, calendar, invoice, vouchers, suppliers, banks, ledger, reports, and settings. The 'record' menu is expanded, showing options like safe custody, location, box, and safe custody types. The 'matter folders' option is highlighted with a red circle. Below the navigation bar, there is a 'Recent Matters' section with a table listing matters.

MATTER	MATTER DESCRIPTION	CLIENT	REF NO	PRACTICE AREA	OPEN DATE
22001242	Litigation for so and so	The Alphabet Press	AU	Litigation	04/11/22
20221305	Copyright Infringement	Norasiah	AO	Intellectual property	14/12/22
20221306	sadsada	Hosanna Pte Ltd	JT	Litigation	14/12/22
20221303	Trademark	Messi Sdn Bhd	AO	Corporate & Commercial	14/12/22
20221300	Trademark agreement	All England Sports	AO	Intellectual	14/12/22

(a) Creating a Matter Folder

1. Click on the 'Create' button.

The screenshot shows the 'Matter Folders' form. The 'Create' button is highlighted with a red circle. The form includes fields for Client, Matter, Name, Location, Box, Date, Status, and In / Out. There is a 'Search' button and a 'Clear' button. Below the form, there is a table with columns for DATE, MATTER, VOL, NAME, LOCATION, BOX, STATUS, and IN / OUT. The table currently shows 'No records to display.'

2. **Select the Matter** for this Matter Folder, then key in the **Name of the Folder**.
 - You can also choose to select a Location and Box for this Matter Folder.
 - If needed, type in your Remarks about this Matter Folder and attach up to four (4) attachments.

The screenshot shows the 'Create Matter Folder' form. The 'Submit' button is highlighted with a red circle. The form includes fields for Matter, Date, Name, Location, Box, Remarks, In/Out, Status, and Volume No. There is a section for Attachments with four file upload buttons, each showing 'File Uploaded Successfully'. The bottom of the form has 'Submit' and 'Cancel' buttons.

3. Click 'Submit' to create the Matter Folder. Each new Matter Folder you create for a Matter will be recorded as a new volume.

(b) Editing a Matter Folder

1. Click on the blue pencil icon to open the 'Edit Matter Folder' pop-up.

Matter Folders

Client: - ALL - Date: 10/12/22 to 16/12/22
 Matter: - ALL - Status: - ALL -
 Name: In / Out: - ALL -
 Location: - ALL -
 Box: - ALL -

Search Clear

	DATE	MATTER	VOL.	NAME	LOCATION	BOX	STATUS	IN / OUT	
▶	16/12/22	20221283 East Coast Holdings S/B	1	Volume 1	Main Branch / Main Branch - Level 5	AJO/CONV/001	Running	In	Actions  
▶	16/12/22	20221307 Hydroflask Bhd	2	Matter Folder 2	Main Branch / Main Branch - Level 5 /	AJO/LIT/001	Running	In	Actions  

2. You can make amendments to the Date, Name, Location, Box, Remarks, and add or remove attachments.
 - You can also view the Matter Folder's Check Out Information and History.

Edit Matter Folder

In/Out: **IN**
 Status: **RUNNING**
 Volume No.: **1**

Matter: **20221307 - Hydroflask Bhd | Suit against Montigo Flask on trademark**

Date *: 16/12/22

Name *: File Ref No: 2022/LIT/1307/V1

Location: Main Branch / Main Branch - Level 5 / Iv

Box: AJO/LIT/001

Remarks:

^ Attachments

Drop File Here SELECT

File Deleted Successfully

document 3.jpeg  document 2.jpeg  document 1.jpeg 

- Additionally, you can also **edit multiple Matter Folders** at the same time by selecting several Matter Folders, then click **'Bulk Actions'**, followed by 'Edit Box' or 'Edit Location'.

Matter Folders

Client: - ALL - Date: 16/12/22 to 22
 Matter: - ALL - Status: - ALL -
 Name: In / Out: - ALL -
 Location: - ALL -
 Box: - ALL -

Search Clear

Select the Matter Folders

Select whether to Edit Box or Location

	DATE	MATTER	VOL.	NAME	LOCATION	BOX	STATUS	IN / OUT	
☒	16/12/22	20221283 East Coast Holdings S/B	1	Volume 1	Main Branch	AJO/CONV/001	Running	Out	Actions
☒	16/12/22	20221307 Hydroflask Bhd	2	Matter Folder 2	Main Branch / Main Branch - Level 5 / Main Branch - Level 5 - Rack 1	AJO/LIT/001	Lost	In	Actions

(c) Deleting a Matter Folder

Click on the red bin button to delete a Matter Folder. You cannot delete a Matter Folder that is of an older volume.

Matter Folders

Client: - ALL - Date: 10/12/22 to 16/12/22
 Matter: - ALL - Status: - ALL -
 Name: In / Out: - ALL -
 Location: - ALL -
 Box: - ALL -

Search Clear

	DATE	MATTER	VOL.	NAME	LOCATION	BOX	STATUS	IN / OUT	
☐	16/12/22	20221283 East Coast Holdings S/B	1	Volume 1	Main Branch / Main Branch - Level 5	AJO/CONV/001	Running	In	Actions
☐	16/12/22	20221307 Hydroflask Bhd	2	Matter Folder 2	Main Branch / Main Branch - Level 5 /	AJO/LIT/001	Running	In	Actions

(d) Checking Out a Matter Folder

- Click on the **'Actions'** menu, then select **'Check Out'**.

Matter Folders

Client: - ALL - Date: 10/12/22 to 16/12/22
 Matter: - ALL - Status: - ALL -
 Name: In / Out: - ALL -
 Location: - ALL -
 Box: - ALL -

Search Clear

	DATE	MATTER	VOL.	NAME	LOCATION	BOX	STATUS	IN / OUT	
☐	16/12/22	20221283 East Coast Holdings S/B	1	Volume 1	Main Branch / Main Branch - Level 5	AJO/CONV/001	Running	In	Actions
☐	16/12/22	20221307 Hydroflask Bhd	2	Matter Folder 2	Main Branch / Main Branch - Level 5 / Main Branch - Level 5 - Rack 1	AJO/LIT/001	Running	In	Actions

2. Select the Date of the checkout, the User who is checking out the Matter Folder, and the Expected Check In Date.

- You can also put in Remarks and add attachments.

3. Click on the 'Submit' button. The Matter Folder will now be displayed as 'Out'.

☐	DATE	MATTER	VOL.	NAME	LOCATION	BOX	STATUS	IN / OUT	
☐	16/12/22	20221283 East Coast Holdings S/B	1	Volume 1	Crown Records Management - KL Branch / Crown Records Management KL - Vault 1	AJO/CONV/001	Running	Out	Actions

4. Additionally, you can also **check out multiple Matter Folders** at the same time by selecting several Matter Folders, then click 'Bulk Actions', followed by 'Check Out'.

(e) Checking In a Matter Folder

1. Click on the 'Actions' menu, then select 'Check In'.

The screenshot shows the 'Matter Folders' page with a search filter at the top. Below the search filters, there is a table of matter folders. The first row is selected, and the 'Actions' menu is open, showing options like 'Check In', 'Check Out', and 'Report Lost'. A red box highlights the 'Check In' option, and a red arrow points to it with the text 'Select 'Check In''.

DATE	MATTER	VOL.	NAME	LOCATION	BOX	STATUS	IN / OUT
16/12/22	20221283 East Coast Holdings S/B	1	Volume 1	Crown Records Management - KL Branch / Crown Records Management KL - Vault 1	AJO/CONV/001	Running	Out
16/12/22	20221307 Hydroflask Bhd	2	Matter Folder 2	Main Branch / Main Branch - Level 5 / Main Branch - Level 5 - Rack 1	AJO/LIT/001	Running	In

2. Select the Date of the check in and any Remarks, then click 'Submit'.

The screenshot shows the 'Check In' form. It has fields for 'Date' (set to 22/12/22) and 'Remarks'. Below these fields is an 'Attachments' section with a 'Drop File Here' button and a 'SELECT' button. At the bottom, there are 'Submit' and 'Cancel' buttons. The 'Submit' button is circled in red.

3. Additionally, you can also **check in multiple Matter Folders** at the same time by selecting several Matter Folders, then click 'Bulk Actions', followed by 'Check In'.

The screenshot shows the 'Matter Folders' page with two matter folders selected. The 'Bulk Actions' menu is open, showing options like 'Check In', 'Check Out', and 'Report Lost'. A red box highlights the 'Check In' option, and a red arrow points to it with the text 'Click on 'Check In''. Another red box highlights the checkboxes for the two selected matter folders, with the text 'Select the Matter Folders'.

DATE	MATTER	VOL.	NAME	LOCATION	BOX	STATUS	IN / OUT
16/12/22	20221283 East Coast Holdings	1	Volume 1	Crown Records Management - KL Branch / Crown Records Management KL - Vault 1	AJO/CONV/001	Running	Out
16/12/22	20221307 Hydroflask Bhd	2	Matter Folder 2	Main Branch / Main Branch - Level 5 / Main Branch - Level 5 - Rack 1	AJO/LIT/001	Running	In

(f) Transferring a checked out Matter Folder to another User

1. Click on the '**Actions**' menu, then select '**Check Out Transfer**'.

home conflict check clients matters unbilled timer memo record calendar invoice vouchers suppliers banks ledger reports settings

Matter Folders

Create Transfer Matter Bulk Actions Less

Client: - ALL - Date: 10/12/22 to 16/12/22
Matter: - ALL - Status: - ALL -
Name: In / Out: - ALL -
Location: - ALL -
Box: - ALL -
Search Clear

	DATE	MATTER	VOL.	NAME	LOCATION	BOX	STATUS	IN / OUT	
▶	16/12/22	20221283 East Coast Holdings S/B	1	Volume 1	Crown Records Management - KL Branch / Crown Records Management KL - Vault 1	AJO/CONV/001	Running	Out	Actions Check In Check Out Transfer Report Lost
▶	16/12/22	20221307 Hydroflask Bhd	2	Matter Folder 2	Main Branch / Main Branch - Level 5 /	AJO/LIT/001	Running	In	

Select 'Check Out Transfer'

2. Select the Date of the checkout, the User who is checking out the Matter Folder, and the Expected Check In Date.
- You can also put in Remarks and add attachments. Click on the '**Submit**' button.

Check Out Transfer

Date * 16/12/22
Check Out By * JAY - Jayvinder Singh
Expected Check In Date 01/02/23
Remarks

Attachments

Submit Cancel

- Additionally, you can also **transfer multiple Matter Folders** at the same time by selecting several Matter Folders, then click '**Bulk Actions**', followed by 'Check Out Transfer'.

The screenshot shows the 'Matter Folders' page with a table of folders. A red box highlights the 'Check Out Transfer' option in the 'Bulk Actions' dropdown menu. Another red box highlights the checkboxes for two matter folders in the table.

	DATE	MATTER	VOL.	NAME	LOCATION	BOX	STATUS	IN / OUT	
☒	16/12/22	20221283 East Coast Holdings	1	Volume 1	Crown Records Management - KL Branch / Crown Records Management KL - Vault 1	AJO/CONV/001	Running	Out	Actions
☒	16/12/22	20221307 Hydroflask Bhd	2	Matter Folder 2	Main Branch / Main Branch - Level 5 / Main Branch - Level 5 - Back 1	AJO/LIT/001	Running	In	Actions

(g) Reporting a Matter Folder as lost

- Click on the '**Actions**' menu, then select '**Report Lost**'.

The screenshot shows the 'Matter Folders' page with a table of folders. A red box highlights the 'Report Lost' option in the 'Actions' dropdown menu. Another red box highlights the checkbox for a matter folder in the table.

	DATE	MATTER	VOL.	NAME	LOCATION	BOX	STATUS	IN / OUT	
☐	16/12/22	20221283 East Coast Holdings S/B	1	Volume 1	Crown Records Management - KL Branch / Crown Records Management KL - Vault 1	AJO/CONV/001	Running	Out	Actions
☐	16/12/22	20221307 Hydroflask Bhd	2	Matter Folder 2	Main Branch / Main Branch - Level 5 / Main Branch - Level 5 - Back 1	AJO/LIT/001	Running	In	Actions

- Select the Date and who reported the Matter Folder as lost.
- You can also put in Remarks and add attachments.

The screenshot shows the 'Report Lost' form with the following fields filled out:

- Date: 16/12/22
- Reported By: AO - Alyssa J. Oon
- Remarks: Fire broke out

The 'Submit' button is highlighted with a red circle.

- Click on the **'Submit'** button. The Matter Folder will now be displayed as 'Lost'.

16/12/22	20221307 Hydroflask Bhd	2	Matter Folder 2	Main Branch / Main Branch - Level 5 / Main Branch - Level 5 - Rack 1	AJO/LIT/001	Lost	In
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- Additionally, you can also **report multiple Matter Folders as lost** at the same time by selecting several Matter Folders, then click **'Bulk Actions'**, followed by 'Report Lost'.

home conflict check clients matters unbilled timer memo record calendar invoice vouchers suppliers banks ledger reports settings

Matter Folders

Create Transfer Matter Bulk Actions Less

Client: - ALL - Date: 10/12/22 to 16/12/22
Matter: - ALL - Status: - ALL -
Name: In / Out
Location: - ALL -
Box: - ALL -

Select the Matter Folders

Click on 'Report Lost'

Report Lost

MATTER	VOL.	NAME	LOCATION	BOX	STATUS	IN / OUT
16/12/22	20221283	1	Volume 1	Crown Records Management - KL Branch / Crown Records Management KL - Vault 1	AJO/CONV/001	Running Out

(h) View a Matter Folder's attachments, information, and history

- Click on the arrow to the left of the Matter Folder to expand the menu.

16/12/22	20221307 Hydroflask Bhd	1	File Ref No: 2022/LIT/1307/V1	Main Branch / Main Branch - Level 5 / Main Branch - Level 5 - Rack 1	AJO/LIT/001	Running	In	Actions
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Expand

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- Click on **'Attachments'** to see all the Matter Folder's attachments. Click on a file to view the attachment.

Attachments

document 3.jpeg document 2.jpeg document 1.jpeg document 4.jpeg

- Click on **'More Information'** to see details about the Matter Folder, who has checked it out, etc.

Attachments

More Information

Check Out By: Jayvinder Singh Expected Check In Date: 31/01/2023
Remarks: -

Client: East Coast Holdings S/B
Matter No.: 20221283 Partner In Charge: Joshua Tan
Matter Description: Trademark for Eastcost for CoreMatter inclusion

4. Click on '**History**' to see all checkouts/check-ins or edits that have been made.

History				
DATE	TIME	USER	ACTION	DESCRIPTION
16/12/22	10:41:02	Alyssa J. Oon	Check Out Transfer	Check Out By : Jayvinder Singh Check Out Date : 16/12/2022 Expected Check In Date : 31/01/2023 Remarks : -
16/12/22	10:15:56	Alyssa J. Oon	Check Out	Check Out By : Joan Lim Check Out Date : 16/12/2022 Expected Check In Date : 31/01/2023 Remarks : Approved by Joshua
16/12/22	10:15:17	Alyssa J. Oon	Edit	Date : 16/12/2022 Name : Volume 1 Location : Crown Records Management - KL Branch / Crown Records Management KL - Vault 1 Box : AJO/CONV/001 Remarks : -
16/12/22	10:01:26	Alyssa J. Oon	Create	Matter : 20221283 Vol : 1 Date : 16/12/2022 Name : Volume 1

(i) Transfer a Matter Folder to a different Matter

1. Click on the '**Transfer Matter**' button.

home conflict check clients matters unbilled timer memo record calendar invoice vouchers suppliers banks ledger reports settings

Matter Folders

Create **Transfer Matter** Bulk Actions Less

Client: - ALL - Date: 16/12/22 to 22/12/22
Matter: - ALL - Status: - ALL -
Name: In / Out: - ALL -
Location: - ALL -
Box: - ALL -

Search Clear

2. Select the 'From Matter' and then select the 'To Matter'.
- You can also put in attachments.
 - **Click the 'Submit' button.** All volumes of the Matter Folder will be moved to the new Matter.

clients matters unbilled timer memo record calendar invoice vouchers suppliers banks ledger

Transfer Matter

From Matter * 20221307 - Hydroflask Bhd | Suit against

To Matter * 20221315 - University of Nottingham |

NOTES:

1. Only allow to transfer to another Matter without any existing Matter Folder.
2. All volumes will be transferred.

Attachments

Drop File Here SELECT

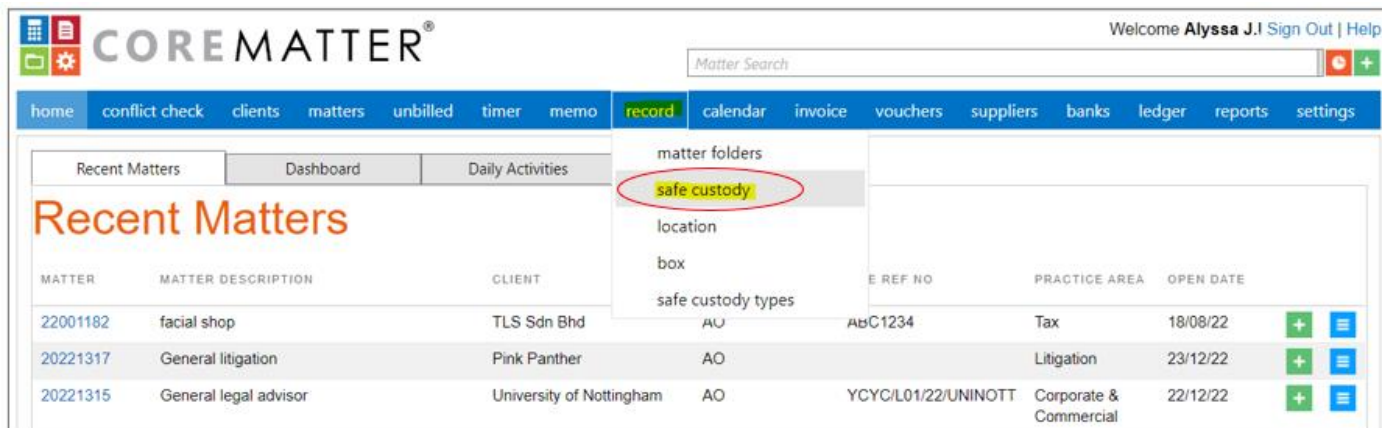
No Attachment

Submit Cancel

Creating and managing Safe Custody items

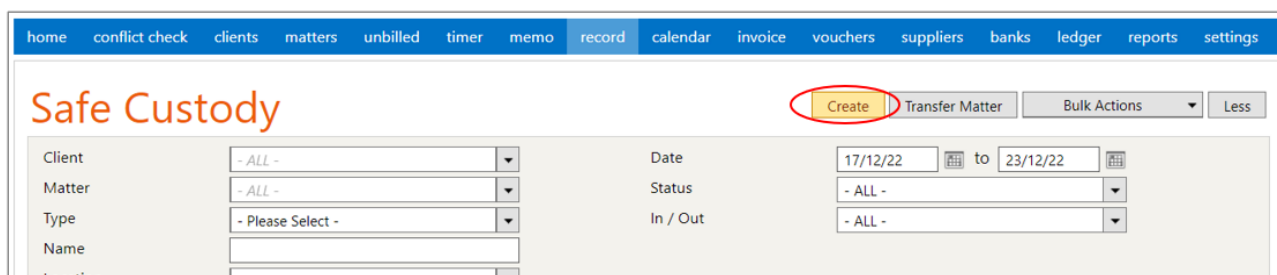
Safe Custody is where you list down and manage the documents you are safeguarding for Clients.

You can find Safe Custody under **Record > Safe Custody**.

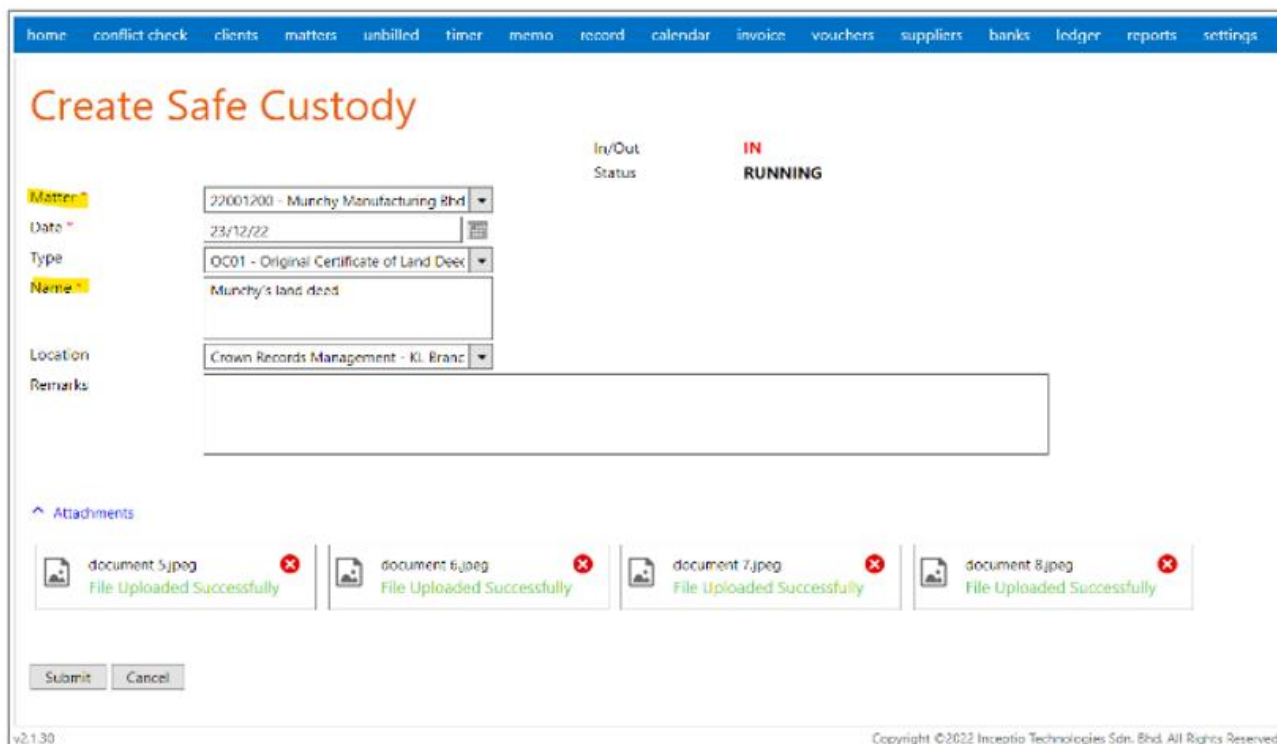


(a) Creating a Safe Custody item

1. Click on the 'Create' button.



2. Select the **Matter** for this Safe Custody item, and key in the **name of the document at Name**.
 - You can also select a Safe Custody Type and a Location for this item
 - If needed, type in your Remarks and attach up to four (4) attachments.



3. Click on the 'Submit' button to create the record.

^ Attachments

document 5.jpeg File Uploaded Successfully

document 6.jpeg File Uploaded Successfully

document 7.jpeg File Uploaded Successfully

document 8.jpeg File Uploaded Successfully

Submit Cancel

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(b) Editing a Safe Custody item

1. Click on the **blue pencil icon** to open the 'Edit Safe Custody' page.

home conflict check clients matters unbilled timer memo record calendar invoice vouchers suppliers banks ledger reports settings

Safe Custody

Create Transfer Matter Bulk Actions Less

Client: - ALL - Date: 17/12/22 to 23/12/22

Matter: - ALL - Status: - ALL -

Type: - Please Select - In / Out: - ALL -

Name: Location: - ALL -

Search Clear

	DATE	MATTER	TYPE	NAME	LOCATION	STATUS	IN / OUT	
▶	23/12/22	22001200 Munchy Manufacturing Bhd	OC01 - Original Certificate of Land Deed	Munchy's land deed	Crown Records Management - KL Branch / Crown Records Management KL - Vault 1	Running	In	Actions 
▶	20/12/22	20221310 Acacia Deal Sdn Bhd	W01 - Will	Will	Main Branch / Main Branch - Level 5	Running	In	Actions 

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2. You can make amendments to the Matter, Date, Type, Name, Location, Remarks, and add or remove attachments.

- You can also view the Safe Custody item's Check Out Information and History

Edit Safe Custody

In/Out Status: **IN RUNNING**

Matter: 22001200 - Munchy Manufacturing Bhd

Date: 23/12/22

Type: OC01 - Original Certificate of Land Deed

Name: Munchy's land deed

Location: Crown Records Management - KL Branch

Remarks:

^ Attachments

document 5.jpeg File Uploaded Successfully

document 6.jpeg File Uploaded Successfully

document 7.jpeg File Uploaded Successfully

document 8.jpeg File Uploaded Successfully

Check Out Information

History

Update Cancel

3. Click the 'Update' button to save any changes.

A screenshot of a web application interface showing a form with several 'File Uploaded Successfully' messages at the top. Below these, there are two expandable sections: 'Check Out Information' and 'History'. At the bottom of the form, there are two buttons: 'Update' and 'Cancel'. The 'Update' button is circled in red.

4. Additionally, you can also edit the Location of multiple Safe Custody items at the same time by selecting several items, then click 'Bulk Actions', followed by 'Edit Location'.

A screenshot of the 'Safe Custody' page in a web application. The page has a navigation bar at the top with various tabs like 'home', 'conflict check', 'clients', etc. The main section is titled 'Safe Custody' and contains a form with fields for Client, Matter, Type, Name, and Location. Below the form is a table with columns: TYPE, NAME, LOCATION, STATUS, and IN / OUT. Two items are listed in the table, each with a checkbox in the first column. A red box labeled 'Select the Safe Custody items' points to the checkboxes. Another red box labeled 'Select to Edit Location' points to the 'Bulk Actions' dropdown menu, which is open and shows options like 'Check In', 'Check Out', 'Check Out Transfer', 'Edit Location', 'Report Lost', and 'Return to Customer'. The 'Edit Location' option is highlighted.

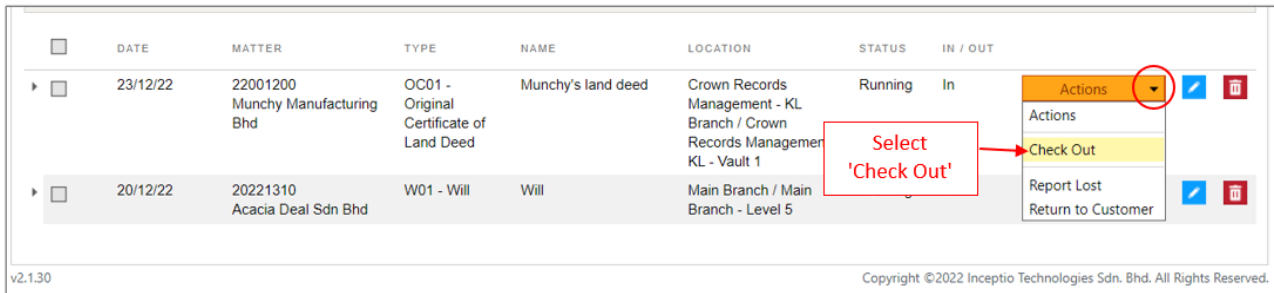
(c) Deleting a Safe Custody item

Click on the red bin button to delete a Safe Custody item. You cannot delete Safe Custody items that have been lost or returned to the Client.

A screenshot of the 'Safe Custody' page in a web application, similar to the previous one. The table now shows two items. The first item has a checkbox in the first column. A red box labeled 'Click to Delete' points to a red bin icon in the 'Actions' column of the first item. The 'Bulk Actions' dropdown menu is also visible, showing options like 'Check In', 'Check Out', 'Check Out Transfer', 'Edit Location', 'Report Lost', and 'Return to Customer'.

(d) Checking Out a Safe Custody item

1. Click on the 'Actions' menu, then select 'Check Out'.



2. Select the Date of the checkout, the User who is checking out the Safe Custody item, and the Expected Check In Date.
- You can also put in Remarks and add attachments.

The screenshot shows the 'Check Out' form. The 'Date' field is set to 23/12/22, 'Check Out By' is JL - Joan Lim, and 'Expected Check In Date' is 31/01/23. The 'Remarks' field contains 'Approved by Joshua'. The 'Attachments' section shows a file named 'approval letter.jpeg' uploaded successfully. The 'Submit' button is circled in red.

Check Out

Date * 23/12/22

Check Out By * JL - Joan Lim

Expected Check In Date 31/01/23

Remarks Approved by Joshua

Attachments

Drop File Here SELECT

approval letter.jpeg File Uploaded Successfully

Submit Cancel

3. Click on the 'Submit' button. The Safe Custody item will now be displayed as 'Out'.

The screenshot shows the same table as before, but the 'IN / OUT' status for the first item is now 'Out' (highlighted in yellow and circled in red). The 'Actions' menu is still open.

	DATE	MATTER	TYPE	NAME	LOCATION	STATUS	IN / OUT
▶	23/12/22	22001200 Munchy Manufacturing Bhd	OC01 - Original Certificate of Land Deed	Munchy's land deed	Crown Records Management - KL Branch / Crown Records Management KL - Vault 1	Running	Out
▶	20/12/22	20221310 Acacia Deal Sdn Bhd	W01 - Will	Will	Main Branch / Main Branch - Level 5	Running	In

- Additionally, you can also check out multiple Safe Custody items at the same time by selecting several items, then click '**Bulk Actions**', followed by 'Check Out'.

The screenshot shows the 'Safe Custody' interface. At the top, there's a navigation bar with tabs: home, conflict check, clients, matters, unbilled, timer, memo, record, calendar, invoice, vouchers, suppliers, banks, ledger, reports, settings. Below this, the 'Safe Custody' title is displayed. To the right of the title are buttons: Create, Transfer Matter, Bulk Actions (highlighted with a red circle), and Less. Below the title is a form with fields for Client, Matter, Type, Name, and Location, each with a dropdown menu. To the right of these fields are Date, Status, and In / Out fields. A red box labeled 'Select the Safe Custody items' points to the checkboxes in the table. Another red box labeled 'Select 'Check Out'' points to the 'Check Out' option in the 'Bulk Actions' dropdown menu.

	DATE	MATTER	TYPE	NAME	LOCATION	STATUS	IN / OUT	
☒	23/12/22	22001200 Munchy Manufacturing Bhd	OC01 - Original Certificate of Land Deed	Munchy's land deed	Crown Records Management - KL Branch / Crown Records Management KL - Vault 1	Running	Out	Actions
☒	20/12/22	20221310 Acacia Deal Sdn Bhd	W01 - Will	Will	Main Branch / Main Branch - Level 5	Running	In	Actions

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(e) Checking In a Safe Custody item

- Click on the '**Actions**' menu, then select '**Check In**'.

The screenshot shows the 'Safe Custody' interface. At the top, there's a navigation bar with tabs: home, conflict check, clients, matters, unbilled, timer, memo, record, calendar, invoice, vouchers, suppliers, banks, ledger, reports, settings. Below this, the 'Safe Custody' title is displayed. To the right of the title are buttons: Create, Transfer Matter, Bulk Actions (highlighted with a red circle), and Less. Below the title is a form with fields for Client, Matter, Type, Name, and Location, each with a dropdown menu. To the right of these fields are Date, Status, and In / Out fields. A red box labeled 'Select 'Check In'' points to the 'Check In' option in the 'Actions' dropdown menu.

	DATE	MATTER	TYPE	NAME	LOCATION	STATUS	IN / OUT	
☐	23/12/22	22001200 Munchy Manufacturing Bhd	OC01 - Original Certificate of Land Deed	Munchy's land deed	Crown Records Management - KL Branch / Crown Records Management KL - Vault 1	Running	Out	Actions
☐	20/12/22	20221310 Acacia Deal Sdn Bhd	W01 - Will	Will	Main Branch / Main Branch - Level 5	Running	In	Actions

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- Select the Date of the check in and any Remarks, then click '**Submit**'.

The screenshot shows the 'Check In' form. At the top, there's a navigation bar with tabs: home, conflict check, clients, matters, unbilled, timer, memo, record, calendar, invoice, vouchers, suppliers, banks, ledger, reports, settings. Below this, the 'Check In' title is displayed. To the right of the title are buttons: Create, Transfer Matter, Bulk Actions (highlighted with a red circle), and Less. Below the title is a form with fields for Date, Remarks, and Attachments. A red box labeled 'Submit' points to the 'Submit' button.

Date * 23/12/22

Remarks

Attachments

Drop File Here SELECT

No Attachment

Submit Cancel

3. Additionally, you can also check in multiple Safe Custody items at the same time by selecting several items, then click '**Bulk Actions**', followed by 'Check In'.

The screenshot shows the 'Safe Custody' interface. At the top, there is a navigation bar with various tabs. Below it, the 'Safe Custody' title is displayed. A search filter section includes fields for Client, Matter, Type, Name, and Location. A table lists Safe Custody items with columns: DATE, MATTER, TYPE, NAME, LOCATION, STATUS, and IN / OUT. Two items are selected, indicated by checkboxes. A red box highlights the 'Bulk Actions' dropdown menu, which is open, showing options like 'Check In', 'Check Out', 'Check Out Transfer', 'Edit Location', 'Report Lost', and 'Return to Customer'. A red arrow points to the 'Check In' option. Another red box highlights the 'Select the Safe Custody items' text, with arrows pointing to the checkboxes of the selected items.

DATE	MATTER	TYPE	NAME	LOCATION	STATUS	IN / OUT
23/12/22	22001200 Munchy Manufacturing Bhd	OC01 - Original Certificate of Land Deed	Munchy's land deed	Crown Records Management - KL Branch / Crown Records Management KL - Vault 1	Running	Out
20/12/22	20221310 Acacia Deal Sdn Bhd	W01 - Will	Will	Main Branch / Main Branch - Level 5	Running	In

(f) Transferring a checked out Safe Custody item to another User

1. Click on the 'Actions' menu, then select 'Check Out Transfer'.

This screenshot shows the 'Safe Custody' table with the same two items. The first item is selected. A red box highlights the 'Actions' dropdown menu for this item, which is open, showing options like 'Check In', 'Check Out Transfer', 'Report Lost', and 'Return to Customer'. A red arrow points to the 'Check Out Transfer' option. Another red box highlights the 'Select 'Check Out Transfer'' text, with an arrow pointing to the 'Check Out Transfer' option in the dropdown menu.

2. Select the Date of the checkout, the User who is checking out the Safe Custody item, and the Expected Check In Date.
- You can also put in Remarks and add attachments. Click on the 'Submit' button'.

The screenshot shows the 'Check Out Transfer' form. It includes fields for Date, Check Out By, Expected Check In Date, and Remarks. The Date field is set to 23/12/22, Check Out By is set to IK - Irene Kok, and Expected Check In Date is set to 01/02/23. The Remarks field contains the text 'Transfer approved by Partner'. Below the Remarks field, there is an 'Attachments' section with a 'Drop File Here' button and a 'SELECT' button. A file named 'letter.jpeg' is shown as 'File Uploaded Successfully'. At the bottom, there are 'Submit' and 'Cancel' buttons. A red box highlights the 'Submit' button.

- Additionally, you can also transfer multiple Safe Custody items at the same time by selecting several items, then click '**Bulk Actions**', followed by 'Check Out Transfer'.

The screenshot shows the 'Safe Custody' interface with a table of items. A red box highlights the 'Bulk Actions' dropdown menu, which is open, showing options like 'Check In', 'Check Out', 'Check Out Transfer', 'Edit Location', 'Report Lost', and 'Return to Customer'. A red arrow points to 'Check Out Transfer' with the text 'Select 'Check Out Transfer''. Another red box highlights the checkboxes for the first two items in the table, with the text 'Select the Safe Custody items'.

	DATE	MATTER	TYPE	NAME	LOCATION	STATUS	IN / OUT	
☒	23/12/22	22001200 Munchy Manufacturing Bhd	OC01 - Original Certificate of Land Deed	Munchy's land deed	Crown Records Management - KL Branch / Crown Records Management KL - Vault 1	Running	Out	Actions
☒	20/12/22	20221310 Acacia Deal Sdn Bhd	W01 - Will	Will	Main Branch / Main Branch - Level 5	Running	In	Actions

(g) Reporting a Safe Custody item as lost

- Click on the '**Actions**' menu, then select '**Report Lost**'.

The screenshot shows the 'Safe Custody' interface with a table of items. A red box highlights the 'Actions' dropdown menu for the second item, which is open, showing options like 'Check In', 'Check Out Transfer', 'Report Lost', and 'Return to Customer'. A red arrow points to 'Report Lost' with the text 'Select 'Report Lost''.

	DATE	MATTER	TYPE	NAME	LOCATION	STATUS	IN / OUT	
☐	23/12/22	20221317 Pink Panther	P01 - Power of Attorney	File Ref No.: PP/2022/SC01	Main Branch / Main Branch - Level 5	Running	In	Actions
☐	23/12/22	22001200 Munchy Manufacturing Bhd	OC01 - Original Certificate of Land Deed	Munchy's land deed	Crown Records Management - KL Branch / Crown Records Management KL - Vault 1	Running	Out	Actions
☐	20/12/22	20221310 Acacia Deal Sdn Bhd	W01 - Will	Will	Main Branch / Main Branch - Level 5	Running	In	Actions

- Select the Date and who reported the Matter Folder as lost.
- You can also put in Remarks and add attachments.

The screenshot shows the 'Report Lost' form. It has fields for 'Date' (23/12/22), 'Reported By' (AO - Alyssa J. Oon), and 'Remarks' (Lost to office fire). There is an 'Attachments' section with a 'Drop File Here' button and a 'SELECT' button. A file named 'bomba report.jpeg' is shown as 'File Uploaded Successfully'. At the bottom, there are 'Submit' and 'Cancel' buttons.

- Click on the **'Submit'** button. The Safe Custody item status will now be displayed as 'Lost'.

23/12/22	22001200 Munchy Manufacturing Bhd	OC01 - Original Certificate of Land Deed	Munchy's land deed	Crown Records Management - KL Branch / Crown Records Management KL - Vault 1	Lost	Out
----------	--------------------------------------	--	--------------------	--	-------------	-----

- Additionally, you can also report multiple Safe Custody items as lost at the same time by selecting several items, then click **'Bulk Actions'**, followed by 'Report Lost'.

Safe Custody

Create Transfer Matter **Bulk Actions** Less

Client: - ALL - Date: 17/12/22 to 23/12/22
 Matter: - ALL - Status: - ALL -
 Type: - Please Select - In / Out: - ALL -
 Name:
 Location: - ALL -

Select 'Report Lost' → Report Lost

Select the Safe Custody items

	DATE	MATTER	TYPE	NAME	LOCATION	STATUS	IN / OUT	
☒	23/12/22	22021317 Pink Panther	P01 - Power of Attorney	File Ref No.: PP/2022/SC01	Main Branch / Main Branch - Level 5	Running	In	Actions
☒	23/12/22	22001200 Munchy Manufacturing Bhd	OC01 - Original Certificate of Land Deed	Munchy's land deed	Crown Records Management - KL Branch / Crown Records Management KL - Vault 1	Lost	Out	

(h) Returning a Safe Custody item to Client

- Click on the **'Actions'** menu, then select **'Return to Customer'**.

	DATE	MATTER	TYPE	NAME	LOCATION	STATUS	IN / OUT	
☒	23/12/22	22021317 Pink Panther	P01 - Power of Attorney	File Ref No.: PP/2022/SC01	Main Branch / Main Branch - Level 5	Running	In	Actions
☒	23/12/22	22001200 Munchy Manufacturing Bhd	OC01 - Original Certificate of Land Deed	Munchy's land deed	Crown Records Management - KL Branch / Crown Records Management KL - Vault 1	Lost	Out	Actions
☒	20/12/22	22021310 Acacia Deal Sdn Bhd	W01 - Will	Will	Main Branch / Main Branch - Level 5			Actions

Select 'Return to Customer' → Return to Customer

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- Select the Date, which User returned the Safe Custody item to the client, and the Client's name at 'Returned To'.
- You can also put in Remarks and add attachments.

Return to Customer

Date * 23/12/22

Returned By * AO - Alyssa J. Oon

Returned To * PP02 - Pink Panther

Remarks
Collected at office lobby

Attachments
Drop File Here SELECT

No Attachment

Submit Cancel

- Click on the **'Submit'** button. The Safe Custody item status will now be displayed as 'Returned'.

	DATE	MATTER	TYPE	NAME	LOCATION	STATUS	IN / OUT
☐	23/12/22	20221317 Pink Panther	P01 - Power of Attorney	File Ref No.: PP/2022/SC01	Main Branch / Main Branch - Level 5	Returned	In

- Additionally, you can also return multiple Safe Custody items at the same time by selecting several items, then click **'Bulk Actions'**, followed by 'Return to Customer'.

home conflict check clients matters unbilled timer memo record calendar invoice vouchers suppliers banks ledger reports settings

Safe Custody

Create Transfer Matter Bulk Actions Less

Bulk Actions

- Check In
- Check Out
- Check Out Transfer
- Edit Location
- Report Lost
- Return to Customer

Select 'Return to Customer'

Select the Safe Custody items

	DATE	MATTER	TYPE	NAME	LOCATION	STATUS	IN / OUT
☐	23/12/22	20221317 Pink Panther	P01 - Power of Attorney	File Ref No.: PP/2022/SC01	Main Branch / Main Branch - Level 5	Returned	In
☒	23/12/22	22001200 Munchy Manufacturing Bhd	OC01 - Original Certificate of Land Deed	Munchy's land deed	Crown Records Management - KL Branch / Crown Records Management KL - Vault 1	Lost	Out
☒	20/12/22	20221310 Acacia Deal Sdn Bhd	W01 - Will	Will	Main Branch / Main Branch - Level 5	Running	In

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(i) View a Safe Custody item's attachments, information, and history

- Click on the arrow to the left of the Safe Custody item to expand the menu.

Land Deed Records Management KL - Vault 1

Expand

	DATE	MATTER	TYPE	NAME	LOCATION	STATUS	IN / OUT
☒	20/12/22	20221310 Acacia Deal Sdn Bhd	W01 - Will	Will	Main Branch / Main Branch - Level 5	Running	In

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- Click on **'Attachments'** to see all the Safe Custody item's attachments. Click on a file to view the attachment.

Attachments

Petronas.jpg

More Information

- Click on **'More Information'** to see details about the Safe Custody item, who has checked it out, etc.

More Information

Check Out By: Denny Yee Expected Check In Date: 31/01/2023

Remarks: -

Client: Acacia Deal Sdn Bhd

Matter No.: 20221310 Partner In Charge: Kelly Thompson

Matter Description: Patent in Vietnam

History

- Click on **'History'** to see all checkouts/check-ins or edits that have been made.

DATE	TIME	USER	ACTION	DESCRIPTION
23/12/22	07:52:41	Alyssa J. Oon	Check Out	Check Out By : Denny Yee Check Out Date : 23/12/2022 Expected Check In Date : 31/01/2023 Remarks : -
20/12/22	02:22:04	Joshua Tan	Create	Matter : 20221310 Date : 20/12/2022 Name : Will Location : Main Branch / Main Branch - Level 5 Type : W01 - Will Remarks : For chairman Attachment :

(j) Transfer a Matter Folder to a different Matter

- Click on the **'Transfer Matter'** button.

home conflict check clients matters unbilled timer memo record calendar invoice vouchers suppliers banks ledger reports settings

Safe Custody

Create **Transfer Matter** Bulk Actions Less

Client: - ALL - Date: 17/12/22 to 23/12/22
Matter: - ALL - Status: - ALL -
Type: - Please Select - In / Out: - ALL -
Name:

- Select the 'From Matter' and then select the 'To Matter'.
- You can also put in attachments.

clients matters unbilled timer memo record calendar invoice vouchers suppliers banks ledger

Transfer Matter

From Matter * 20221310 - Acacia Deal Sdn Bhd | Paten
To Matter * 20221314 - James Koh | Matrimonial Pro

Attachments
Drop File Here SELECT
No Attachment

Submit Cancel

- Click the **'Submit'** button.

If you do not find the answer to your question listed below, reach out to us at corematter@bnsasia.zohodesk.com and we will respond as soon as possible.

1. **How can a user who does not have access to the 'Record' tab check what Matter Folders or Safe Custody items a Matter has?**

The Matter will have a 'Records' tab where users can check this information.

2. **I do not see an option to turn on the PRM module in the Role settings.**

Please note that the PRM module is an add-on service with its own subscription fee. The PRM module settings will only be viewable to firms who subscribe to this service.

3. **Can I upload videos as an attachment?**

Yes.

4. **What is the storage capacity for attachments?**

All firms are allocated a storage capacity of 1TB. This can be increased, if needed.

5. **What is the maximum number of attachments?**

Each Matter Folder and/or Safe Custody item can take up to four (4) attachments max. Each attachment has to be under 50MB each. This can be increased, if needed.

6. **If I eventually delete all the attachments but retain the Matter Folder, will the history of all my actions be retained indefinitely or is there an expiry date to how long CoreMatter keeps the information?**

The history will be kept indefinitely.

7. **What do Matter Folders have volumes?**

A Matter may contain more than one Matter Folder. If the Matter is a huge case, it may have more than one physical folder to keep all the Matter-related documents. Hence, why there are volumes for the Matter Folders.