

Keep documents in folders and versions

Updated 28 October 2026 · unforged.ai/help/desk/keep-documents-in-folders-and-versions

A busy matter soon has dozens of documents. Folders keep them in order, versions keep each draft together with the one before, and search finds a document wherever it is.

1 Open the matter's documents

Go to **Matters**

Open the matter and press **Open** beside **Documents**.

2 Make a folder

Press **New folder**, name it, choose where it goes under **Inside** and press **Make it**.

Pick a folder to **Rename** it, or **Remove folder** once it's empty.

3 Move documents into it

Tick the documents, choose the folder under **Move to a folder** and press **Move**. Or press the menu button on one document and choose **Move to a folder**.

4 Add a new version

Press the menu button on the document and choose **Versions**, then press **Add a new version** and pick the file.

Press **Give it a title** on a version to say what it is, like "Sent to the other side".

5 See what changed

The versions page shows the words added and taken out since the version before, so you can see a change without reading both.

6 Search across every matter

Go to **Search**

Type words from a document, its title or its tags. Narrow it to some matters if you need to.

If something goes wrong

It says it can't compare the words.

One of the versions is a scan, so there are no words to read. Open each version to compare them by eye.