

File your first record

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Filing a document puts it somewhere safe, with the dates your organisation has agreed for keeping it. It takes a minute, and you can see exactly how it will be kept before anything is filed.

Before you start

You need permission to file records. Members, admins and owners have it to start with, and if you don't, an admin in your organisation can give it to you.

1 Open Files and add a document

Go to **Files** and click **Add documents**, then **Choose files** and pick the document. You can also drag a file straight onto the list of files in any folder.

2 Check where it's going

Filing into shows the folder it will go in. Change it if you need to, or use **New folder here** to make one on the spot.

3 Add a matter or subject if it helps

Matter and **Subject** are optional, but they make the record easier to find later. A matter might be "Harper & Lowe lease renewal", and a subject might be the client's name.

4 Pick its class

The class decides how long the record is kept. Your organisation's default is chosen for you, and **Earliest it can be deleted** shows the first date it could go, so you can check it looks right.

5 Confirm and file it

Tick the box to say you understand how it will be kept, then click **File the document**. When it shows **FILED**, click **Open the record** to see it.

Retained and Locked

Most records are **RETAINED**: nobody can edit them, and deleting one early needs two administrators and a reason. Some classes make records **LOCKED**, and then no one can delete them before their date, not even an administrator. If anything you're filing will be Locked, you'll be asked to confirm that separately.

If something goes wrong

There's no **Add documents button.**

You don't have permission to file records yet. Ask an admin in your organisation to give it to you, then reload the page.

A file shows **NOT FILED.**

The line under it says why. Fix what it mentions, then click **Try the ones that didn't go in again**. If it still won't go in, write to us at support@unforged.ai.