D365 LEGAL HUB

QUICK START GUIDE

Legal DMS

Matter and client documents

Matters • Documents • Templates

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Purpose of this guide

DMS stands for **Document Management System**: a SharePoint site that shows every matter's folder, with its details from Dynamics 365.

What this covers

The **Matters** and **Clients** pages, search, previews and **emails**, versions, uploads and **templates**.

Who should use it

Lawyers and **support staff** who work with matter documents and correspondence.

Recommended process

Find the **matter**, work in its **folders**, and create letters from **templates** so details fill in for you.

How to open it: in Microsoft 365, open **SharePoint** and go to the firm's Legal DMS site (Legal 2026 in this guide) or use the link from your administrator. Click **Matters**, and use **Add to favorites** to find it quickly next time. You only see matters you have access to in Dynamics 365.

How the DMS fits together

Each page covers one part of working with documents. Dynamics 365, Outlook and timers connect to the same matter folders.

IN THE LEGAL DMS SITE

Matters
Find matters and search documents

Steps 01–03

Matter folders
Folders, activity, upload and new files

Steps 04–05, 10–11

Preview & emails
Read files, emails and attachments

Steps 06–08

Versions
Earlier versions and compare

Step 09

Templates
Letters filled in from the matter

Steps 12–13, 15

Clients
KYC and client-level papers

Step 14

One folder for every matter and client
Each matter and client in Dynamics 365 has a SharePoint folder. The DMS shows it with the matter's details, and access follows Dynamics 365 security.

CONNECTED TO

details & access

Dynamics 365
Matters, clients and who can see them. Folders are created from here.

filed emails

Outlook add-in
File emails into matter folders and attach DMS documents.

timer bar

Timers
Time on matters and new documents, ready to record.

Outlook add-in and timers have their own guide.

01

Matters Page

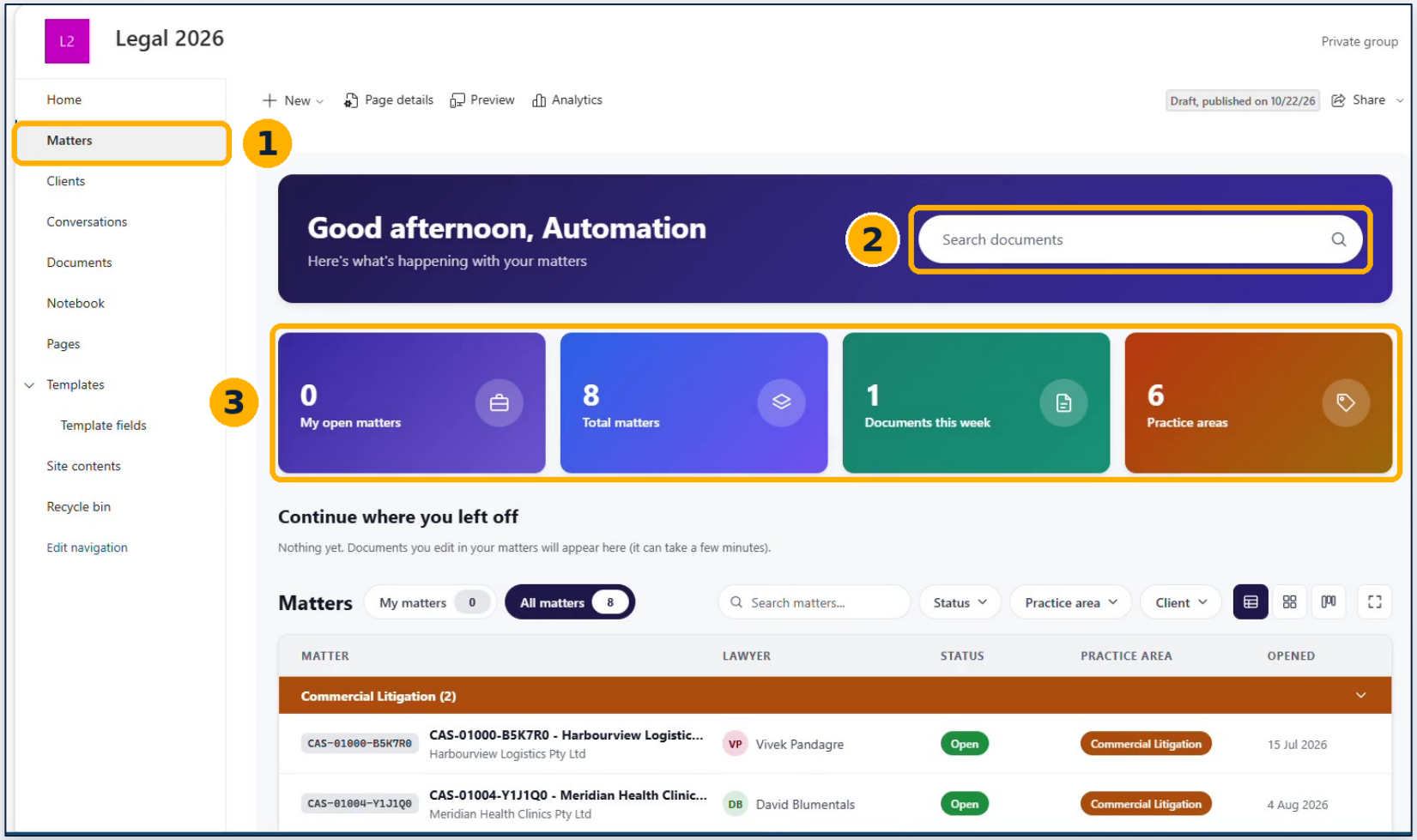
Your starting point in the **DMS**.

Steps:

1. Click **Matters** in the left menu
2. Use **Search documents** to find a file in any matter
3. Check the tiles: your open matters, all matters and documents this week

Note: Continue where you left off lists the last files you edited.

The Matters page sums up your work and lists every matter you can access.



02

Find a Matter

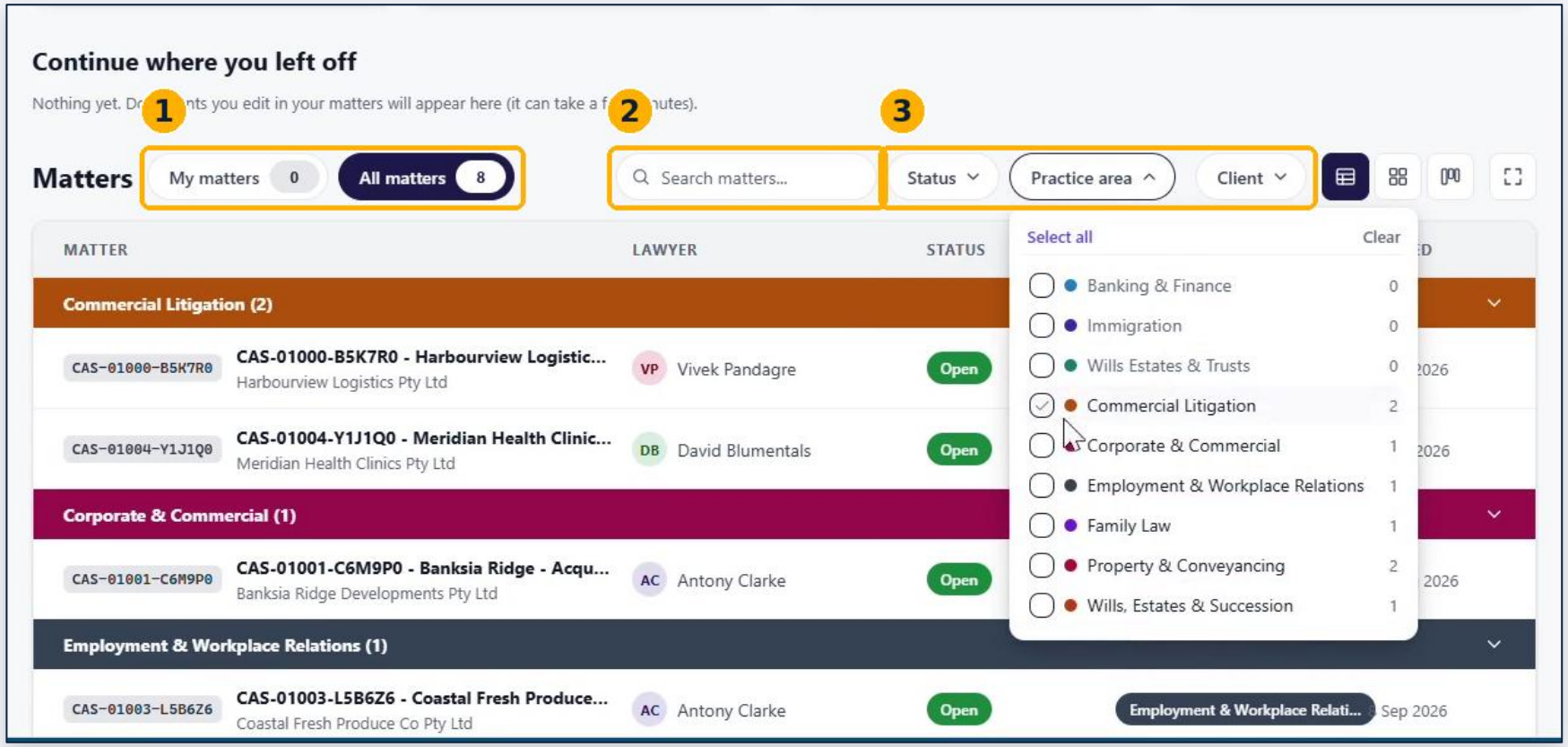
Narrow the list to the **matter** you need.

Steps:

1. Choose **My matters** or **All matters**
2. Type a number, title or client in **Search matters**
3. Filter by **Status**, **Practice area** or **Client**, then click the matter

Note: Switch between table, card and board views with the icons beside the filters.

My matters are the ones where you are the Responsible Attorney.



03

Search Documents

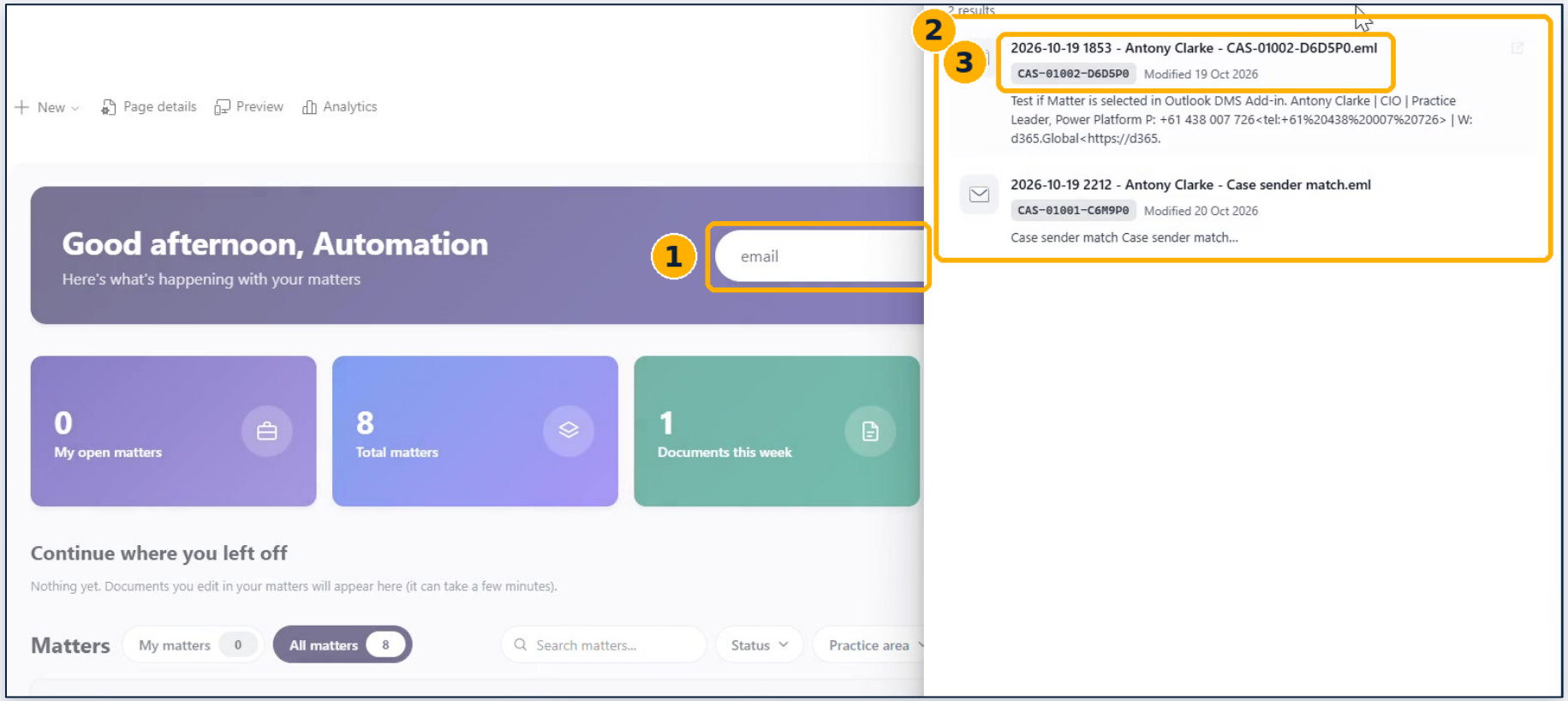
Find a file when you don't know the **matter**.

Steps:

1. Type a word in **Search documents** and press Enter
2. Read the results: file name, matter number and matching text
3. Click a result to open the file

Note: New files can take a few minutes to appear in search.

Search looks inside file names and content in every matter you can access.



04

Inside a Matter

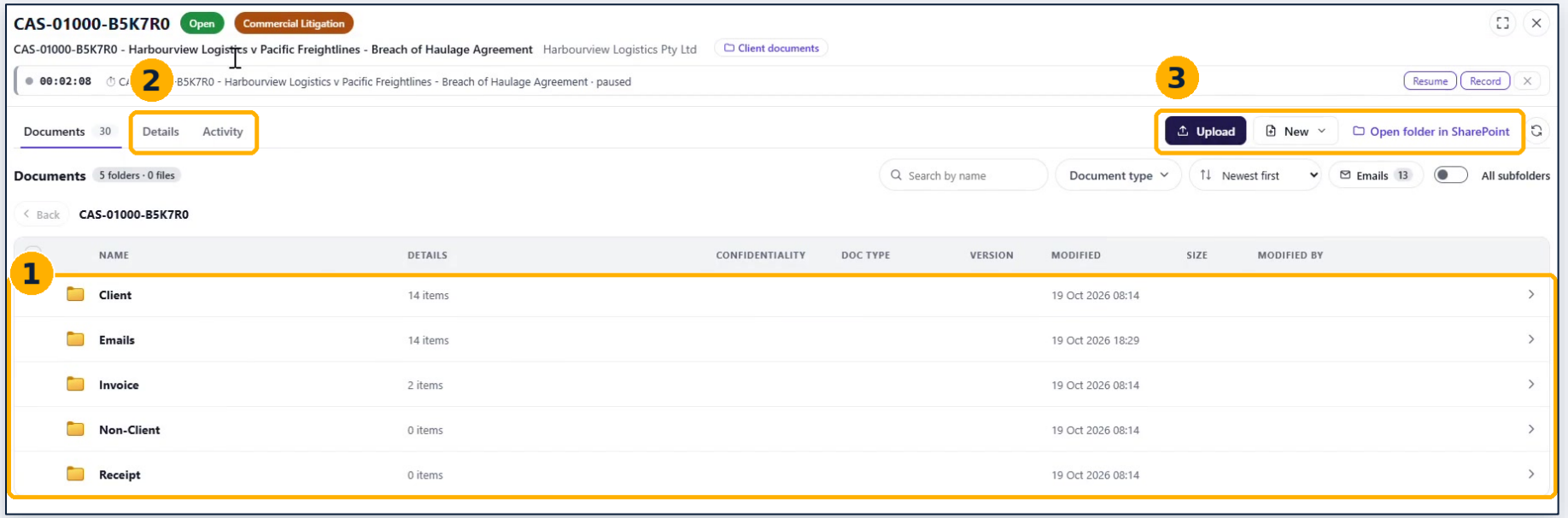
Every matter opens with its own **folders**.

Steps:

1. Click a folder, such as **Client** or **Emails**, to open it
2. Use the **Details** and **Activity** tabs for matter information and history
3. Use **Upload**, **New** or **Open folder in SharePoint**

Note: Client documents, beside the matter title, opens the client's own folder.

The panel shows the matter number, status, practice area and client at the top.



05

Activity & Timer

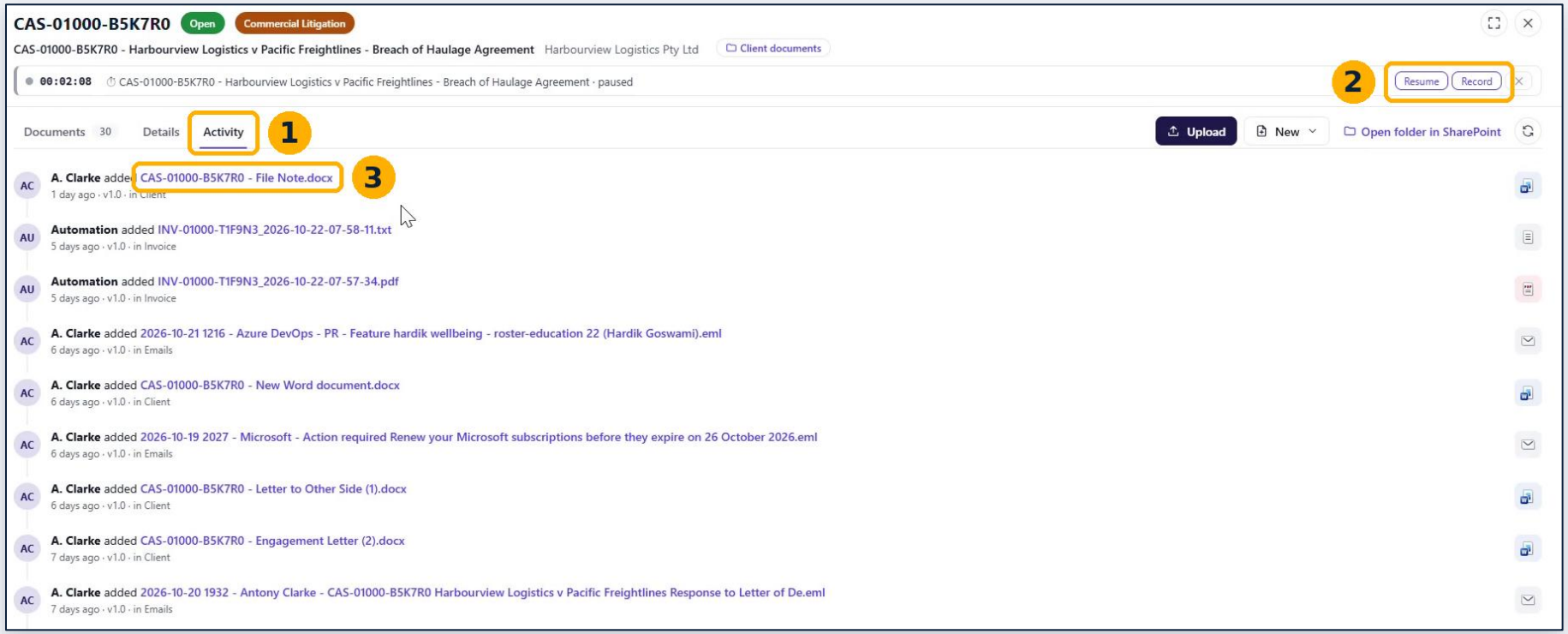
See what changed, and time your **work**.

Steps:

1. Click the **Activity** tab
2. Click **Resume** to restart the matter's timer, and **Record** to save the time
3. Click a file name to open it

Note: Timers are covered in the Outlook add-in and Timers guide.

Activity lists every file added or changed in the matter, newest first.



06

Preview Files

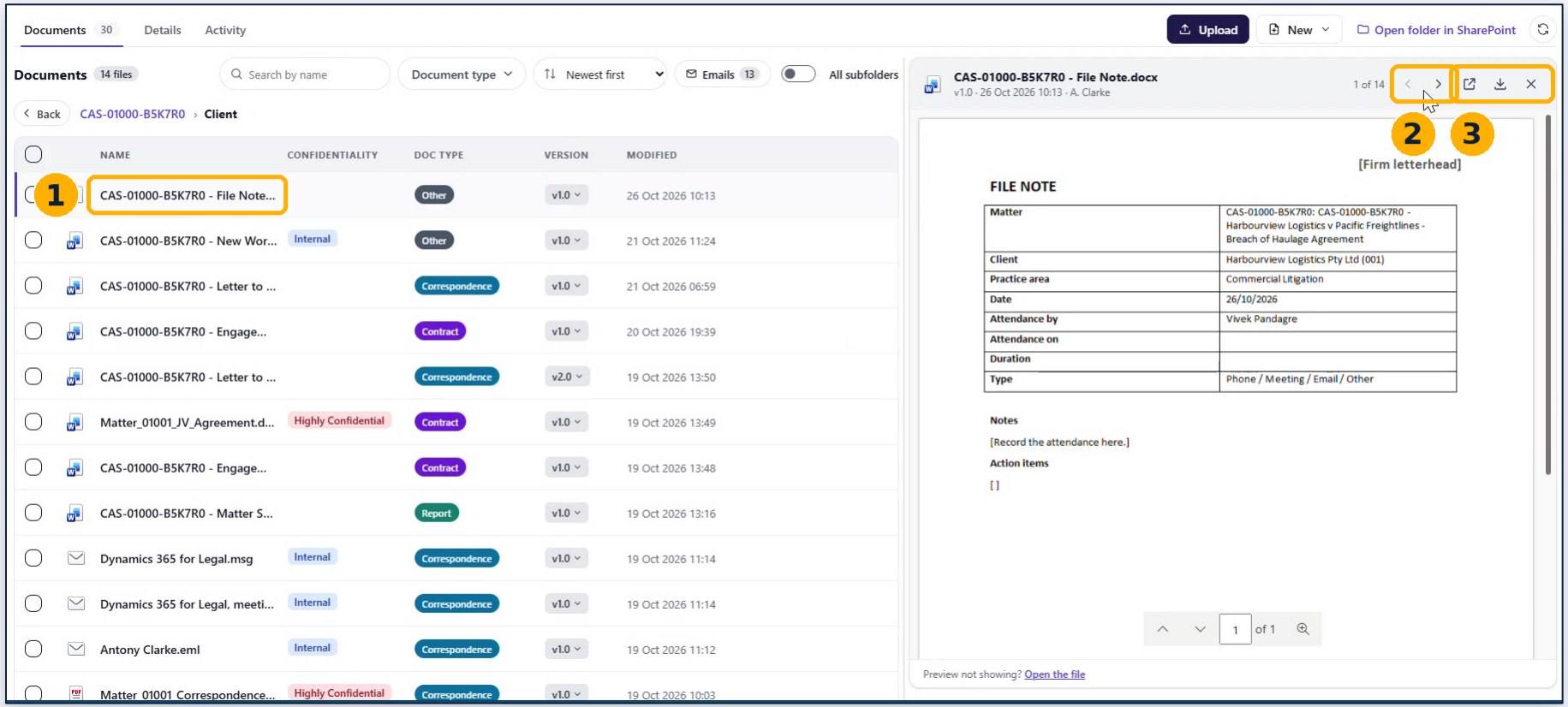
Read files without **opening** them.

Steps:

1. Click a file name to preview it
2. Use the arrows, or the arrow keys, to move to the next file
3. Use the buttons to open in a new tab, download or close

Note: Preview not showing? Click **Open the file** under the preview.

Word, Excel, PDF and image files preview beside the list.



07

Emails

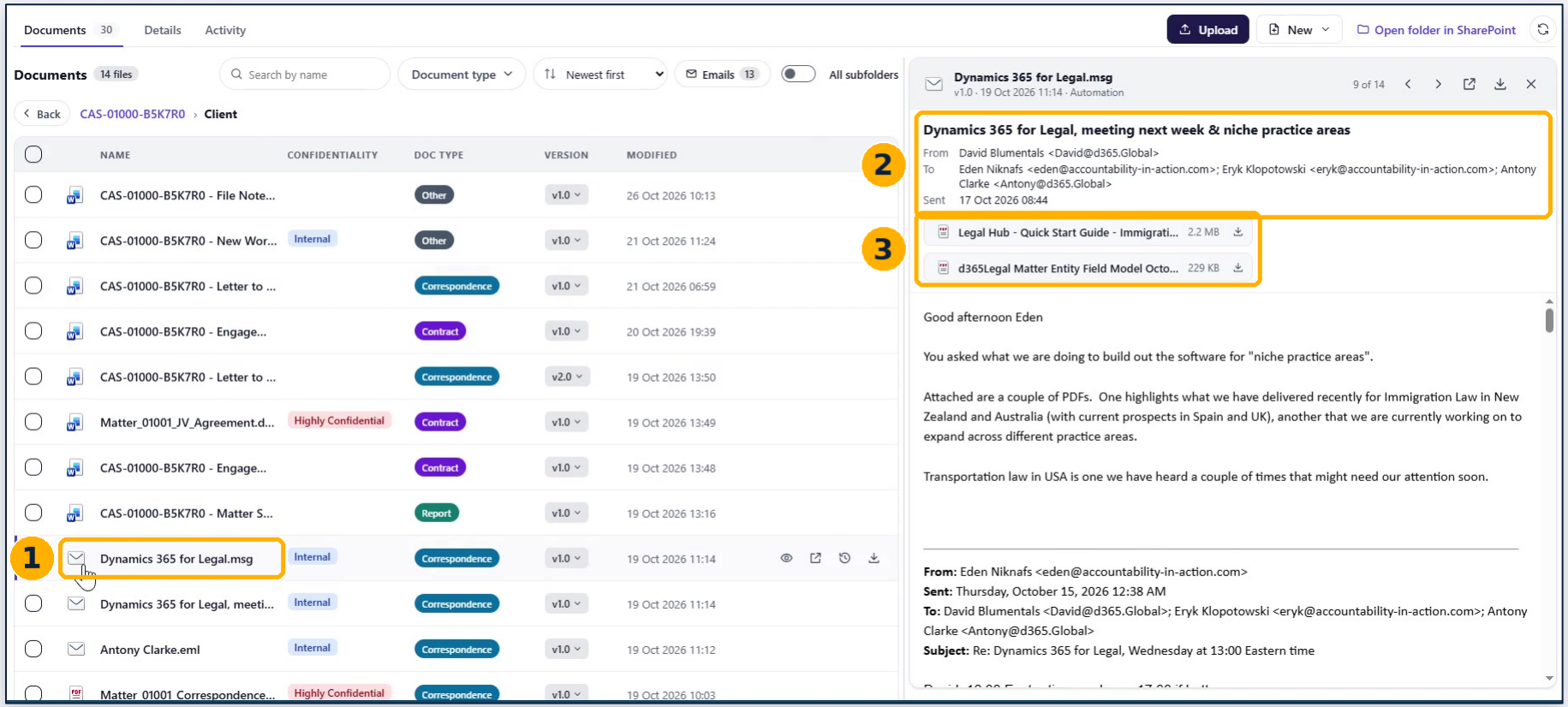
Filed emails keep their **attachments**.

Steps:

1. Click an email to preview it
2. Check who it is from and to, and when it was sent
3. Click an attachment to preview it. **Back to email** returns

Note: Use the download icon to save the email or an attachment.

Emails show with an envelope icon in the file list.



08

Email Filter

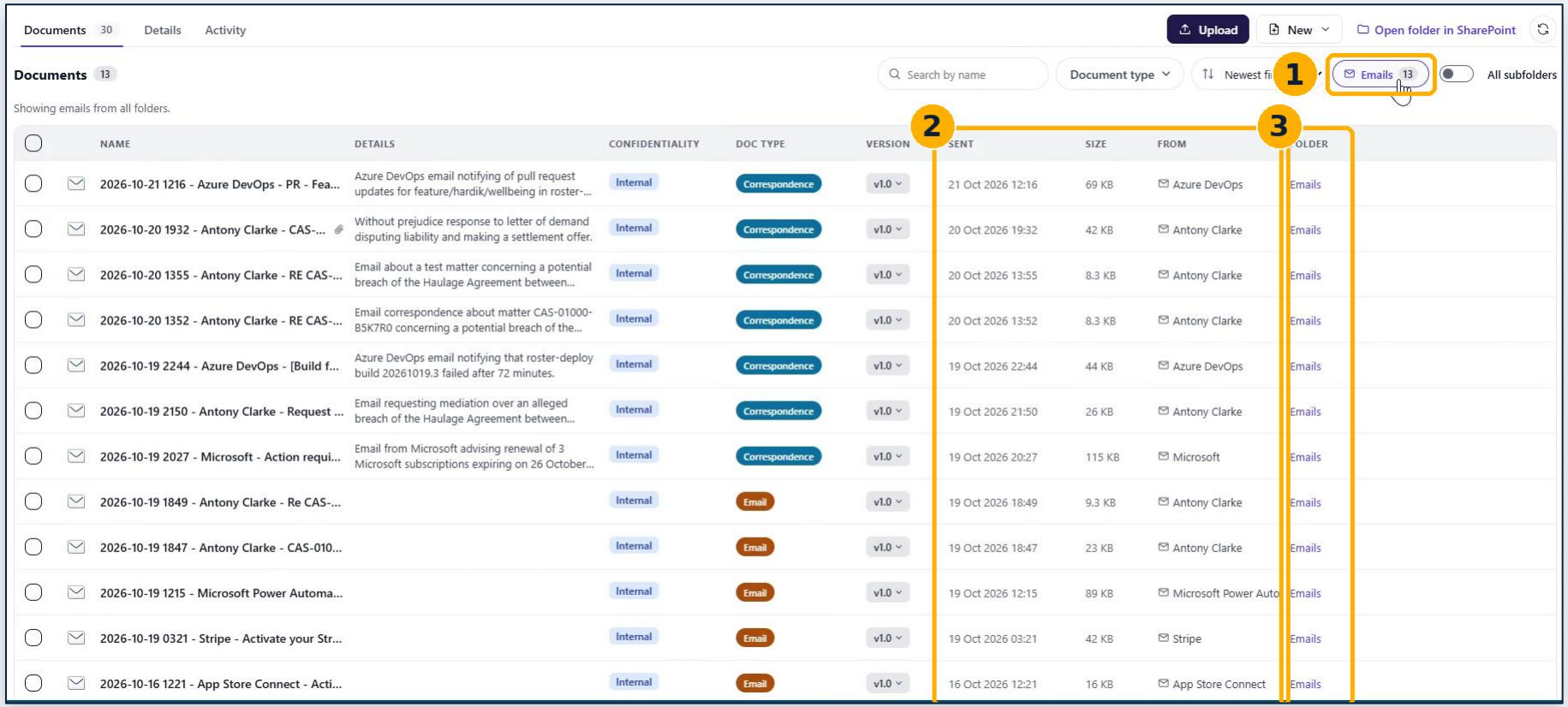
Read a matter's **correspondence** in order.

Steps:

1. Click **Emails** above the list
2. Read **Sent** and **From** to follow the correspondence
3. Check **Folder** to see where each email is filed

Note: Turn on **All subfolders** to list every file in the matter in one list.

The Emails filter lists every email in the matter, from all folders.



09

Versions

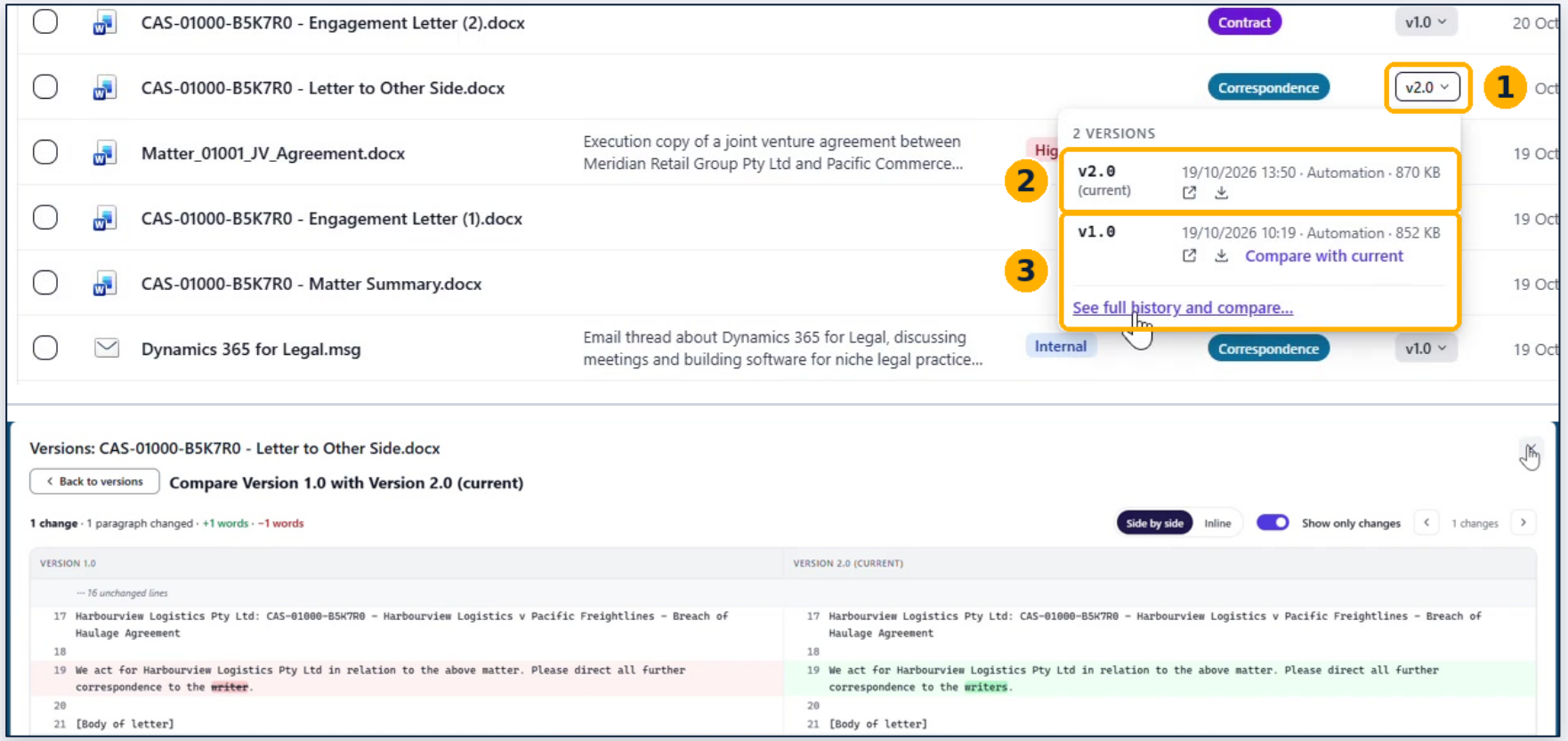
Every change is kept as a **version**.

Steps:

1. Click the version button, for example **v2.0**
2. Open or download any version
3. Click **Compare with current** to see changes side by side or inline

Note: See full history and compare opens the full version history.

The Version column shows the current version. A newer upload adds a version.



10

Upload Files

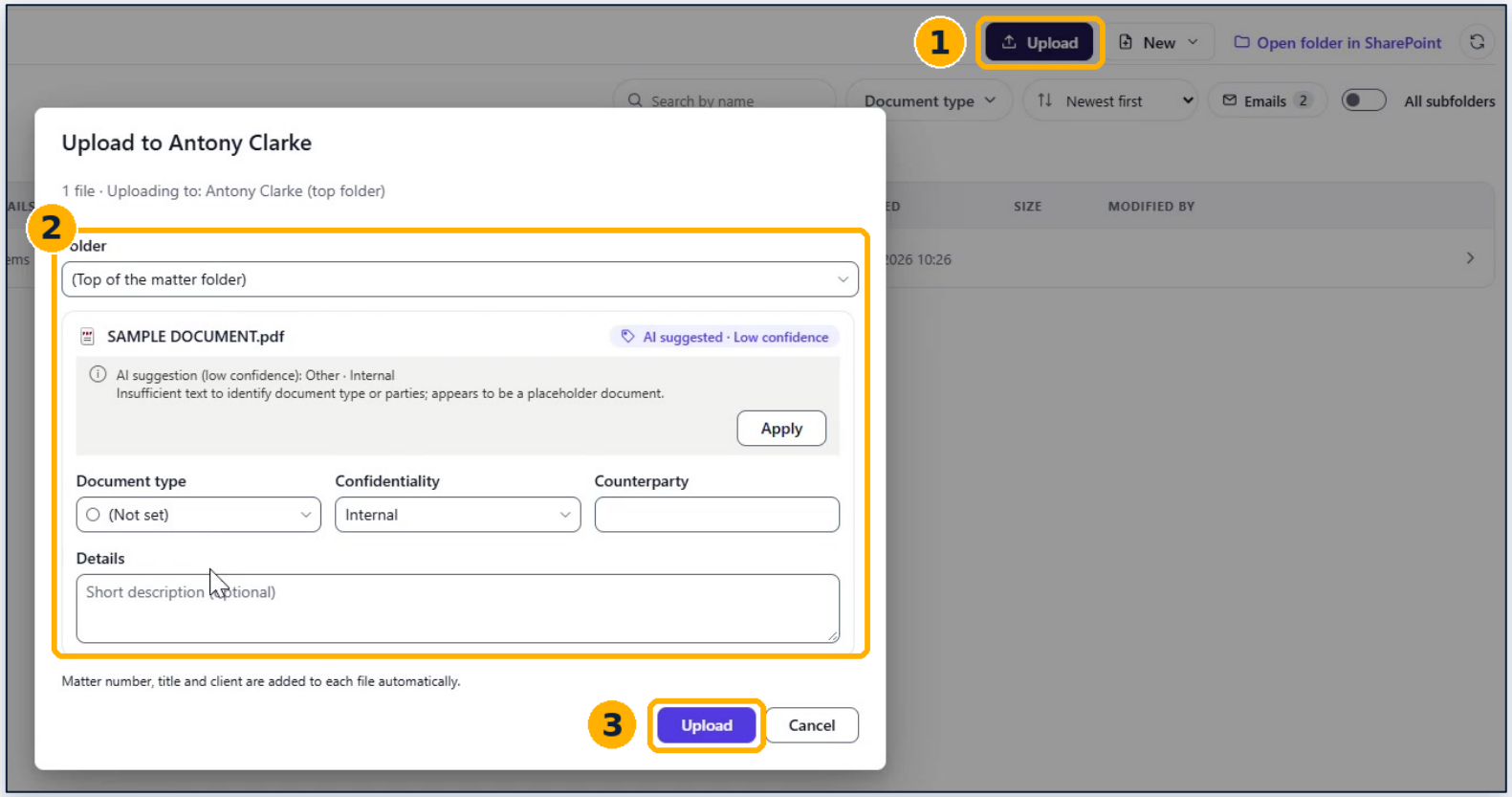
Add files and **tag** them.

Steps:

1. Click **Upload** and choose files
2. Check the **Folder** and tags. Click **Apply** to use the AI suggestion
3. Click **Upload**

Note: Drop files inside the file list, not elsewhere on the page.

Use Upload, or drop files onto the file list. The DMS reads each file and suggests tags.



11

New Documents

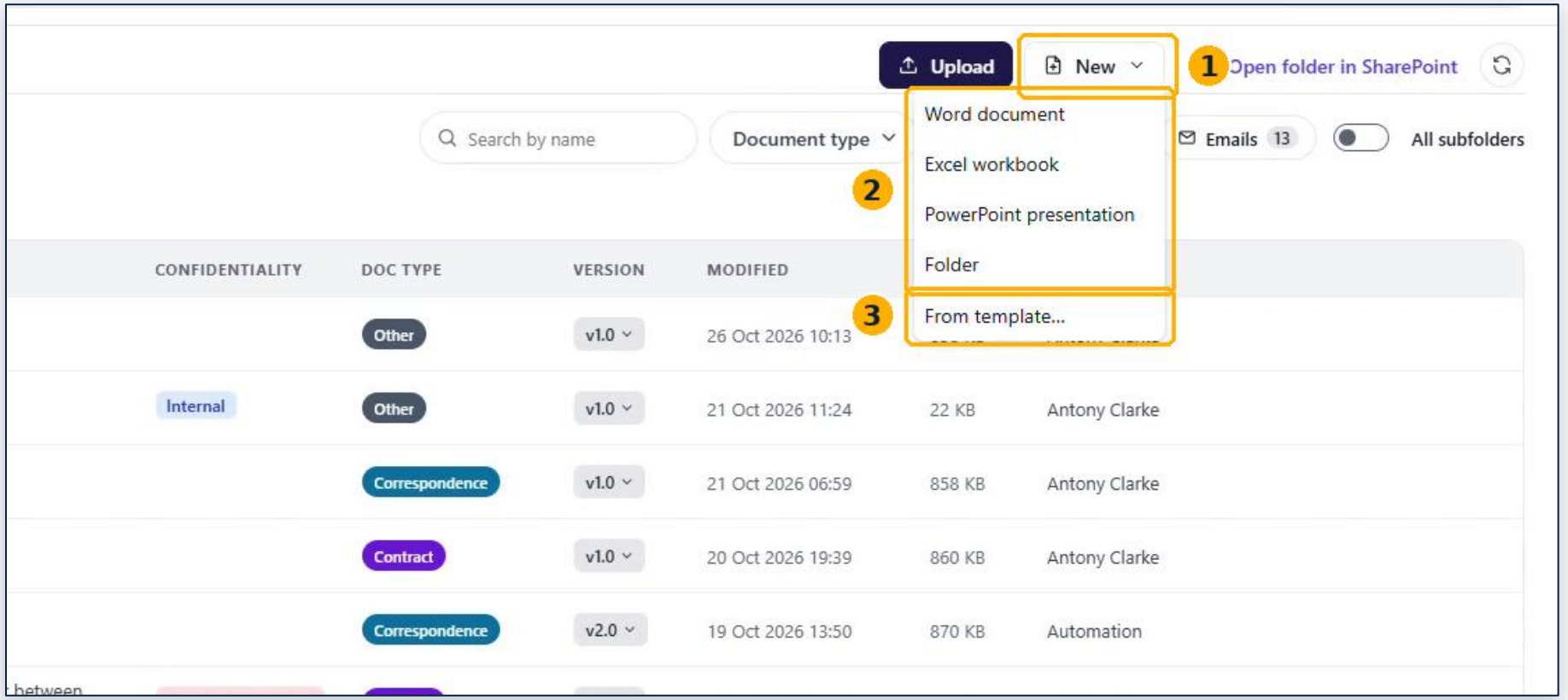
Create a blank file or a **template**.

Steps:

1. Click **New**
2. Pick Word document, Excel workbook, PowerPoint presentation or Folder
3. Or pick **From template...** (next step)

Note: Blank files are named after the matter number. Rename them after creating.

New files are created in the folder you are in.



12

From Template

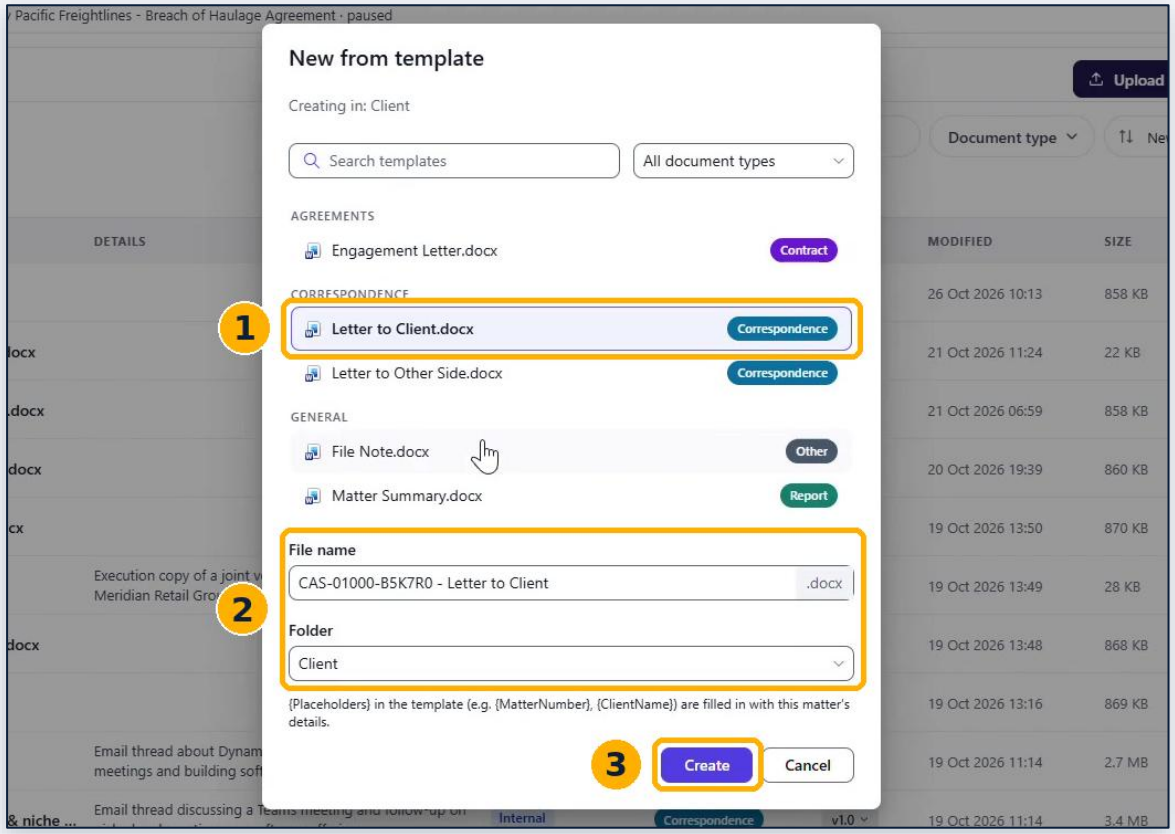
Start with the matter details **filled in**.

Steps:

1. Pick a template, for example **Letter to Client**
2. Check the **File name** and **Folder**
3. Click **Create**, then **Open in Word Online**

Note: Nothing is overwritten. If the name is taken, (1) is added.

Templates are grouped by category. Search by name or narrow by document type.



13

Check the Letter

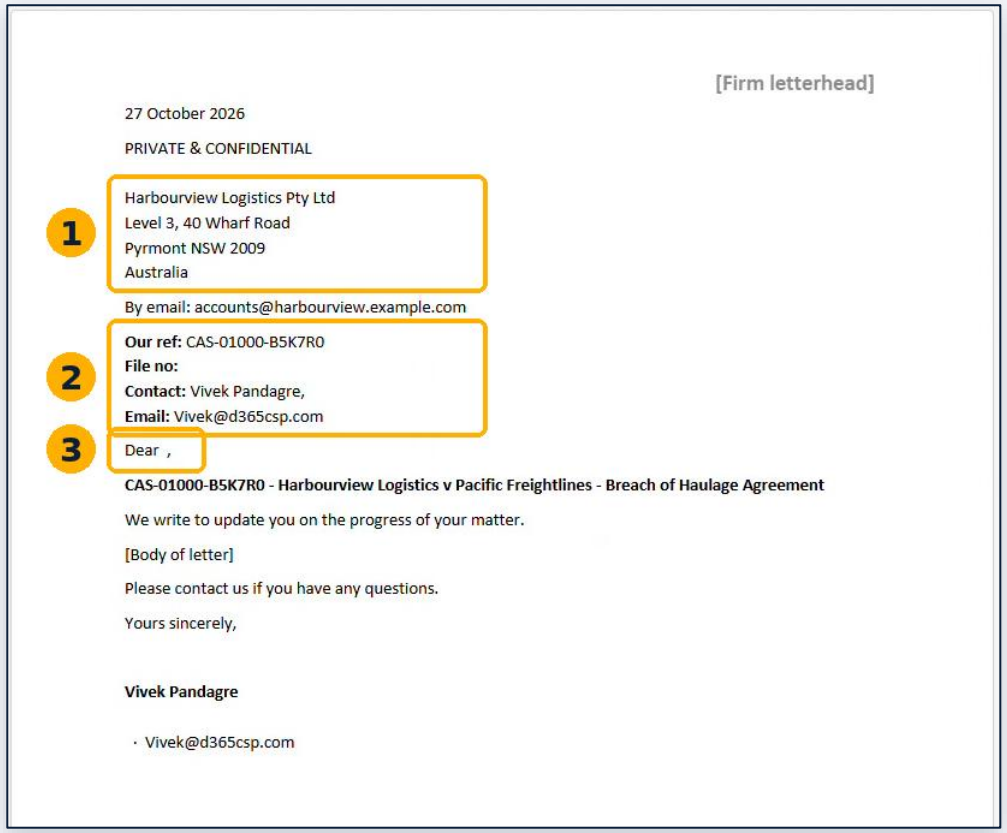
Review what was **filled in**.

Steps:

1. Check the client name and address
2. Check the reference, contact and email
3. Fill in anything left blank, such as the greeting

Note: A blank field means the detail is missing in Dynamics 365.

Details come from the matter and client in Dynamics 365.



[Firm letterhead]

27 October 2026

PRIVATE & CONFIDENTIAL

1
Harbourview Logistics Pty Ltd
Level 3, 40 Wharf Road
Pyrmont NSW 2009
Australia

By email: accounts@harbourview.example.com

2
Our ref: CAS-01000-B5K7R0
File no:
Contact: Vivek Pandagre,
Email: Vivek@d365csp.com

3
Dear ,

CAS-01000-B5K7R0 - Harbourview Logistics v Pacific Freightlines - Breach of Haulage Agreement

We write to update you on the progress of your matter.

[Body of letter]

Please contact us if you have any questions.

Yours sincerely,

Vivek Pandagre

· Vivek@d365csp.com

14

Clients

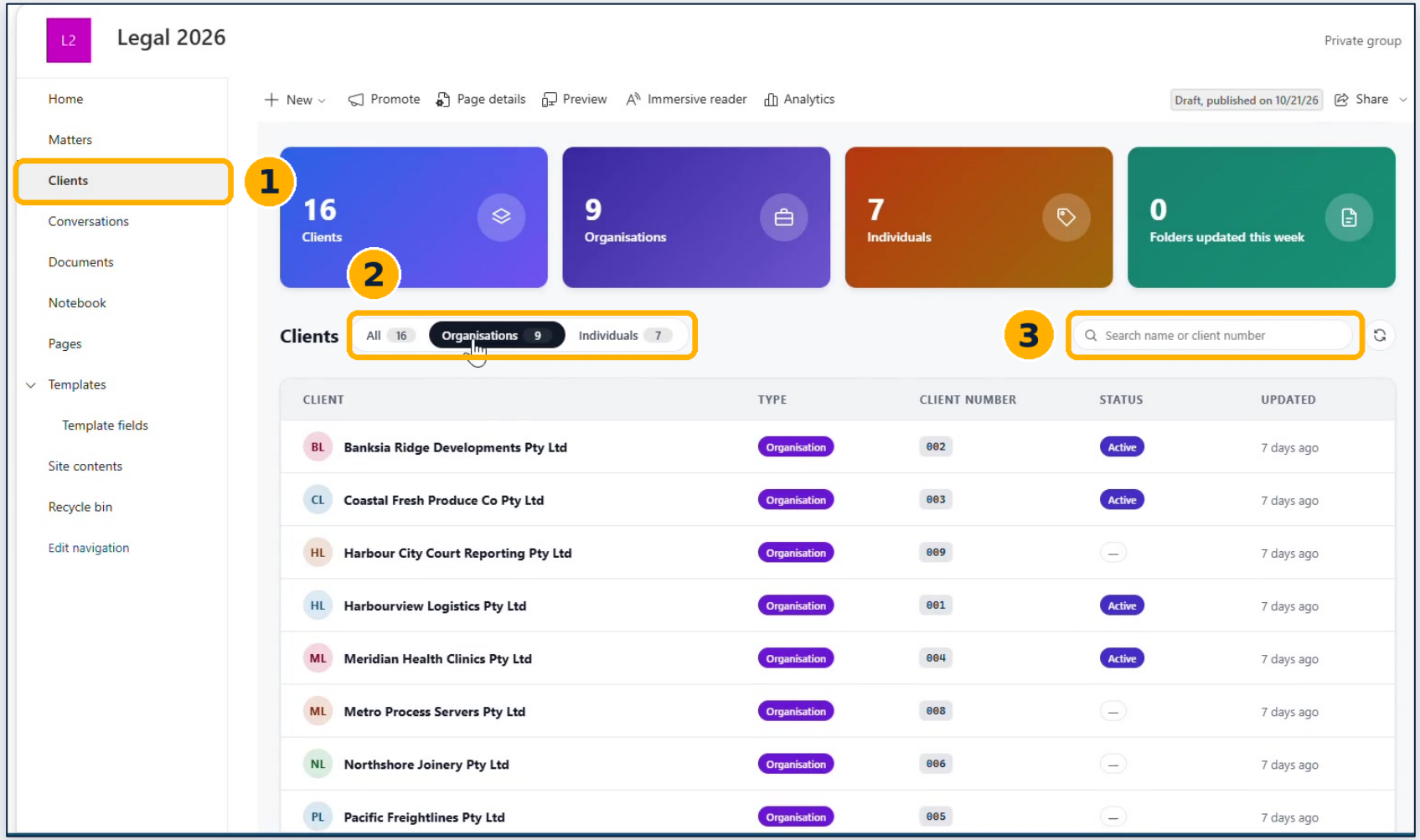
KYC and client papers live **here**.

Steps:

1. Click **Clients** in the left menu
2. Filter **All**, **Organisations** or **Individuals**
3. Search by name or client number, then click a client

Note: A contact is listed only when **Is client** is ticked in Dynamics 365.

Organisations are accounts and individuals are contacts in Dynamics 365.



15

Template Fields

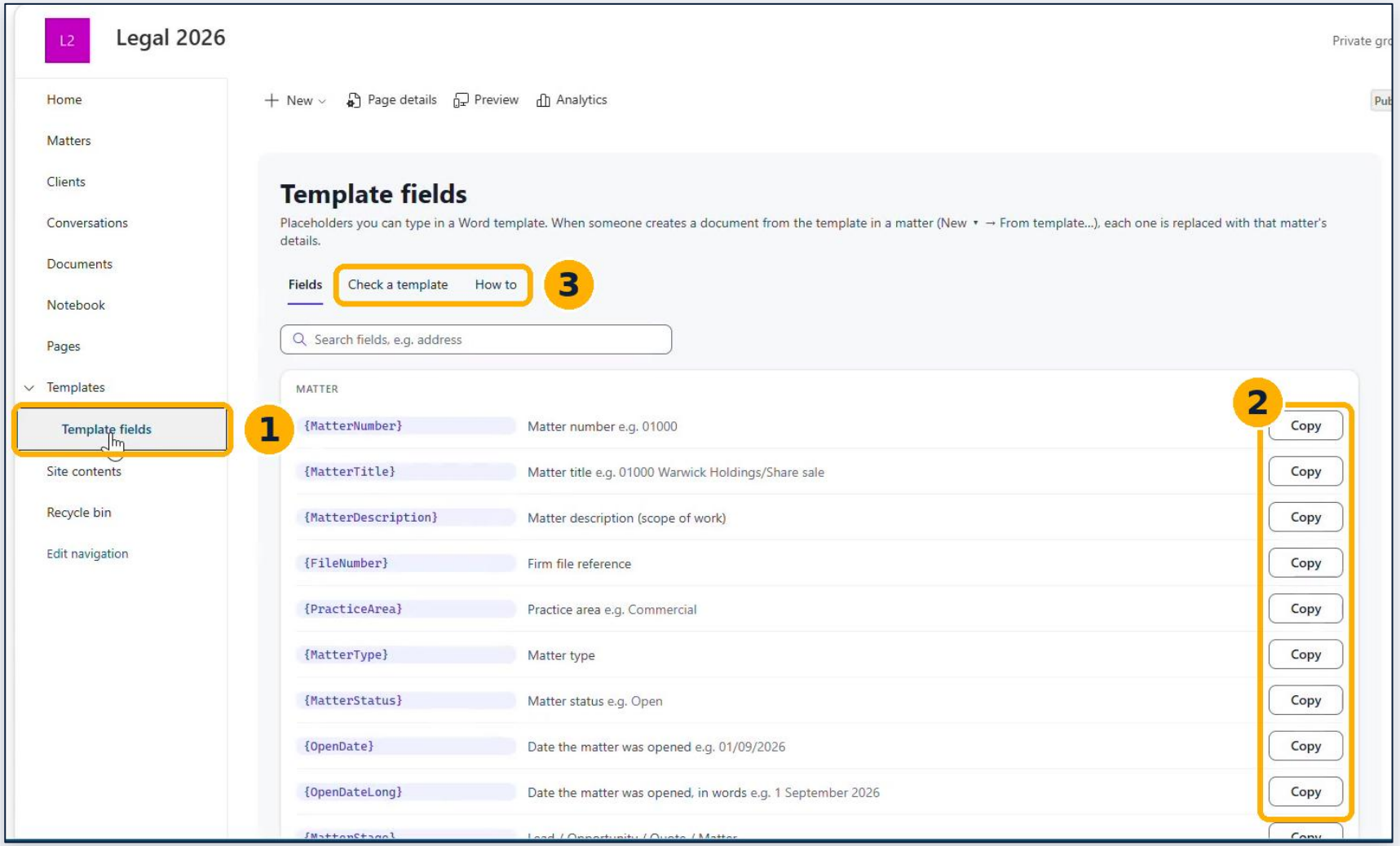
Placeholders for template **authors**.

Steps:

1. Click **Template fields** under Templates
2. Click **Copy** next to a field and paste it into Word
3. Use **Check a template** to test it, and **How to** for upload steps

Note: Names must match exactly, including capitals. Save as .docx.

A template is a Word document with placeholders such as {ClientName}.



Tips for the Legal DMS

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Three things worth remembering.

Search first

Search documents on the Matters page finds a file in any matter, even if you don't know which one.

Check the tags

AI suggests **document type** and **confidentiality**. Change anything wrong before you click Upload.

Deleted is not gone

Deleted files go to the site's **Recycle bin** and can be restored from there.

Can't see a matter? You may not have access in Dynamics 365, or its folder isn't created yet. Open the matter's Documents tab in Dynamics 365 once.