

Using the File Reference Generator

iLaw Case Management

The File Reference Generator lets you reference matter with a sequential alpha-numeric that can be set to take over from your current referencing system. The FNG is set to work on each iLaw user license that you have.

There are some more popular form of file references that iLaw can be set to run.

The most popular is this form - SMI.001.001

This reference is made up of three part:

SMI : This is the first three letters of the surname smith.

001 : The first instance of the name of Smith

001 : The first matter for that client

Another example is Smit.D.001

This reference is again made of three parts.

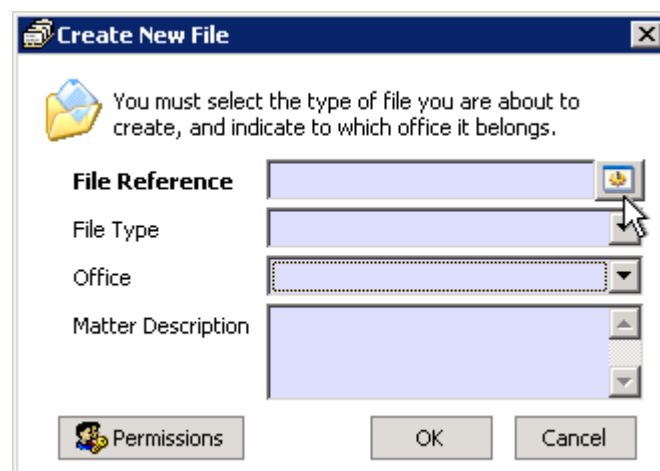
Smit : Here the first four letters are used like the Civil UCN

D : The initial of the client

001 : The first matter for that client

1. Click on **Create File Reference**

The Create New File box shows. You will notice an icon to the right of the **File Reference** field. This is the button to click on to show the **Generator File Reference** window.



2. Enter the surname or forename of the client you are entering a matter for. You will see that any matches for either surname or forename will show in the central part of the screen. You will also be shown how many matches there have been.

If you see a match to the client you are entering a new matter for (the DOB will always be the best detail to use for this) then select the entry. You will notice that **Existing Client, create new matter** becomes selected in the bottom left of the screen.

Check the next sequential file reference number that the client will have and then click on **Create**.

Type the clients surname and forename below, iLaw will then show any clients with a similar name which the firm has acted for.

Decide if this a new or existing client by selecting the appropriate radio button, iLaw will then generate the appropriate file reference. Click CREATE and the new file will be made.

Client Details

Surname: [Smith] Forename: []

Matches found: 122 matches found

Surname	Forname	DOB	PostCode	# of Matters
Smith	Albert	25/05/1948		1
Smith	Abi	06/06/1986		1

Existing Client, create a new matter
 New Client, first matter

File Reference: [SM001001] **Create**
Cancel

If there are no matches, check the File Reference that will be given, and then click on **Create**.