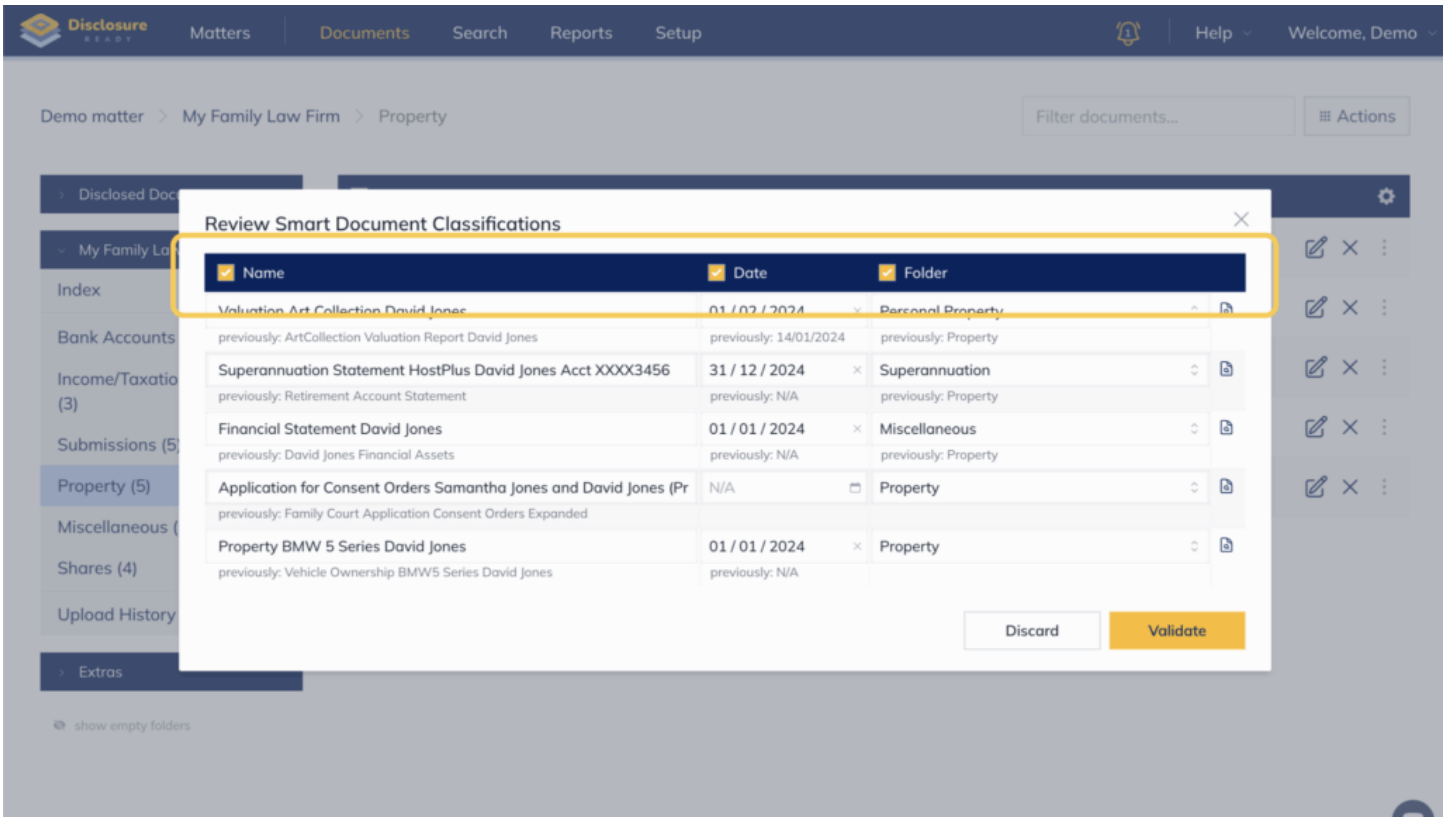
How to use the Smart Classification feature

AI Matter Intelligence · https://disclosureready.us.legalready.ai/knowledge/how-to-use-the-smart-classification-feature/

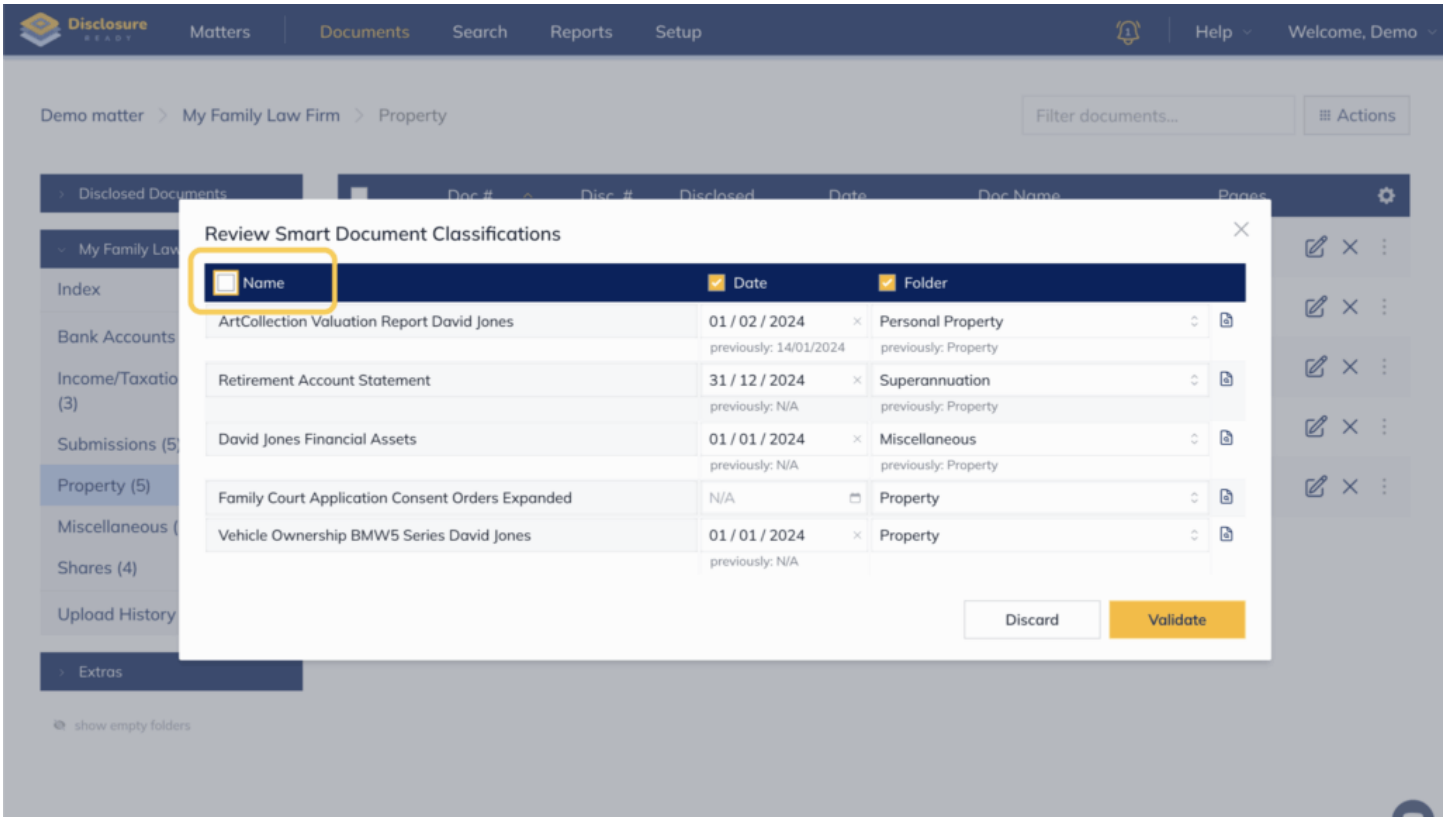
The Smart Classification feature reduces admin work by automatically suggesting a document name, date, and destination folder for the files you upload. Watch the video below to see how it works.

Embedded media: https://player.vimeo.com/video/1086340382?h=842c783ebe&dnt=1&app_id=122963

When validating Smart Classification suggestions, you can choose to keep all suggestions or bulk-unselect suggestions by column (Name, Date, or Folder).



In the example below, the "Name" column has been unselected to retain the original file names:


Disclosure
Matters
Documents
Search
Reports
Setup
Help
Welcome, Demo
Demo matter
My Family Law Firm
Property
Filter documents...
Actions
Disclosed Documents
Doc #
Disc. #
Disclosed
Date
Doc Name
Pages
My Family Law
Index
Bank Accounts
Income/Taxatio
(3)
Submissions (5)
Property (5)
Miscellaneous (
Shares (4)
Upload History
Extras
show empty folders
Review Smart Document Classifications
Name
Date
Folder
ArtCollection Valuation Report David Jones
01 / 02 / 2024
previously: 14/01/2024
Personal Property
previously: Property
Retirement Account Statement
31 / 12 / 2024
previously: N/A
Superannuation
previously: Property
David Jones Financial Assets
01 / 01 / 2024
previously: N/A
Miscellaneous
previously: Property
Family Court Application Consent Orders Expanded
N/A
Property
Vehicle Ownership BMW5 Series David Jones
01 / 01 / 2024
previously: N/A
Property
Discard
Validate