

Chapter 3 File

This section enables you to record a new file (open file), find file, update of file details, approval of files, closure of files, update of file opening balance and change file type.

In This Chapter:

3.1 Create New File

3.2 Manage File

3.3 Copy File Details

3.4 Copy File Details

Copy From

Search

File Master - Search

File No. :

File Type : (All) ▼

File Date (From) : Date in text ▼

File Date (To) : Date in text ▼

Subject :

File Status : (All) ▼

PIC : (All) ▼

File Tag : (All) ▼

File Group : (All) ▼

Department : (All) ▼

Client Name :

Client ID No.* : New/Old IC No./Passport/Com. Reg. No.

Client Category : (All) ▼

Select & Close

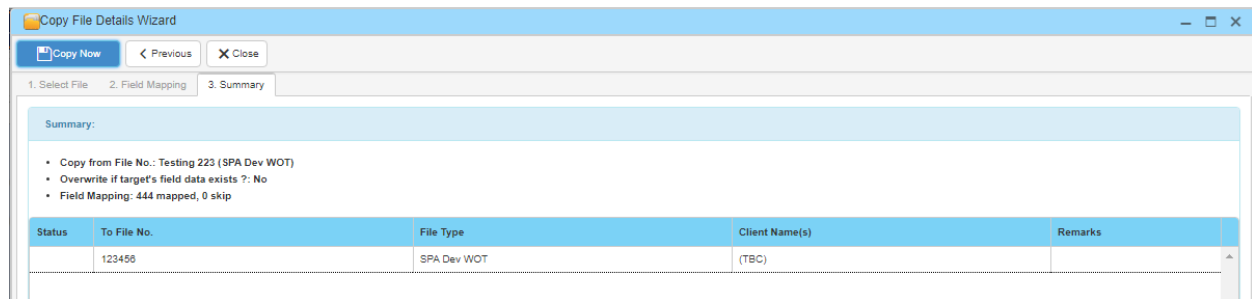
Drag a column header and drop it here to group by that column

#	R...	File No.	S...	Fil...	File Type	Op...	Client Name(s)	Subject
<input checked="" type="checkbox"/>	1 ★	2	0002	KIV	23/Nov/2...	Additional loan	0.00	Catherine
<input type="checkbox"/>	2 ★	0	Testing 223	KIV	19/Jan/2...	SPA Dev WOT	0.00	Maggie Tan

- Select a file by click on checked box first then click “Select & Close” to get the details inside the file which want to copy.

- Then click “Add Files” to select the file that wants to paste the details from the files that choose at previous.

- After check all data mapping click “Next”.



- Click “Copy Now” to done the process and the selected files will contain the file details inside the file from “Copy From”.

3.5 Manage File Document

3.6 Close File**3.7 Undo Close File****3.7 Lock File****3.8 Undo Lock File**

3.1 Create New File

This option enables you to create a new file. Moreover, the file must contain at least 1 client record and you cannot open a file without selecting P.I.C (Person in Charge), Department and File No. You can open a file while blank other than 3 of that, but it is not advisable.

- To open New File, on the **SmartLeg@l** navigation, click **File** and go to **New File Master** create New File window will appear as below.

New File Master – New File Wizard– General

Figure: New File – General


1. Select a file type from combo box.
2. Enter the Subject Matter is advisable.
3. Select a file group.
4. Select file status from combo box
5. You may select a Task Template based on the selection provided as figure shown.




6. Task's Assign to you can choose to assign who in the list

Task Template: SPA With Title With Consent (Act for Pur...)

Tasks' Assign To: (Template Default)


File No. Format: (Template Default)


File No.: 


 Add Client  Remove  New Client

Default?	Role	Client

7. Select File No. Format to decide the File No.
8. Choose person in charge, as example below the person in charge is 'sa'.

P.I.C.: 

Department: 

Day: 14 / Client: 

Super Administrator

Alex - Alex Tam

Jay - Jay C.W.

Sa - Super Administrator

Taryn - Taryn

9. Add Client to the file at bottom, when you click 'Add Client' you can search your client as 'Figure: New File – Add Client' shown. If no Client click 'New Client' can create New Client as refer to Chapter 1 Client 1.1 New Client. Click 'Remove' to remove client from the client list.

New File Wizard

> Next < Previous X Cancel ☒ Open file record after save

1. General 2. Search Client

File Type: Search

Subject Matter: Client Code: Client Name: Register Date (From): Date in text

Register Date (To): Date in text Client Category: (All) Client ID No.: New/Old IC No./Passport/Com. Reg. No.

Contact Info.: Tel No./Mobile No./Fax No./Email Client Tag: (All) Branch/Office:

Client's Status: ☒ Active ☐ In-active File No.:

Select & Close

Drag a column header and drop it here to group by that column

Client Code	Client Name	C...	Register ...	Com. Re...	New IC No.	Office/Br...	Remark
No records available.							


 Add Client

Figure: New File – Add Client

The screenshot shows the 'New File Wizard' window with the 'General' tab selected. The 'File No.' field is highlighted with a red circle. Below the form fields is a table of added clients.

Default?	Role	Client Code	Name	Category	New IC/Reg. No.	Office/Branch
<input checked="" type="checkbox"/>	Client	C/C/280600	Catherine	Client	12345678	
<input type="checkbox"/>	Client	C/TCH/280620	Tey Chee Hong	Client	36556	
<input type="checkbox"/>	Client	C/B/280618	Bosku	Client		

Figure: New File – Added Clients

Note: The client with the '**Default**' tick, mail merge details like address will fill with the client with tick as default. For instance, 'Figure: New File – Added Clients', the **Default** tick Catherine as default so that the information will fill as Catherine's details as default

New File Master – New File Wizard – Data Mapping

- The **Data Mapping** is mapping client's character like borrower, vendor and other information mapping
- To make your life easier you can click 'Auto-Mapping' and click 'Clear All Mapping' to delete all the mapping made.
- You can change the **File Type** by click '**Previous**' and go back to **General** to change it.
- In case of, because there may be multiple clients inside a file master, and different person playing a different role so that, data mapping is use to make to role playing more clearly. (For example, Catherine is a purchaser, then map the role of Catherine at purchaser, as well as Tey Chee Hong is a Vendor and ABC Company is a developer so that map them at their role)

Section	Field Name	Client Mapping
Purchaser Details	Purchaser Details > Purchaser Name	Catherine (12345678)
Purchaser Details	Purchaser Company Details > Purchaser Company Name	
Purchaser Details	Purchaser Company Details > Purchaser Director Name	
Vendor Details	Vendor Detail > Vendor Name	Tey Chee Hong (36556)
Vendor Details	Vendor Company Details > Vendor Company Name	ABC company (325)
Vendor Details	Vendor Company Details > Vendor Director Name	
Vendor Bank	Vendor Bank	
Vendor Bank	Vendor Bank Corresp Tel No	
Developer Details	Developer Name	ABC company (325)
Proprietor Details	Proprietor > Proprietor Name	
Borrower Details	Borrowers Details > Borrower Name	Catherine (12345678)
Borrower Details	Borrower Company Details > Borrower Company Name	
Borrower Details	Borrower Company Details >	

Figure: New File – Data Mapping

New File Master – New File Wizard – Summary

- After finish with the **General** and **Data Mapping** click ‘**Next**’ and it will go to generate a **Summary** about the New File you just created and click ‘**Save**’.

Summary:

- File No.: SPA/SS/WT/001
- File Type: SPA SS WT
- File Status: KIV
- PIC: Sa
- Client(s): Catherine (12345678), Tey Chee Hong (36556), ABC company (325)
- Data Mapping: 5

Click "Save File" button to save the details.

Figure: New File - Summary

3.2 Manage File

This option enables you to add, edit, and delete a file. It also allows you to keep track of file details and all related information.

- To open Manage File, on the **SmartLeg@I** navigation, click **File** and go to **Manage File** then search the file you wish to modify.

Manage File

- Search the file you wish to manage through type the search criteria or search by advanced.
- To start a new search or to clear the search results, click '**Clear**'.

The screenshot shows the 'Manage File - Search' interface. At the top, there are tabs for 'New File Master' and 'File List Report'. Below this is a search bar with 'Search' and 'Advanced' options. The search form includes several fields: File No., Subject, File Group, Client Category, File Type, File Status, Department, File Date (From/To), PIC, File Tag, and Client ID No. There are also buttons for 'Clear' and 'Search'.

Figure: Manage File – Search

Advanced Search File

- This function can be used to find a file by searching other information that is not captured in the 'General' section.
- Define search criteria:
 - **Field** - Choose the field you want to search.
 - **Condition** - Search condition
 - **Value** - Type in the detail you want to find.
- Click '**Add to list**', to define more than one criteria.
- Click '**Find**', search results will be displayed at search record list. You can open an item in the search results list by double-clicking.
- To start a new search or to clear the search results, click '**Clear**'.
- Click '**Export**' to print the desired search results in txt, excel or html format.

The screenshot shows the 'Manage File - Advanced' search interface. It features a table with three columns: 'Field', 'Condition', and 'Value'. The 'Field' column has a dropdown menu with 'File Type' selected. The 'Condition' column has a dropdown menu with 'Contains' selected. The 'Value' column has a text input field. There is an 'Add Criteria' button and a 'Search' button.

Figure: Manage File – Advanced

- For example, I add the file type, SPA SS WT in advanced search

New File Master File List Report

Search Advanced File Master - Search

File Type: SPA SS WT

Field [File Data] (All Fields) Condition Contains Value

File Type Is (Exactly) SPA SS WT Search

Delete Batch Merge Export... Result Per Page: 30 of 300

Drag a column header and drop it here to group by that column

	File No.	Run...	Stat...	File D...	File Type	Client Name(s)	Openi...	Subject
	0002	2	KIV	22/Oct/2020	SPA SS WT	CHAI SOO CHOONG	0.00	
	LAW/TEST/0001	0	KIV	14/Oct/2020	SPA SS WT	Tey Chee Hong, ABC company	0.00	Condo 400k
	SPA/SS/WT/001	0	KIV	14/Oct/2020	SPA SS WT	Catherine, Tey Chee Hong, ABC company	0.00	Test File Bk
	testing1234	0	KIV	15/Dec/2019	SPA SS WT	AW SIEO LEY	0.00	
	SPA 0045	0	KIV	09/Dec/2019	SPA SS WT	Shahurudin	0.00	SPA
	test1	0	KIV	07/Dec/2019	SPA SS WT	Ahmad Bin Ali Salam	0.00	SPA
	test1000	0	KIV	07/Dec/2019	SPA SS WT	Ahmad Bin Ali Salam	0.00	SPA
	test10001	0	KIV	07/Dec/2019	SPA SS WT	Ahmad Bin Ali Salam	0.00	SPA
	SPA 015	0	KIV	06/Dec/2019	SPA SS WT	Ahmad Bin Ali Salam, CHAI SOO CHOONG	0.00	SPA
	SPA 0014	0	KIV	02/Dec/2019	SPA SS WT	Melissa	0.00	
	SPA 008	0	KIV	25/Nov/2019	SPA SS WT	Low Jina Hena, Catherine Yap	0.00	SPA

- It will appeal all file type with SPA SS WT
- Besides, I add more criteria like contain 004, then it shall shown the file type with SPA SS WT and contain 004

New File Master File List Report

Search Advanced File Master - Search

File Type: SPA SS WT

Field [File Data] (All Fields) Condition Contains Value

File Type Is (Exactly) SPA SS WT
[File Data] (All Fields) Contains 004 Search

Delete Batch Merge Export... Result Per Page: 30 of 300

Drag a column header and drop it here to group by that column

	File No.	Run...	Stat...	File D...	File Type	Client Name(s)	Openi...	Subject
	SPA 007	0	KIV	21/Nov/2019	SPA SS WT	Raman	0.00	SPA
	0001	1	KIV	07/May/2019	SPA SS WT	AW SIEO LEY	0.00	test
	SPA 004	0	KIV	25/Oct/2018	SPA SS WT	Catherine	0.00	

Note: You can straightly type the File No. to search the file

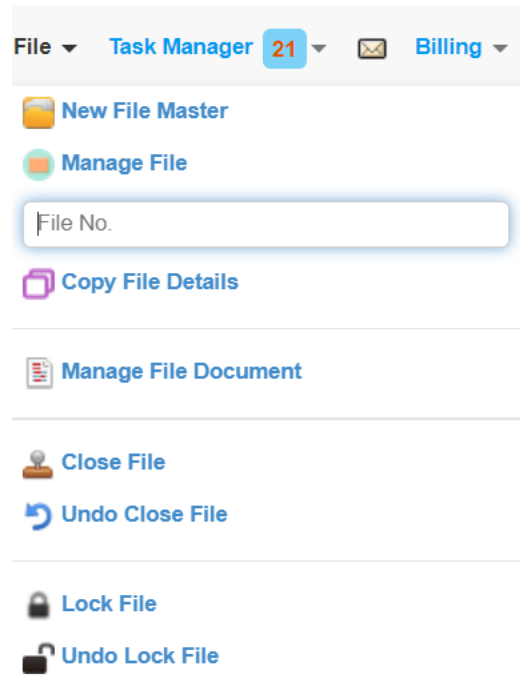


Figure: File – File No.

Searched Result

- Click **'Search'** once, to show all Files
- The Searched result will appear at below, otherwise it will shown no record available if the file you searched do not exist.
- Click **'Delete'** to delete the selected record.
- Click **'Export'** to print the desired search results in txt, excel or html format.

The screenshot shows the 'File Master - Search' interface. At the top, there are tabs for 'New File Master' and 'File List Report'. Below this is a search bar with 'Advanced' selected. The search filters include: File No. (empty), File Type (All), Subject (empty), File Status (All), File Date (empty), Person In Charge (All), Client Name (empty), and Client Category (All). There are 'Search' and 'Clear' buttons. Below the filters, there are buttons for 'Delete', 'Batch Merge', and 'Export...'. A 'Result Per Page' dropdown is set to 30, showing 'of 300' records. Below this is a table with columns: File No., Run..., Status, File Date, File Type, Client Name(s), Openin..., and Subject. The table contains 10 rows of data, including records for 'C/B/280618280619/2020/10/...', 'CSC280617/2020/06/29/CSC', 'testing1234', 'SPA 0045', 'test1', 'test1000', 'test10001', 'SPA 015', and 'SPA 0014'.

Figure: Manage File – Search All Files

The screenshot shows the 'File Master - Search' interface with search filters filled in: File No. (SPA 004), File Type (All), Subject (empty), File Status (All), File Date (empty), Person In Charge (All), Client Name (Catherine), and Client Category (All). There are 'Search' and 'Clear' buttons. Below the filters, there are buttons for 'Delete', 'Batch Merge', and 'Export...'. A 'Result Per Page' dropdown is set to 30, showing 'of 300' records. Below this is a table with columns: File No., Run..., Stat..., File D..., File Type, Client Name(s), Openi..., and Subject. The table contains 1 row of data for 'SPA 004' with status 'KIV', file date '25/Oct/2018', file type 'SPA SS WT', client name 'Catherine', and openin... '0.00'.

Figure: Manage File – Search Result

- After the file you searched appear, you can choose to view and manage to edit those details by double-clicking the record.

SPA 004

File No.: SPA 004

File Type: SPA SS WT

Subject:

Department: Conveyancing

Agent Commission:

Control Account: 300-0001 - Trade Debtor

File Date: 25/Oct/2018

Proposed Close File:

File Group: Conveyancing

File Status: KTV

PIC:

Staff Incentive:

Running No.:

Partner:

Default?	Role	Client Code	Name	Category	New IC/Reg. No.	Office/Branch
<input checked="" type="checkbox"/>	Client	C/C/280600	Catherine	Client	12345678	

File's Mailing List:

	Client Name	Contact Name	Tel. No.	Mobile No.	Fax No.	Email
<input type="checkbox"/>	Catherine	(Mr) Tey	03234567891	0234567891		
<input type="checkbox"/>	Catherine	(Mr) Bossku	03123456789	0123456789		

Figure: Manage File – Search Result, File Info

File Details

- Click 'File Details' to fill in the required details.

SPA 004

Edit File Details Close

Figure: Manage File – File Details option

- The File Type must be defined by selecting the appropriate file type before you proceed

SPA 004

File Type: SPA SS WT

Property Purchase Price

Purchase Price: 600,000.00

Purchase Price (In Text): Ringgit Malaysia Six Hundred Thousand

Purchase Price BM In Text: Ringgit Malaysia Enam Ratus Ribu

Property Particulars

SPA General

Purchaser Details

Vendor Details

Vendor Bank

Developer Details

Proprietor Details

Borrower Details

Borrower Bank

Loan Amount

Loan General

Loan Islamic

Guarantor Details

Redemption Details

Purchaser Solicitor

Vendor Solicitor

SPA Solicitor

Refinance Details

Previous Financier

Master Charge Bank

Purchaser Bank

AOP Branch

Figure: Manage File – File Details

- **Copy function** in file details
- When you click the icon at the navigation side, a selection menu as shown in 'Figure: Copy' below will show up.

The screenshot shows a software interface for 'Property Purchase Price'. The top bar includes buttons for 'Save', 'Cancel', a copy icon (circled in red), 'Merge @Vars', 'Preview Form', and 'Close'. Below the top bar, the 'File No.' is 'SPA 004' and the 'File Type' is 'SPA SS WT'. The sidebar on the left lists various categories: Property Purchase Price, Property Particulars, SPA General, Purchaser Details, Vendor Details, Vendor Bank, Developer Details, Proprietor Details, Borrower Details, Borrower Bank, Loan Amount, Loan General, Loan Islamic, Guarantor Details, Redemption Details, Purchaser Solicitor, Vendor Solicitor, SPA Solicitor, Refinance Details, Previous Financier, Master Charge Bank, Purchaser Bank, and AOP Branch. The main area displays the 'Property Purchase Price' form with fields for 'Purchase Price' (600,000.00), 'Purchase Price (In Text)' (Ringgit Malaysia Six Hundred Thousand), and 'Purchase Price BM In Text' (Ringgit Malaysia Enam Ratus Ribu).

- This function allows you to:
 - a) Copy From: copy file details from another file.
 - b) Copy To: copy file details to another file.

The screenshot shows a 'Copy' selection menu. It has a top bar with buttons for 'Copy From...', 'Copy To...', 'Preview Form', and 'Close'. Below the top bar, there are two options: 'Copy From...' and 'Copy To...'. At the bottom, there are two checkboxes: 'Show/Hide Merge Field Name' and 'Show/Hide Field's Hint'.

Figure: Manage File – Copy

Note: This function can only be used to files that are of the same file type.

Copy From...

- Select 'Copy From...' option. A 'File Data Copy Wizard' window will appear as shown below.

File Data Copy Wizard

> Next < Previous X Cancel

1. Select File 2. Field Mapping 3. Summary

Copy From:

File No.: 🔍

File Type:

Client Name(s):

To:

+ Add Files - Remove - Remove All

File No.	File Type	Client Name(s)
SPA 004	SPA SS WT	Catherine

- Click 🔍 to browse and select a file to copy from (e.g. SPA 004) and then double click.
- After that, 'Add Files' to copy from (e.g. SPA 004), for the To: (e.g. SPA/SS/WT/001)

File Data Copy Wizard

> Next < Previous X Cancel

1. Select File 2. Field Mapping 3. Summary

Copy From:

File No.: 🔍

File Type:

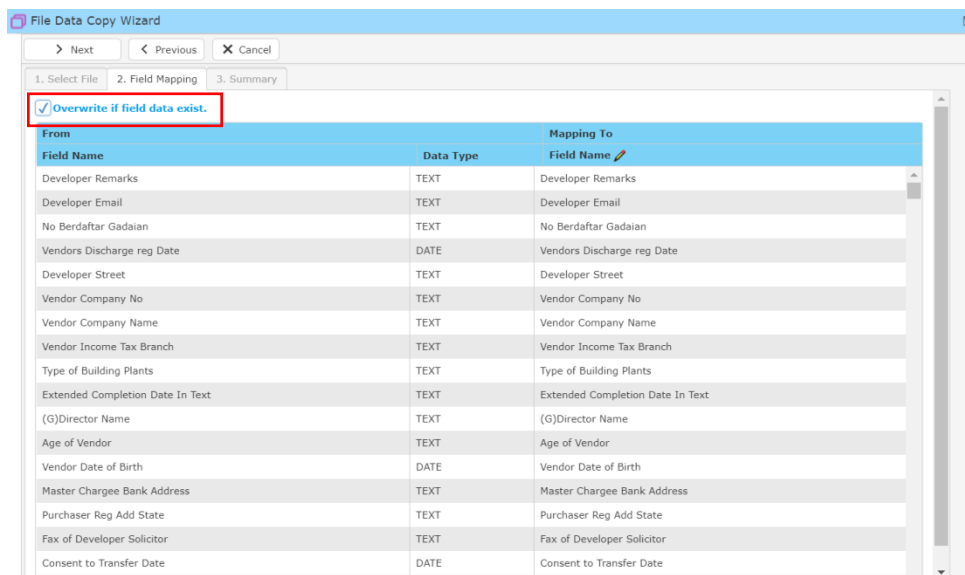
Client Name(s):

To:

+ Add Files - Remove - Remove All

File No.	File Type	Client Name(s)
SPA/SS/WT/001	SPA SS WT	Catherine ,Tey Chee Hong ,ABC company

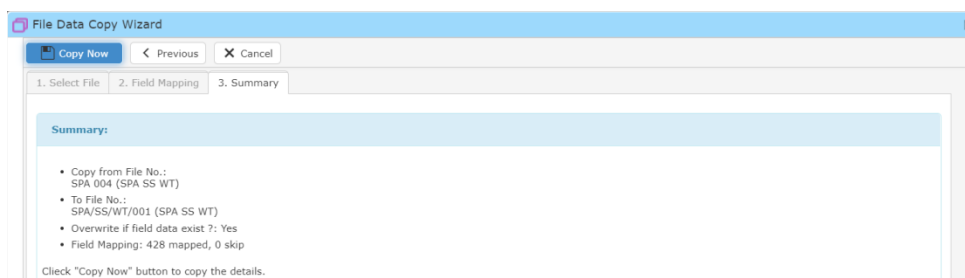
- Click 'Next' will go to Field Mapping
- To overwrite the existing file details by selecting 'overwrite all if field data exist'



The screenshot shows the 'File Data Copy Wizard' window at the 'Field Mapping' step. The 'Overwrite if field data exist.' checkbox is checked and highlighted with a red box. Below it is a table mapping fields from a source file to a target file.

From		Mapping To
Field Name	Data Type	Field Name
Developer Remarks	TEXT	Developer Remarks
Developer Email	TEXT	Developer Email
No Berdaftar Gadaian	TEXT	No Berdaftar Gadaian
Vendors Discharge reg Date	DATE	Vendors Discharge reg Date
Developer Street	TEXT	Developer Street
Vendor Company No	TEXT	Vendor Company No
Vendor Company Name	TEXT	Vendor Company Name
Vendor Income Tax Branch	TEXT	Vendor Income Tax Branch
Type of Building Plants	TEXT	Type of Building Plants
Extended Completion Date In Text	TEXT	Extended Completion Date In Text
(G)Director Name	TEXT	(G)Director Name
Age of Vendor	TEXT	Age of Vendor
Vendor Date of Birth	DATE	Vendor Date of Birth
Master Chargee Bank Address	TEXT	Master Chargee Bank Address
Purchaser Reg Add State	TEXT	Purchaser Reg Add State
Fax of Developer Solicitor	TEXT	Fax of Developer Solicitor
Consent to Transfer Date	DATE	Consent to Transfer Date

- Click 'Next' again then it will generate a summary



The screenshot shows the 'File Data Copy Wizard' window at the 'Summary' step. The 'Copy Now' button is highlighted. The summary text is as follows:


Summary:

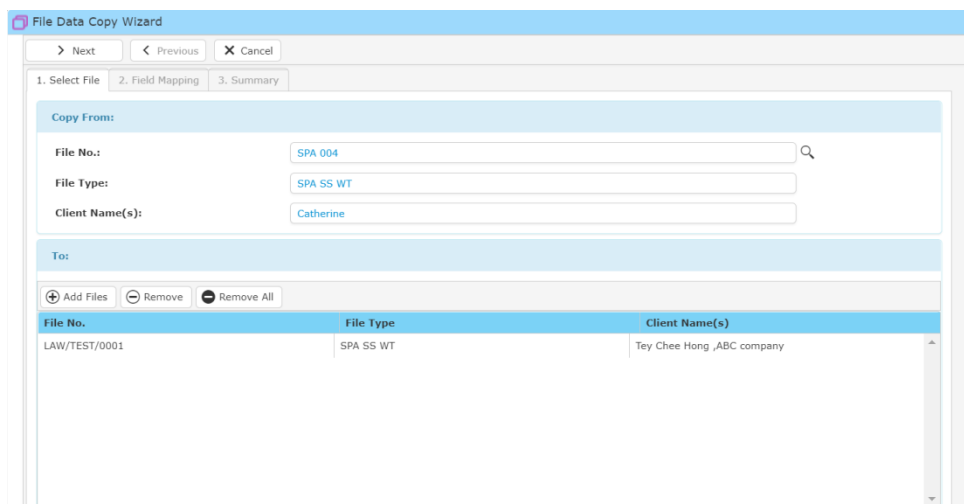
- Copy from File No.: SPA 004 (SPA SS WT)
- To File No.: SPA/SS/WT/001 (SPA SS WT)
- Overwrite if field data exist?: Yes
- Field Mapping: 428 mapped, 0 skip

Click "Copy Now" button to copy the details.

- Click 'Copy Now' to proceed the copy process

Copy To...

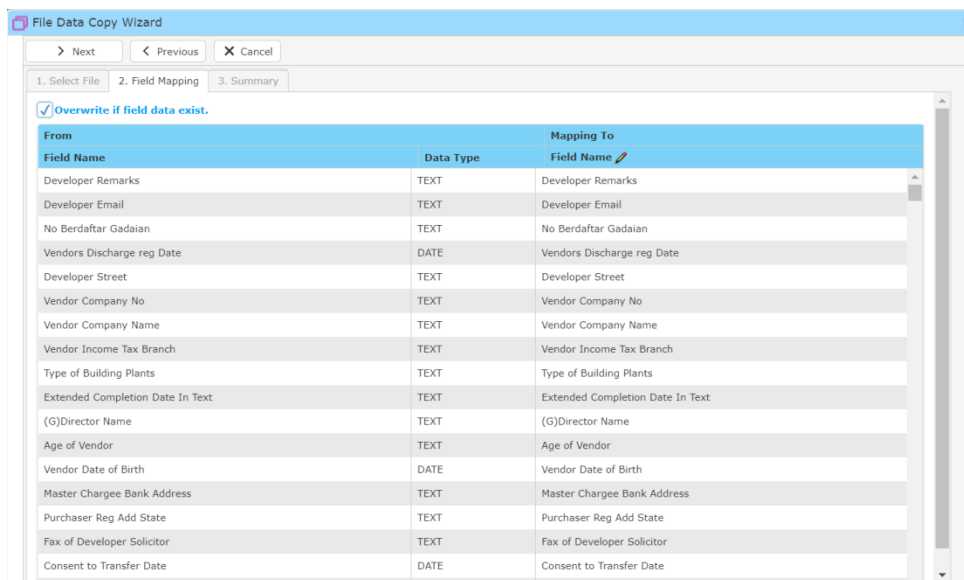
- Select 'Copy From...' option. A 'File Data Copy Wizard' window will appear as shown below.
- Click  to browse and select a file to copy from (e.g. SPA 004) and then double click.
- After that, 'Add Files' to copy from (e.g. SPA 004), for the To: (e.g. LAW/TEST/0001)



The 'File Data Copy Wizard' window is shown at Step 1: Select File. It has three tabs: '1. Select File', '2. Field Mapping', and '3. Summary'. The 'Copy From:' section contains three input fields: 'File No.' with the value 'SPA 004', 'File Type' with the value 'SPA SS WT', and 'Client Name(s)' with the value 'Catherine'. The 'To:' section has buttons for 'Add Files', 'Remove', and 'Remove All'. Below these is a table with the following data:

File No.	File Type	Client Name(s)
LAW/TEST/0001	SPA SS WT	Tey Chee Hong ,ABC company

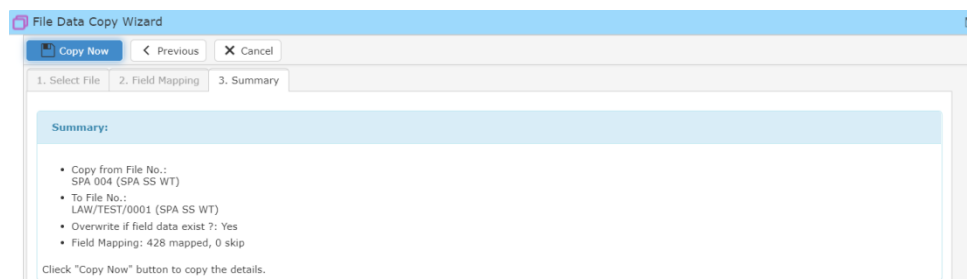
- Click 'Next' will go to Field Mapping
- To overwrite the existing file details by selecting 'overwrite all if field data exist'



The 'File Data Copy Wizard' window is shown at Step 2: Field Mapping. The '1. Select File' tab is still selected. The 'Overwrite if field data exist.' checkbox is checked. Below this is a table for field mapping:

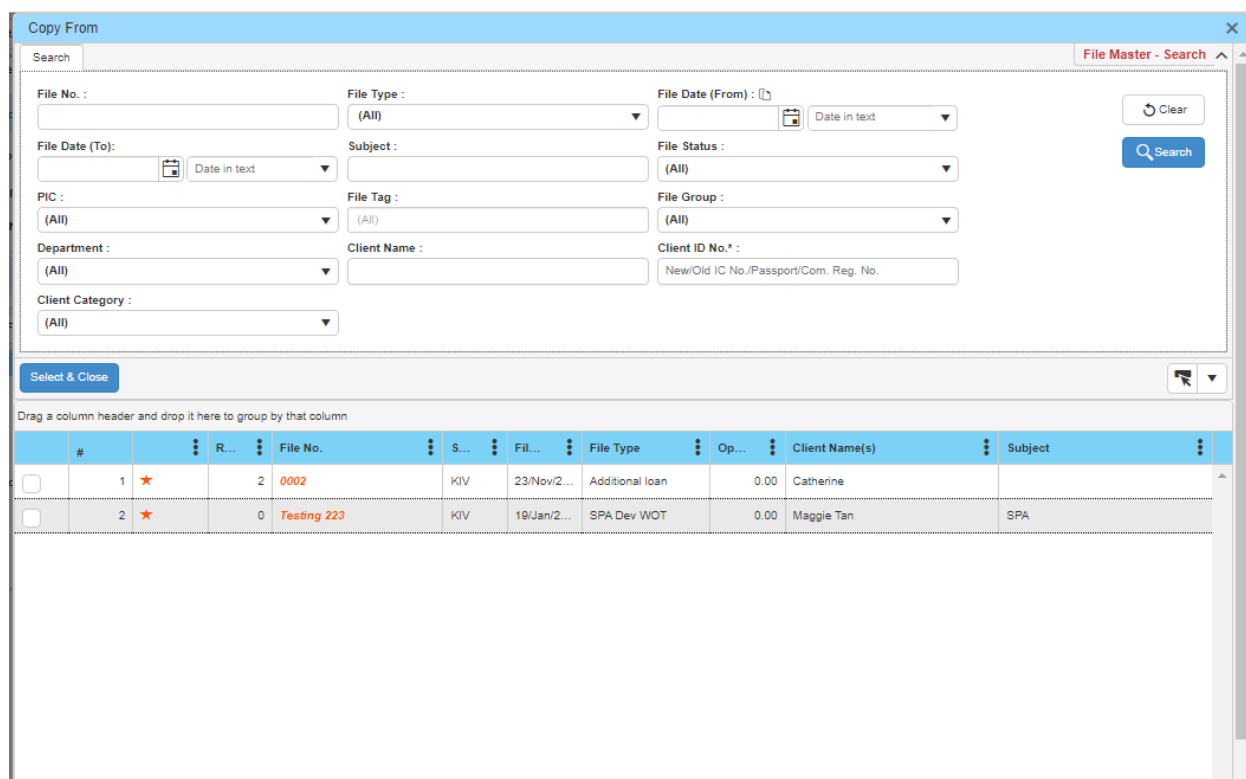
From Field Name	Data Type	Mapping To Field Name
Developer Remarks	TEXT	Developer Remarks
Developer Email	TEXT	Developer Email
No Berdaftar Gadaian	TEXT	No Berdaftar Gadaian
Vendors Discharge reg Date	DATE	Vendors Discharge reg Date
Developer Street	TEXT	Developer Street
Vendor Company No	TEXT	Vendor Company No
Vendor Company Name	TEXT	Vendor Company Name
Vendor Income Tax Branch	TEXT	Vendor Income Tax Branch
Type of Building Plants	TEXT	Type of Building Plants
Extended Completion Date In Text	TEXT	Extended Completion Date In Text
(G)Director Name	TEXT	(G)Director Name
Age of Vendor	TEXT	Age of Vendor
Vendor Date of Birth	DATE	Vendor Date of Birth
Master Chargee Bank Address	TEXT	Master Chargee Bank Address
Purchaser Reg Add State	TEXT	Purchaser Reg Add State
Fax of Developer Solicitor	TEXT	Fax of Developer Solicitor
Consent to Transfer Date	DATE	Consent to Transfer Date

- Click 'Next' again then it will generate a summary



- Click 'Copy Now' to proceed the copy process

3.4 Copy File Details



- Select a file by click on checked box first then click "Select & Close" to get the details inside the file which want to copy.

> Next < Previous X Close

1. Select File 2. Field Mapping 3. Summary

Copy From:

File No.: 🔍

File Type:

Client Name(s):

To:

File No.	File Type	Client Name(s)
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- Then click “Add Files” to select the file that wants to paste the details from the files that choose at previous.

Copy File Details Wizard

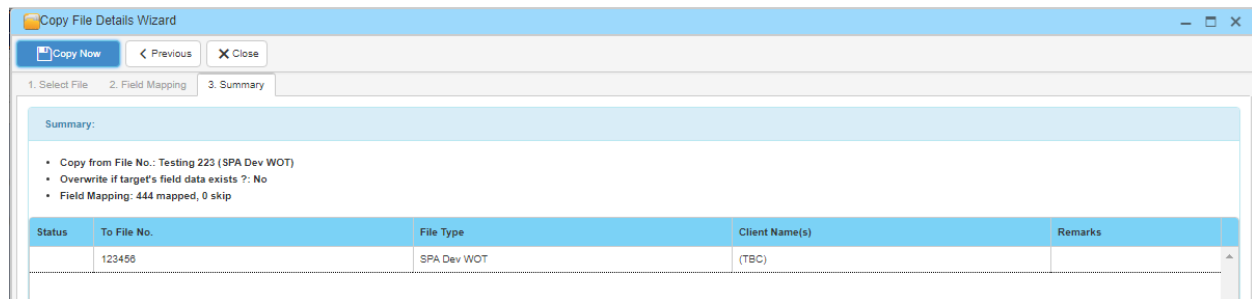
> Next < Previous X Close

1. Select File 2. Field Mapping 3. Summary

☐ Overwrite if target's field data exists
 ☐ Show selected only

From : SPA Dev WOT		Mapping To : SPA Dev WOT	
	Field Name	Data Type	Field Name
Property Purchase Price			
<input checked="" type="checkbox"/>	Purchase Price	CURRENCY	Purchase Price
<input checked="" type="checkbox"/>	Purchase Price (In Text)	TEXT	Purchase Price (In Text)
<input checked="" type="checkbox"/>	Purchase Price BM In Text	TEXT	Purchase Price BM In Text
<input checked="" type="checkbox"/>	Car Park Purchase Price	CURRENCY	Car Park Purchase Price
<input checked="" type="checkbox"/>	Car Park Purchase Price In Text	TEXT	Car Park Purchase Price In Text
<input checked="" type="checkbox"/>	Adjustment Rate 1	CURRENCY	Adjustment Rate 1
<input checked="" type="checkbox"/>	Adjustment Rate (Bank Negara)	CURRENCY	Adjustment Rate (Bank Negara)
Property Particulars			
<input checked="" type="checkbox"/>	Lawyer In Charge Name	TEXT	Lawyer In Charge Name
<input checked="" type="checkbox"/>	Lawyer In Charge IC	TEXT	Lawyer In Charge IC
<input checked="" type="checkbox"/>	staff email address	TEXT	staff email address
<input checked="" type="checkbox"/>	Date S&P Agreement	DATE	Date S&P Agreement

- After check all data mapping click “Next”.



- Click “Copy Now” to done the process and the selected files will contain the file details inside the file from “Copy From”.

3.5 Manage File Document

This option enables you to add, edit, and delete a document. It also allows you to keep track of document details and all related information.

- To open Manage File Document, on the **SmartLeg@1** navigation, click **File** and go to **Manage File Document** then search the document you wish to modify.

Manage File Document

- Search the document you wish to manage through type the search criteria or search by advanced.
- To start a new search or to clear the search results, click '**Clear**'.

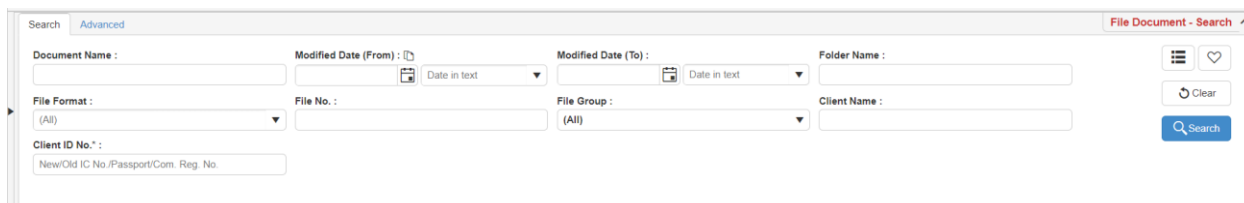
The screenshot shows a web application interface for searching file documents. At the top, there are two tabs: 'Search' and 'Advanced', with 'Advanced' currently selected. The main area contains several search criteria fields: 'Document Name' (text input), 'Modified Date (From)' (calendar icon and 'Date in text' dropdown), 'Modified Date (To)' (calendar icon and 'Date in text' dropdown), 'Folder Name' (text input), 'File Format' (dropdown menu with '(All)' selected), 'File No.' (text input), 'File Group' (dropdown menu with '(All)' selected), and 'Client Name' (text input). Below these, there is a 'Client ID No.' field with a placeholder text 'New/Old IC No./Passport/Com. Reg. No.'. On the right side, there are three icons: a list icon, a heart icon, and a 'Clear' button with a circular arrow icon. At the bottom right, there is a blue 'Search' button with a magnifying glass icon. The top right corner of the interface has a red header 'File Document - Search' with a small upward arrow.

Figure: Manage File Document

- Other than typing those Document Name and File No. **Modified Date** allows you to select the start date from calendar to the period you wish to view. And all the documents in between the date you selected will appeal

Figure: Manage File Document – Search with Modified Date

Searched Result

- Click '**Search**' once, to show all Documents
- The Searched result will appeal at below, otherwise it will shown no record available if the client you searched do not exist.
- Click '**Delete**' to delete the selected record.
- Click '**Export**' to print the desired search results in txt, excel or html format.
- Click '**Download(Zip)**' to download the zipped document.

	Document Name	File No.	Description	Folder Path	File Size	Modified Date
<input type="checkbox"/>	(1.0) Merge ABMB - FA (April 2015)pv1.docx	SPA 004		> ic > Bank Documents > old > ABMB	544 KB	09/Sep/2022 10:26 AM
<input type="checkbox"/>	(1.0) Merge ABMB - FA (April 2015)pv1.docx	SPA 004		> ic > Bank Documents > ABMB	551 KB	09/Sep/2022 10:26 AM
<input type="checkbox"/>	(10.0) Ltr of Authorisation RS (Master Title key in).docx	SPA 004		> ic > Bank Documents > ABMB	19 KB	09/Sep/2022 10:26 AM
<input type="checkbox"/>	(10.0) Ltr of Authorisation RS (Master Title key in).docx	SPA 004		> ic > Bank Documents > old > ABMB	19 KB	09/Sep/2022 10:26 AM
<input type="checkbox"/>	(10.0) Ltr of Authorisation RS.docx	SPA 004		> ic > Bank Documents > old > ABMB	19 KB	09/Sep/2022 10:26 AM
<input type="checkbox"/>	(10.0) Ltr of Authorisation RS.docx	SPA 004		> ic > Bank Documents > ABMB	19 KB	09/Sep/2022 10:26 AM

Figure: Manage File Document - Search All Document

- After the document you searched appeal, you can choose to edit, open with editor to edit the content and download the document.

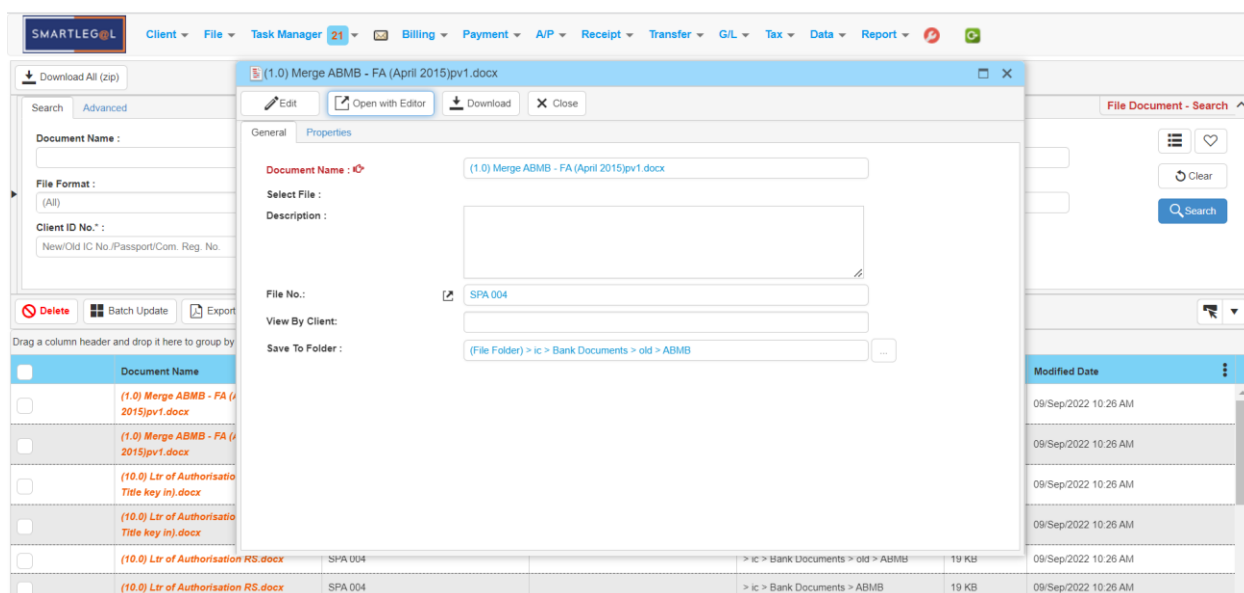


Figure: Manage File Document – Search Result, Document Info

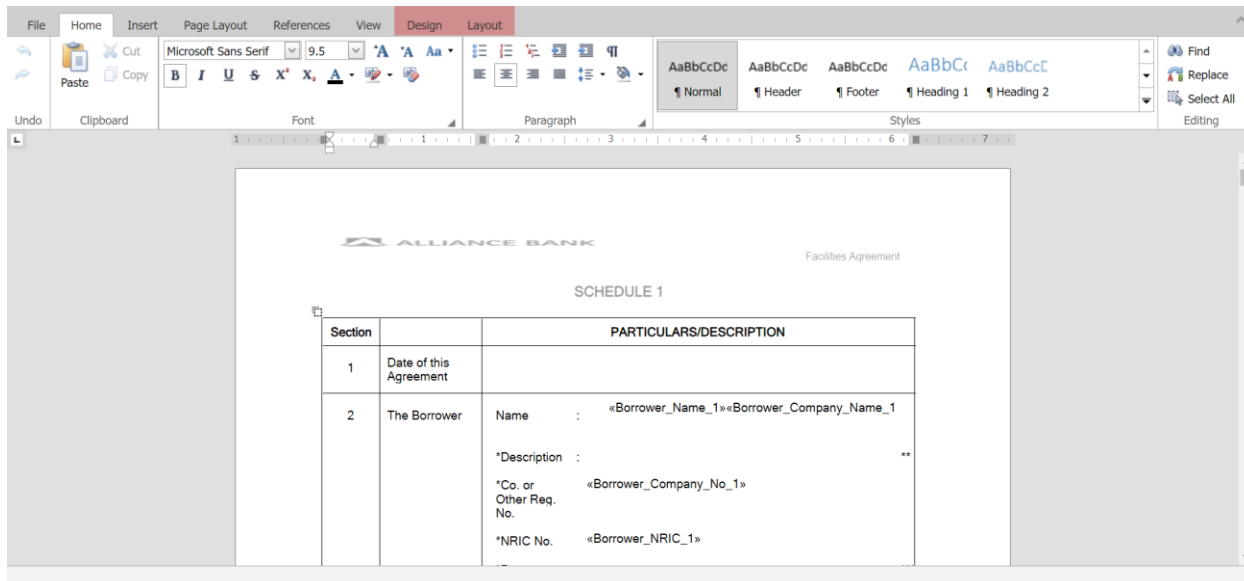


Figure: Manage File Document – Search Result, Document Info – Open with Editor

3.6 Close File

This option enables you to close a file. System will show all unclosed files by default.

- To open Close File, on the **SmartLeg@l** navigation, click **File** and go to **Close File** then search the file you wish to close.

Close File

- Search the document you wish to manage through type the search criteria
- To start a new search or to clear the search results, click '**Clear**'.

File Master - Close File

The screenshot shows a web-based search form titled 'File Master - Close File'. It includes a search bar at the top right. The form fields are organized into two columns. The left column contains: File No. (text), Subject (text), File Group (dropdown), and Client Category (dropdown). The right column contains: File Type (dropdown), File Date (From) and (To) (date pickers), File Status (dropdown), PIC (dropdown), File Tag (dropdown), Department (dropdown), Client Name (text), and Client ID No. (text with a placeholder). There are 'Clear' and 'Search' buttons on the right side of the form.

Figure: Close File

Searched Result

- Click '**Search**' once, to show all Files
- The Searched result will appear at below, otherwise it will shown no record available if the client you searched do not exist.
- Select the check box beside the selected file no.
- For batch processing, tick the column beside File No.
- System will take today's date as closing date. If your closing date is not today's date, you can select a '**File Close Date**'.
- Click '**Close File**'.
- Click '**Export**' to print the desired search results in txt, excel or html format.
- Click '**Delete**' to delete the selected record.

File Master - Close File

Search

File No.: File Type: (All) File Date (From): Date in text File Date (To): Date in text

Subject: File Status: (All) PIC: (All) File Tag: (All)

File Group: (All) Department: (All) Client Name: Client ID No.: New/Old IC No./Passport/Com. Reg. No.

Client Category: (All)

Drag a column header and drop it here to group by that column

	#		File No.	Sta...	File D...	File Type	Open...	Client Name(s)	Subject
<input type="checkbox"/>	1	★	42 DEIT/0042/Sa/23	KIV	30/Jan/2023	SPA SS WT	0.00	Choo Yin @ Choo Gan Yin, Catherine Yap	SPA
<input type="checkbox"/>	2	★	40 DEIT/0040/lawyer A/22	KIV	28/Nov/2022	SPA SS WT	0.00	(TBC)	
<input type="checkbox"/>	3	★	39 DEIT/0039/lawyer A/22	KIV	18/Jul/2022	SPA SS WT	0.00	test, Choo Yin @ Choo Gan Yin	Condo 500k
<input type="checkbox"/>	4	★	38 DEIT/0038/Sa/22	KIV	18/May/2022	SPA SS WT	0.00	Soo Way Ching, Catherine Yap	SPA
<input type="checkbox"/>	5	★	37 DEIT/0037/Sa/22	KIV	29/Mar/2022	SPA SS WT	0.00	Ali	SPA
<input type="checkbox"/>	6	★	36 DEIT/0036/Sa/22	KIV	22/Mar/2022	Litigation Hire Purchase	0.00	Public Bank Berhad	Hire Purchase
<input type="checkbox"/>	7	★	32 PCALAW/0032/Lawyers	KIV	09/Mar/2022	SPA Dev WOT	0.00	Catherine Yap	SPA

Figure: Close File – All Search

- After you selected the file you wish to close file, system will pop up and prompt a confirmation before you close the file.

SMARTLEG@L Client File Task Manager 21 Billing Payment A/P Receipt Transfer G/L Tax Data Report

File Master - Close File

Search

File No.: File Type: (All) File Date (From): Date in text File Date (To): Date in text

Subject: File Status: (All) PIC: (All) File Tag: (All)

File Group: (All) Department: (All) Client Name: Client ID No.: New/Old IC No./Passport/Com. Reg. No.

Client Category: (All)

Drag a column header and drop it here to group by that column

Are you sure you want to close the selected files?

Description	File Close Date	Status
DEIT/0042/Sa/23	22/Nov/2023	

☒ Close window after Successful execution

	#		File No.	Sta...	File D...	File Type	Open...	Client Name(s)	Subject
<input checked="" type="checkbox"/>	1	★	42 DEIT/0042/Sa/23	KIV	30/Jan/2023	SPA SS WT	0.00	Choo Yin @ Choo Gan Yin, Catherine Yap	SPA
<input type="checkbox"/>	2	★	40 DEIT/0040/lawyer A/22	KIV	28/Nov/2022	SPA SS WT	0.00	(TBC)	
<input type="checkbox"/>	3	★	39 DEIT/0039/lawyer A/22	KIV	18/Jul/2022	SPA SS WT	0.00	test, Choo Yin @ Choo Gan Yin	Condo 500k
<input type="checkbox"/>	4	★	38 DEIT/0038/Sa/22	KIV	18/May/2022	SPA SS WT	0.00	Soo Way Ching, Catherine Yap	SPA
<input type="checkbox"/>	5	★	37 DEIT/0037/Sa/22	KIV	29/Mar/2022	SPA SS WT	0.00	Ali	SPA
<input type="checkbox"/>	6	★	36 DEIT/0036/Sa/22	KIV	22/Mar/2022	Litigation Hire Purchase	0.00	Public Bank Berhad	Hire Purchase
<input type="checkbox"/>	7	★	32 PCALAW/0032/Lawyers	KIV	09/Mar/2022	SPA Dev WOT	0.00	Catherine Yap	SPA

Figure: Close File – Confirmation



- After you confirm to close the selected file, the pop up confirmation you show a green tick beside the file you closed to show that you successfully closed the file if you checked the box “Close window after Successful execution” the pop up window will automatically closed.

File Master - Close File

×

?

Are you sure you want to close the selected files?

	Description	File Close Date 	Status
	DEIT/0042/Sa/23	22/Nov/2023	

☐ Close window after Successful execution

Close

Cancel

Figure: Close File – Successfully Close File

3.7 Undo Close File

This option enables you to undo close a file.

- To open Undo Close File, on the **SmartLeg@1** navigation, click **File** and go to **Undo Close File** then search the file you wish to close.

Undo Close File

- Search the document you wish to manage through type the search criteria
- To start a new search or to clear the search results, click '**Clear**'.

File Master - Undo Close File

Figure: Undo Close File

Searched Result

- Click '**Search**' once, to show all Files
- The Searched result will appear at below, otherwise it will shown no record available if the client you searched do not exist.
- Select the check box beside the selected file no.
- For batch processing, tick the column beside File No.
- Click '**Undo Close File**'.
- Click '**Export**' to print the desired search results in txt, excel or html format.
- Click '**Delete**' to delete the selected record.

File Master - Undo Close File

File No.	Run...	Status	File Date	File Type	Client Name(s)	File ...	File ...	Subject
<input type="checkbox"/> DEIT/0042/Sa/23	42	Closed	30/Jan/2023	SPA SS WT	Choo Yin @ Choo Gan Yin, Catherine Yap	22/Nov/2...	user	SPA
<input type="checkbox"/> SPA 005	5	Closed	27/Aug/2012	SPA SS WT	(TBC)	25/Feb/20...	sa	Sale and Purchase Agreement
<input type="checkbox"/> RV2	0	Closed	27/Apr/2008	Litigation	(TBC)	25/Feb/20...	sa	Altec Industrial & engineering Supply S/B Vs GDEX-Express

Figure: Undo Close File – All Search

- After you selected the file you wish to undo close file, system will pop up and prompt a confirmation before you unclosed the file.

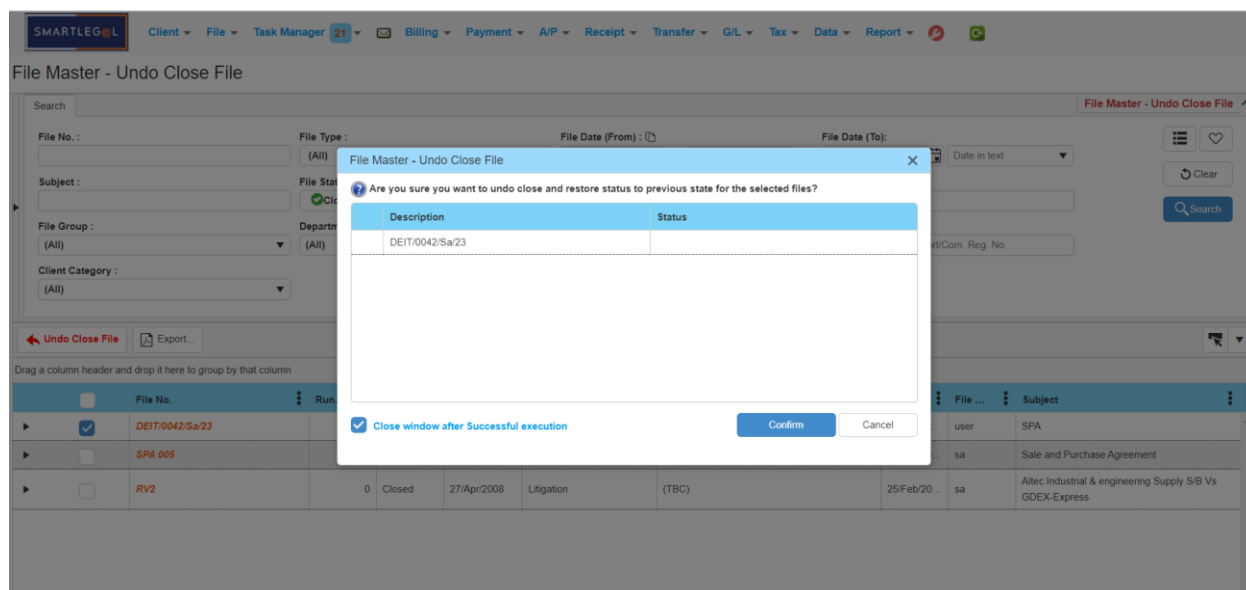


Figure: Undo Close File – Confirmation

- After you confirm to unclosed the selected file, the pop up confirmation you show a green tick beside the file you closed to show that you successfully undo close the closed file if you checked the box “Close window after Successful execution” the pop up window will automatically closed.

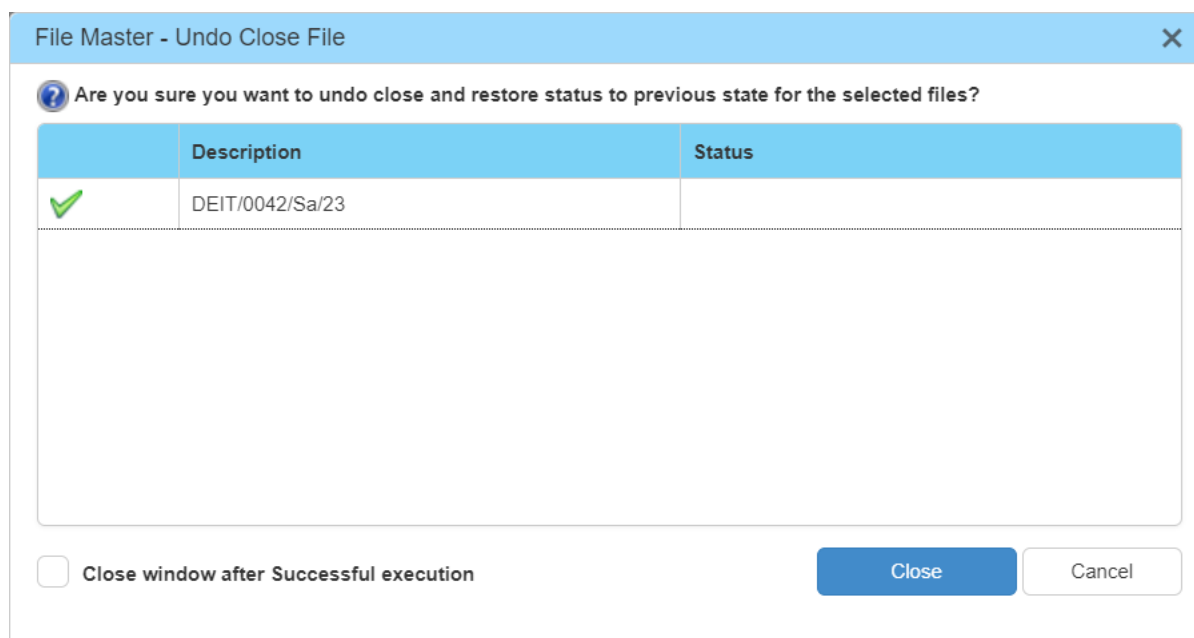


Figure: Undo Close File – Successfully Undo Close File

3.8 Lock File

This option enables you to lock a file. System will show all unlock files by default.

- To open Close File, on the **SmartLeg@l** navigation, click **File** and go to **Lock File** then search the file you wish to close.

Lock File

- Search the document you wish to manage through type the search criteria
- To start a new search or to clear the search results, click '**Clear**'.

Figure: Lock File

Searched Result

- Click '**Search**' once, to show all Files
- The Searched result will appear at below, otherwise it will shown no record available if the client you searched do not exist.
- Select the check box beside the selected file no.
- For batch processing, tick the column beside File No.
- System will take today's date as closing date. If your closing date is not today's date, you can select a '**File Close Date**'.
- Click '**Close File**'.
- Click '**Export**' to print the desired search results in txt, excel or html format.
- Click '**Delete**' to delete the selected record.

File Master - Lock File

Search

File No.: File Type: (All) File Date (From): Date in text File Date (To): Date in text

Subject: File Status: (All) PIC: (All) File Tag:

File Group: (All) Department: (All) Client Name: Client ID No.: New/Old IC No./Passport/Com. Reg. No.

Client Category: (All)

Drag a column header and drop it here to group by that column

	#	File No.	Sta...	File D...	File Type	Open...	Client Name(s)	Subject
<input checked="" type="checkbox"/>	1	42 DEIT/0042/Sa/23	KIV	30/Jan/2023	SPA SS WT	0.00	Choo Yin @ Choo Gan Yin, Catherine Yap	SPA
<input type="checkbox"/>	2	40 DEIT/0040/lawyer A/22	KIV	28/Nov/2022	SPA SS WT	0.00	(TBC)	
<input type="checkbox"/>	3	39 DEIT/0039/lawyer A/22	KIV	18/Jul/2022	SPA SS WT	0.00	test, Choo Yin @ Choo Gan Yin	Condo 500k
<input type="checkbox"/>	4	38 DEIT/0038/Sa/22	KIV	18/May/2022	SPA SS WT	0.00	Soo Way Ching, Catherine Yap	SPA
<input type="checkbox"/>	5	37 DEIT/0037/Sa/22	KIV	29/Mar/2022	SPA SS WT	0.00	Ali	SPA
<input type="checkbox"/>	6	36 DEIT/0036/Sa/22	KIV	22/Mar/2022	Litigation Hire Purchase	0.00	Public Bank Berhad	Hire Purchase

Figure: Close File – All Search

- After you selected the file you wish to lock file, system will pop up and prompt a confirmation before you lock the file.

SMARTLEG@L Client File Task Manager 21 Billing Payment A/P Receipt Transfer G/L Tax Data Report

File Master - Lock File

Search

File No.: File Type: (All) File Date (From): Date in text File Date (To): Date in text

Subject: File Status: (All) PIC: (All) File Tag:

File Group: (All) Department: (All) Client Name: Client ID No.: New/Old IC No./Passport/Com. Reg. No.

Client Category: (All)

Drag a column header and drop it here to group by that column

Are you sure you want to lock the selected files?

Description	Status
DEIT/0042/Sa/23	

☒ Close window after Successful execution

	#	File No.	Sta...	File D...	File Type	Open...	Client Name(s)	Subject
<input checked="" type="checkbox"/>	1	42 DEIT/0042/Sa/23	KIV	30/Jan/2023	SPA SS WT	0.00	Choo Yin @ Choo Gan Yin, Catherine Yap	SPA
<input type="checkbox"/>	2	40 DEIT/0040/lawyer A/22	KIV	28/Nov/2022	SPA SS WT	0.00	(TBC)	
<input type="checkbox"/>	3	39 DEIT/0039/lawyer A/22	KIV	18/Jul/2022	SPA SS WT	0.00	test, Choo Yin @ Choo Gan Yin	Condo 500k
<input type="checkbox"/>	4	38 DEIT/0038/Sa/22	KIV	18/May/2022	SPA SS WT	0.00	Soo Way Ching, Catherine Yap	SPA
<input type="checkbox"/>	5	37 DEIT/0037/Sa/22	KIV	29/Mar/2022	SPA SS WT	0.00	Ali	SPA
<input type="checkbox"/>	6	36 DEIT/0036/Sa/22	KIV	22/Mar/2022	Litigation Hire Purchase	0.00	Public Bank Berhad	Hire Purchase
<input type="checkbox"/>	7	32 PCALAW/0032/Lawyers	KIV	09/Mar/2022	SPA Dev WOT	0.00	Catherine Yap	SPA

Figure: Close File – Confirmation

- After you confirm to lock the selected file, the pop up confirmation you show a green tick beside the file you closed to show that you successfully locked the file or if you checked the box “Close window after Successful execution” the pop up window will automatically closed.

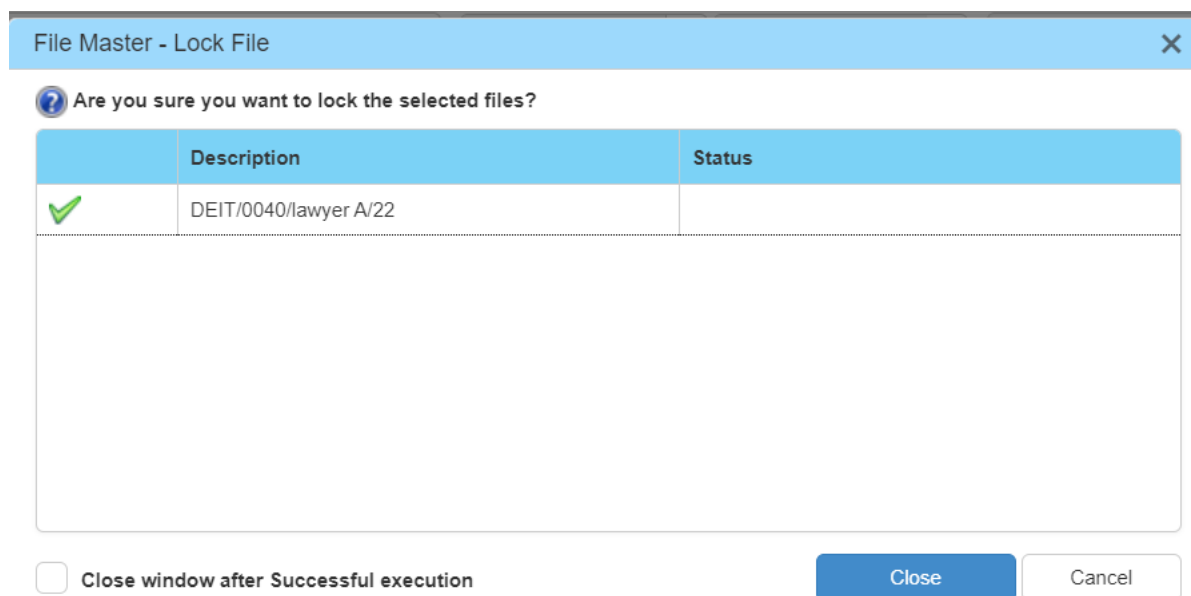


Figure: Close File – Successfully Close File

3.7 Undo Lock File

This option enables you to undo close a file.

- To open Undo Lock File, on the **SmartLeg@l** navigation, click **File** and go to **Undo Lock File** then search the file you wish to close.

Undo Close File

- Search the document you wish to manage through type the search criteria
- To start a new search or to clear the search results, click '**Clear**'.

File Master - Undo Lock File

Figure: Undo Close File

Searched Result

- Click **'Search'** once, to show all Files
- The Searched result will appear at below, otherwise it will shown no record available if the client you searched do not exist.
- Select the check box beside the selected file no.
- For batch processing, tick the column beside File No.
- Click **'Undo Lock File'**.
- Click **'Export'** to print the desired search results in txt, excel or html format.
- Click **'Delete'** to delete the selected record.

File Master - Undo Close File

File No.	Run...	Stat...	File D...	File Type	Client Name(s)	File ...	File ...	Subject
C/R/280618280619/2020/10...	280.619	Closed	08/Oct/2020	Additional loan	Bosku	09/Oct/2...	sa	
CSC280617/2020/06/29/CSC	280.617	Closed	29/Jun/2020	plaintiff	CHAI SOO CHOONG	09/Oct/2...	sa	
testing1234	0	Closed	15/Dec/2019	SPA SS WT	AW SIEO LEY	09/Oct/2...	sa	
SPA 0045	0	Closed	09/Dec/2019	SPA SS WT	Shahurudin	09/Oct/2...	sa	SPA
test1	0	Closed	07/Dec/2019	SPA SS WT	Ahmad Bin Ali Salam	09/Oct/2...	sa	SPA
test1000	0	Closed	07/Dec/2019	SPA SS WT	Ahmad Bin Ali Salam	09/Oct/2...	sa	SPA
test10001	0	Closed	07/Dec/2019	SPA SS WT	Ahmad Bin Ali Salam	09/Oct/2...	sa	SPA
SPA 015	0	Closed	06/Dec/2019	SPA SS WT	Ahmad Bin Ali Salam, CHAI SOO CHOONG	09/Oct/2...	sa	SPA
SPA 0014	0	Closed	02/Dec/2019	SPA SS WT	Melissa	09/Oct/2...	sa	

Figure: Undo Close File – All Search

- After you selected the file you wish to undo lock file, system will pop up and prompt a confirmation before you unlock the file.

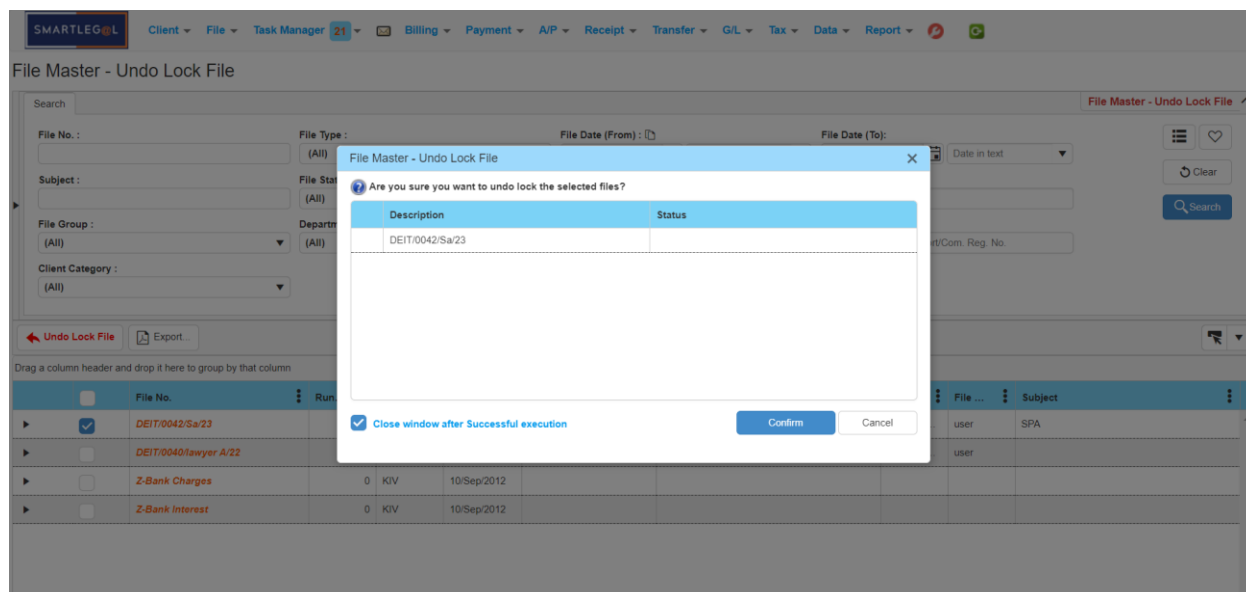


Figure: Undo Close File – Confirmation

- After you confirm to unlock the selected file, the pop up confirmation you show a green tick beside the file you locked to show that you successfully undo close the locked file if you checked the box “Close window after Successful execution” the pop up window will automatically closed.

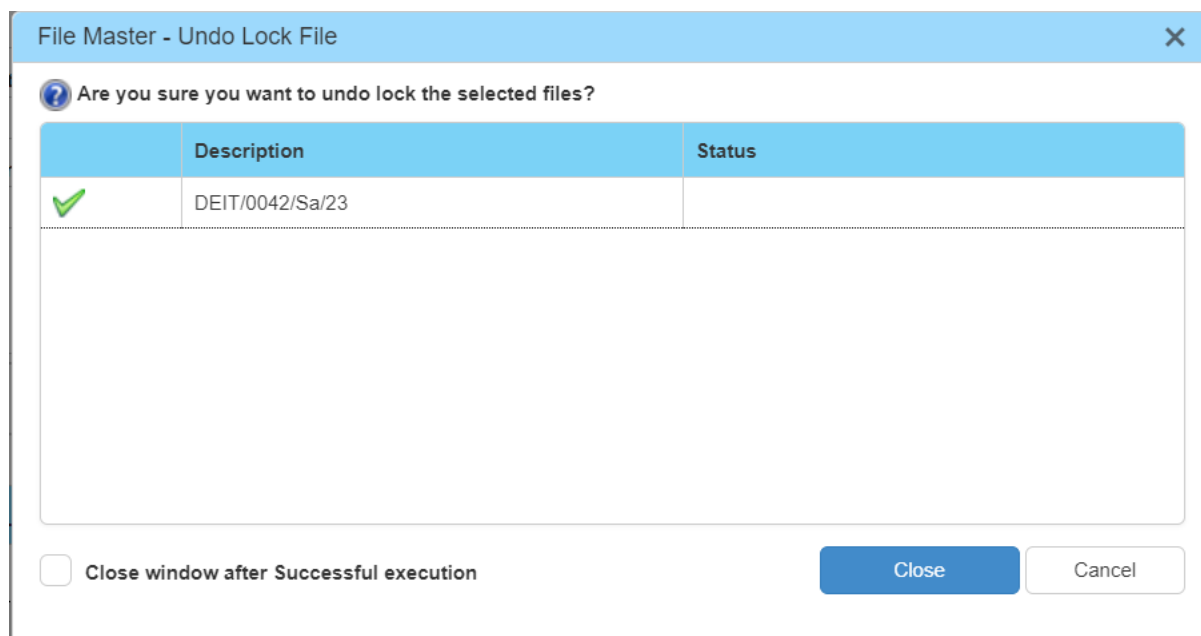


Figure: Undo Close File – Successfully Undo Close File