



PROCUREMENT AND ENFORCEMENT
OF INTELLECTUAL PROPERTY

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C&T Staff Training
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Saving A Document to Multiple Matters

- (1) Click TM save
- (2) Enter information as normal
- (3) Click the “Process” tab at the top

The screenshot shows a dialog box with a menu bar (File, Edit, View, **Process**, Help) and a toolbar. Below the toolbar are tabs: Primary, Related, Notes, Documents, Phone, Email, Mail, Web, Bill. The Primary tab is active. The form contains the following fields:

Date	7/20/2022	Wed	Time
Desc	[DKT 69] Order regarding Jury Court Trial		
MatNo	MZ Audio Sciences, LLC v. SONY		
File Name	&22-45134\ [DKT 69] Order regarding Jury Court Trial.PDF		
Reminders	<input type="checkbox"/> Follow <input type="checkbox"/> Sent		

- (4) Select “Attach to Other Records”
- (5) Select “Matter” and click OK

The dialog box is titled "Attach This Record To Another Record". It contains the text "This Record will be attached to the following Record Type...". Below this text are four radio buttons: Event, Ido, Contact, and **Matter** (which is selected and circled in red). At the bottom are OK and Cancel buttons.

- (6) Type additional matter number(s) in “Go To” section and hit the Tab button
- (7) Check the box(es) of the additional matter number(s) and click OK

The screenshot shows a "Matter List" dialog box. At the top, there is a "GoTo" field (circled in red) and a "filter" dropdown. To the right are OK, Cancel, and a folder icon. Below this is a table with columns: Matter Reference, File No, **Matter No** (circled in red), and Code. The first column has checkboxes, with the first four checked (circled in red).

	Matter Reference	File No	Matter No	Code
<input checked="" type="checkbox"/>	"NO MAKEUP" MAKE-UP		04-13856	R
<input checked="" type="checkbox"/>	"NO MAKEUP" MAKE-UP (AU)		20-42061	F-R
<input checked="" type="checkbox"/>	"NO MAKEUP" MAKE-UP (CA)		20-42060	F-R
<input checked="" type="checkbox"/>	"NO MAKEUP" MAKE-UP (EU)		20-42062	F-R
<input type="checkbox"/>	"NO MAKEUP" MAKE-UP (Japan)		20-42064	F-R