HOW TO CREATE AND MANAGE UNDERTAKINGS ON ALB
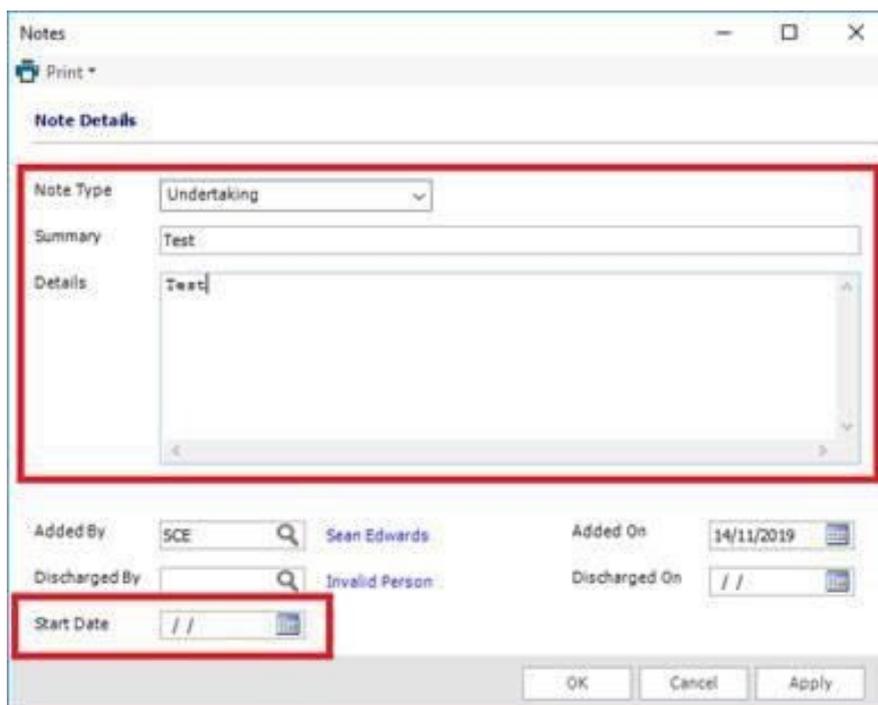
If you want to create the record of an undertaking on a matter, please follow the steps in this document:

HOW TO CREATE AN UNDERTAKING RECORD

1. On the relevant matter, select the Notes tab and create a New Note:
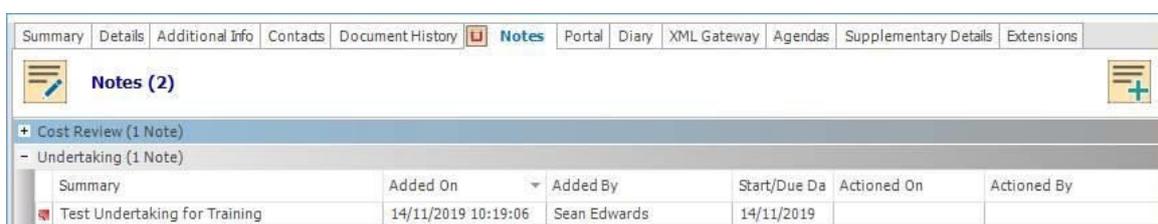

2. On the new Note screen, select the Note Type to be Undertaking and enter details against the:
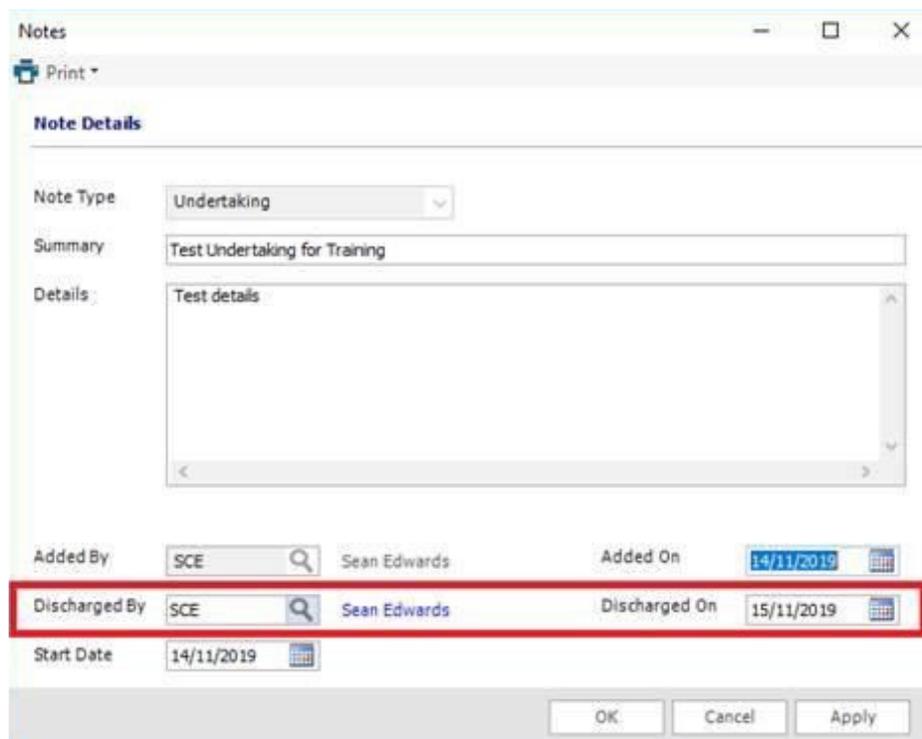   - Summary
   - Details box
   - Set a Start Date

3. Hit Ok to save this record.

Once set, you'll see that the Notes tab gets a new 'U' icon to signify that there's an undertaking stored on the file:

HOW TO DISCHARGE AN UNDERTAKING RECORD

The Undertaking record will prevent the matter from being archived as it will appear as a check against the **Mark for Archiving** process. The record has to be discharged to pass this check. This can be done by double clicking back into the record and setting a date and name against the record as so: