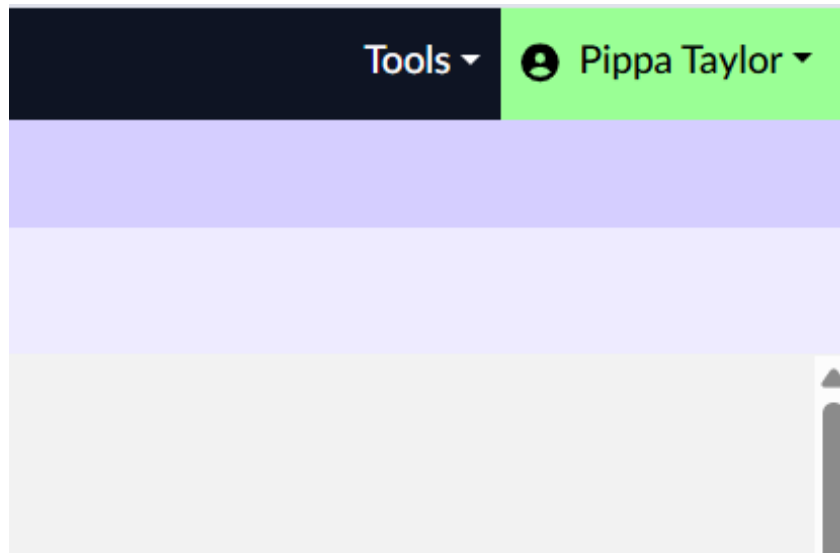


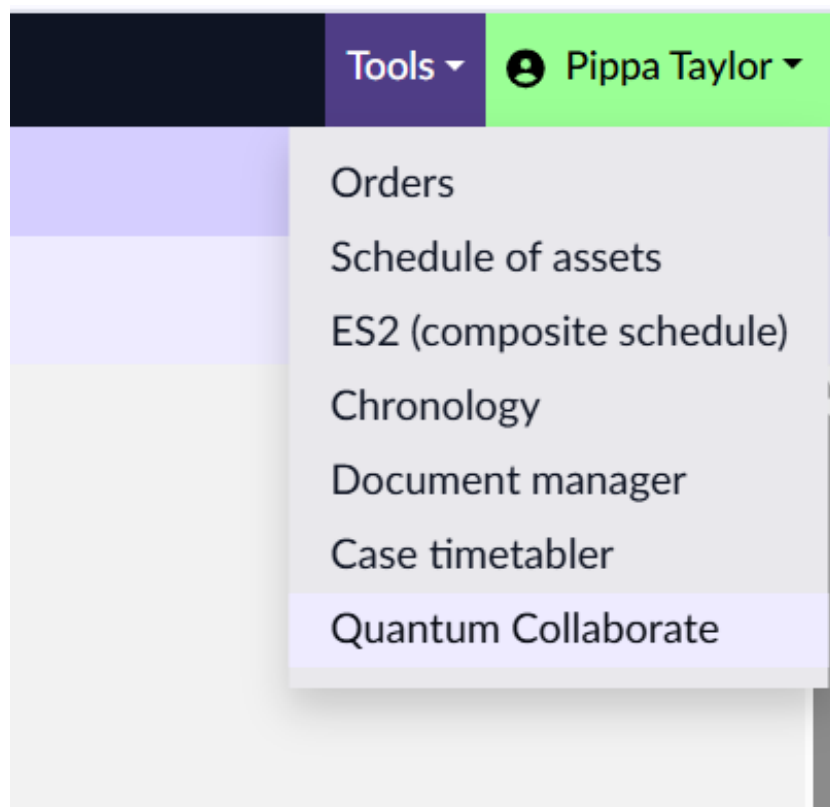
Quantum Collaborate - Solicitor Guide | Quantum Cloud

Accessing Quantum Collaborate

Quantum Collaborate can be accessed from the Tools section in Quantum Cloud.



Click the 'Tools' menu and select 'Quantum Collaborate'.



Collaborating with a client or counsel

Enter the name and email addresses of the person you want to collaborate with and select if they are a 'Client (with documents)', 'Barrister/other (with documents)' or Barrister/other (no documents).

Please note that any documents you have uploaded to your case will be visible to the person you want to collaborate with unless you select 'Barrister/other (no documents)', this is useful when sharing a form with the other sides solicitor.

When you are ready to send your invitation click 'Create collaborator'. This will send your collaborator an email with instructions for accessing their account.

Please note that Quantum invitation emails will expire after 48 hours. If your collaborator has not logged in before this time, you can resend their Quantum invite by selecting the 'Resend invitation' button.

Collaborator details

Name

Email

☒ Client (with documents) ☐ Barrister/other (with documents) ☐ Barrister/other (without documents)

Once you create a collaborator they will immediately have access to their account and be able to see any case information entered on this case.

Create collaboratorResend invitationRemove collaborator

Once you have created your client as a collaborator, they will be able to complete and amend their case information and any differences between your and their data will be highlighted as below.

Collaborator details

Name

Alan Smith

Email

events@classlegal.com

☒ Client (with documents) ☐ Barrister/other (with documents) ☐ Barrister/other (without documents)

Once you create a collaborator they will immediately have access to their account and be able to see any case information entered on this case.

Create collaborator

Resend invitation

Remove collaborator

Case information and documents

Section	Accept all /Compare
Our client	Data is identical
Other party	Data is identical
Dates	Data is identical
Children	Data is identical
Files	Data is identical
Solicitor only sections	Data is identical i

Update collaborator's case information and documents

Shared forms

Select forms

Form	Status	Accept all /Compare	Action
No shared forms have been selected			

Sending forms and documents through Collaborate

You can select which form(s) to collaborate on by clicking the 'Select forms' button.

Shared forms

Select forms

Form	Status	Accept all /Compare	Action
No shared forms have been selected			

A pop up will appear with a list of the forms and documents you can share within Quantum Cloud.

Select shared forms

Select which forms you would like to share with this collaborator

- ☐ Form C1A
- ☐ Form C7
- ☐ Form C100
- ☐ Form C120
- ☐ Form D81
- ☐ Form E
- ☐ Form E1
- ☐ Form E2
- ☐ Form ES1

Select an instance

- ☐ ES2 (Composite schedule)
- ☐ FL401T
- ☐ Chronology
- ☐ Schedule of Assets

Cancel Save form selection

Use the tick boxes to the left of the form names to select which forms you would like to send to your collaborator. You can select as many forms and documents as you wish.

Select shared forms

Select which forms you would like to share with this collaborator

- ☐ Form C1A
- ☐ Form C7
- ☐ Form C100
- ☐ Form C120
- ☐ Form D81
- ☒ Form E
- ☐ Form E1
- ☐ Form E2
- ☐ Form ES1

Select an instance

- ☐ ES2 (Composite schedule)
- ☐ FL401T
- ☐ Chronology
- ☐ Schedule of Assets

Cancel Save form selection

Once you are happy with your selection, click 'Save form selection' to send them to your collaborator.

Shared forms

Select forms

Form	Status	Accept all /Compare		Action
Form E	With collaborator	Accept all	Compare	Mark as reviewed

Reviewing collaborator changes - Case Information

Once your collaborator has returned a form, you will recieve an email letting you know it is ready for review.

D

donotreply@classlegal.com

☺

↶

↷

↵

🔗

📧

⋮

To:

●

 Pippa Taylor

Thu 2025-07-31 10:25 AM

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.

Your collaborator Alan Smith has submitted Form E. Log in to [quantum.classlegal.com](#) to see their copy of the form.

↶ Reply

↷ Forward

Before you can access the form, you first need to ensure that all of the case infomation is identical, as this is the information that auto-populates into the forms and documents that you create.

Case information and documents

Section	Accept all /Compare	
Our client	Accept all	Compare
Other party	Accept all	Compare
Dates	Data is identical	
Children	Data is identical	
Files	Accept all	Compare
Solicitor only sections	Data is identical ⓘ	

Update collaborator's case information and documents

You can see from the screenshot above that changes have been made to the ‘Our client’, ‘Other party’, and ‘Files’ section. You can accept all the changes without looking at them by clicking ‘Accept all’, we would recommend looking at the changes the client has made by clicking ‘Compare’.

Case information and documents

Section	Accept all / Compare	
Our client	<button>Accept all</button>	<button>Compare</button>
Other party	<button>Accept all</button>	<button>Compare</button>
Dates	Data is identical	
Children	Data is identical	
Files	<button>Accept all</button>	<button>Compare</button>
Solicitor only sections	Data is identical ⓘ	

Update collaborator's case information and documents

Changes will be shown in either green or red - green indicates that information has been added and red indicates that information has been removed. Here we can see that the client has removed their middle name from the case as it is highlighted in red.

First name(s)

Alan-James

Accept changes

You can accept this change by clicking the 'Accept changes' button, or if you want to remove the client's changes, simply navigate back to the collaborate dashboard. For the purpose of this guide, we will accept the client's changes.


Accepting changes
×

Clicking on 'Accept changes' will import your collaborator's data as shown above (so including any modifications you may have made to it here) into your form, overwriting any data you have in that section.

Cancel
Accept changes

Once the change has been accepted, you can see the case information shows that the 'Our client' section has identical data. You can then move on to the next sections of your case information and repeat the process.

Case information and documents

Section	Accept all / Compare
Our client	Data is identical
Other party	Accept all Compare
Dates	Data is identical
Children	Data is identical
Files	Accept all Compare
Solicitor only sections	Data is identical ⓘ

Update collaborator's case information and documents

We can see that there is a change to the 'Other party' section of the Case information, so we will click compare to see the changes. We can see the client has add the other partie's middle name as the change is in green.

First name(s) ⓘ

Angela Jane

Angela Jane

Accept changes

You can accept this change by clicking the 'Accept changes' button, or if you want to remove the client's changes, simply navigate back to the collaborate dashboard. For the purpose of this guide, we will remove these changes, and so simply navigate back to the collaborate dashboard.

As we have not accepted this change, we can see the difference still highlighted in the 'Other party' section. You can then move on to the next sections of your case information and repeat this process.

Case information and documents

Section	Accept all / Compare
Our client	Data is identical
Other party	Accept all Compare
Dates	Data is identical
Children	Data is identical
Files	Accept all Compare
Solicitor only sections	Data is identical ⓘ

Update collaborator's case information and documents

If your client has uploaded any documens to their case they will appear in the 'Files' section of the case information. You can either click 'Accept all' to pull through all of the documents, or click 'Compare' to see details.

If you client has uploaded any PDF documents to their case they will appear in the 'Files' section of the 'Case information'. If we click compare we can see that the client has added a property valuation.

Collaborator files

File name	Upload date	Referenced in	Accept change will
  Property Valuation.pdf	01/08/2025 14:32	Form E: Properties - 123 Old School Building	Add

Solicitor files

File name	Upload date	Referenced in	Accept change will
-----------	-------------	---------------	--------------------

Accept changes

You can accept this change by clicking the 'Accept changes' button, or if you want to remove the client's changes, simply navigate back to the collaborate dashboard. For the purpose of this guide, we will accept this document.

Case information and documents

Section	Accept all /Compare
Our client	Data is identical
Other party	Accept all Compare
Dates	Data is identical
Children	Data is identical
Files	Data is identical
Solicitor only sections	Data is identical 

Update collaborator's case information and documents

Now that the changes we want have been accepted, and anything you don't want saving has been ignored, you can click 'Update collaborators case information and details' - this will pull through the changes you accepted into your Case information and remove any changes you ignored. Once this is done, you will be able to review the form.

 **Updating collaborator's case information and documents** ×

Please ensure that you have accepted/compared all case information or documents before clicking on update.

Once you have accepted the collaborator's changes that you want, you must update their version of case information (i.e. rejecting any unaccepted changes).

Before you can import or compare forms your case information and documents must match your collaborator's version.

Cancel Update

Please note that any changes not accepted will be removed upon clicking 'Update collaborators case information and details' so please ensure you thoroughly review the case information.

Reviewing collaborator changes - Forms

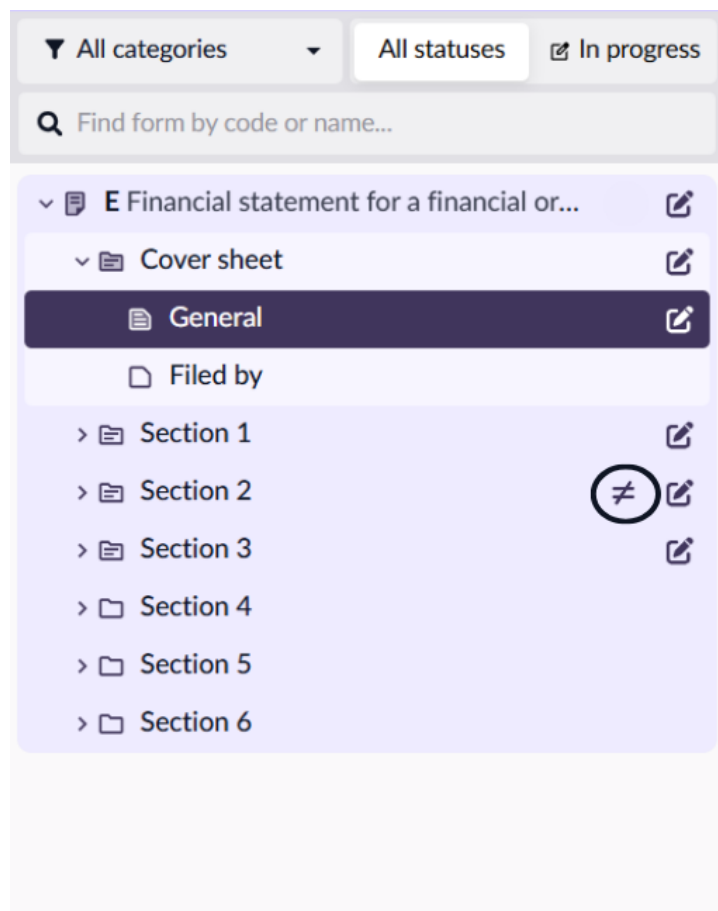
Now that the case information is identical, we can access the form to review any changes. If you sent across a blank form, you may want to 'Accept all' changes, however we would recommend choosing 'Compare' to see the individual changes.

Shared forms

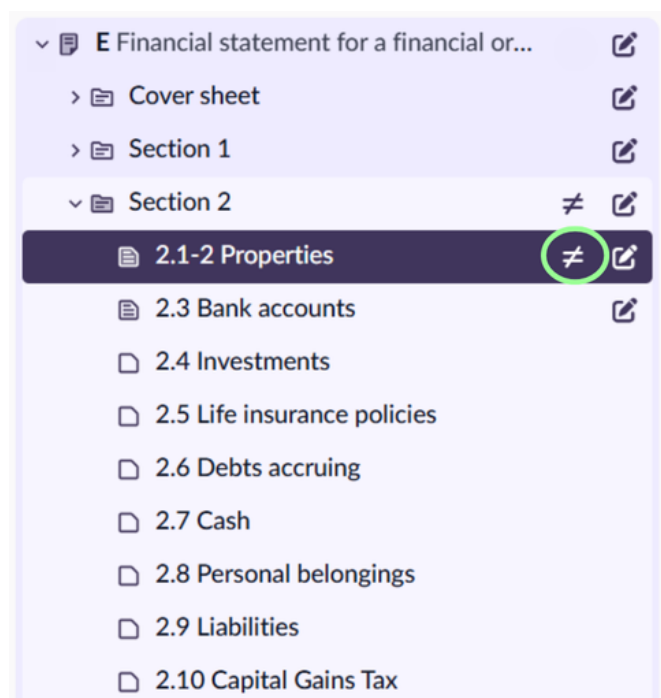
Select forms

Form	Status	Accept all /Compare		Action
Form E	Awaiting review	Accept all	Compare	Mark as reviewed

The sections of the form will open up on the left hand side of your screen. Any sections where the client has made changes will show this the track change icon.



We can see from the icon that changes have been made in sections 2.1-2.2.



When sections are laid out in a table format, such as in properties and bank accounts, the changes are laid out in a different way. Each section within the table will show as either 'Unchanged', 'Edited', or 'Added'.

2.1-2 Properties

Property name and address	Matrimonial home	Compared to our version
123 Old School Building , Church Street, ...	Yes	Edited

☐ Page break

Accept changes

To look at the desired property, you need to select the property and then click 'Modify'.

2.1-2 Properties

Property name and address	Matrimonial home	Compared to our version
123 Old School Building , Church Street, ...	Yes	Edited

☐ Page break

Accept changes

Any changes made will then pop up with the red or green text to indicate whether the information has been added or removed. Here we can see that the property valuation document was added.

2.1-2 Properties

Valuation document

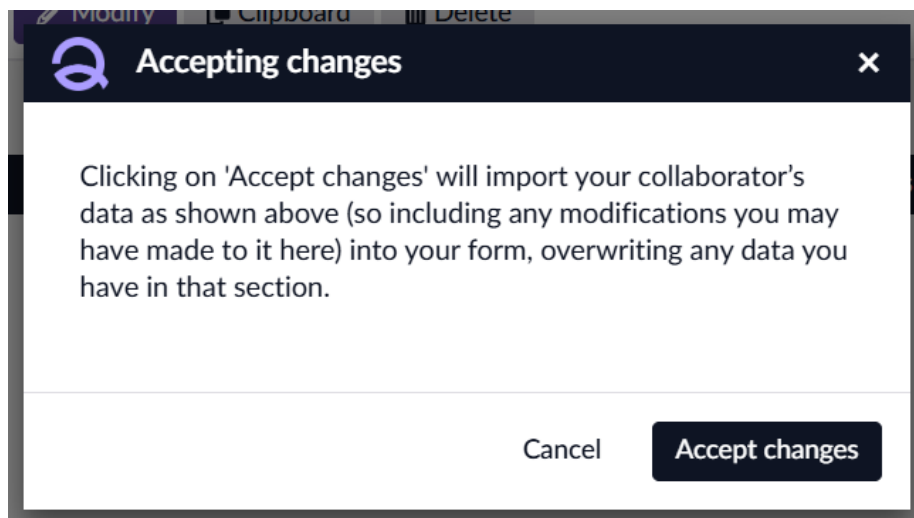
Property Valuation.pdf

(Drop file(s) here or click to browse your files)

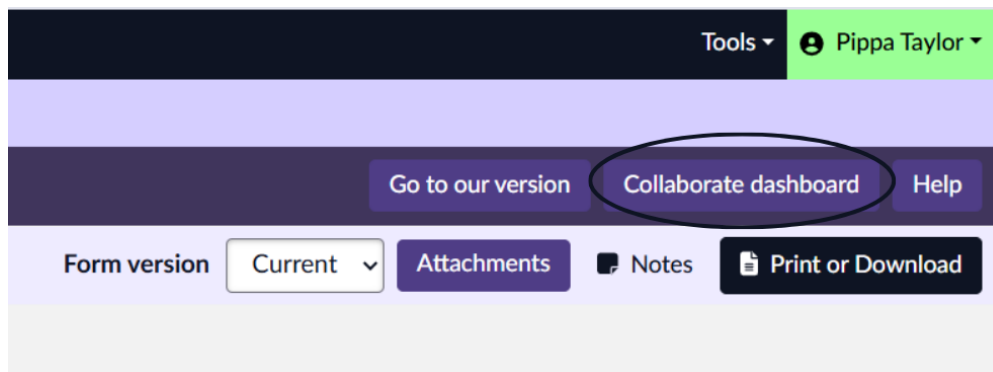
[Property Valuation.pdf](#)

OK

To accept this change, we will go back to the table view and click 'Accept changes', if you want to reject this change, simply ignore it and move on to the next section of the form that requires your attention. For the purpose of this guide we will accept this change.

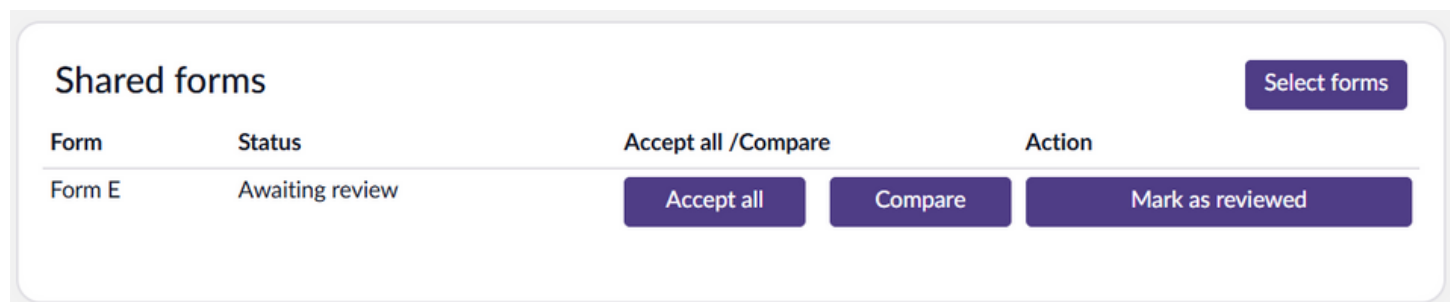


Once you have worked through the form and accepted any changes you want and ignored any changes you don't want, you can return to the collaborate dashbaord. You can quickly access this via the 'Collaborate dashboard' button located above the 'Print or Download'.



You can the click 'Mark as reviewed' - this will pull through the changes you accepted into your form and remove any changes you ignored.

Please note that any changes not accepted will be removed upon clicking 'Mark as reviewed' so please ensure you thoroughly review the form.



The 'Mark as reviewed' button will then change to 'Return to collaborator', you can click this button to send the form directly back to your client. If you wish to work on the form first before sending it back, we would recommend removing the form from the client, making the relevant changes, and then adding the form back to the client.

Shared forms

Select forms

Form	Status	Accept all /Compare	Action
Form E	Reviewed	Accept all	Compare
Return to collaborator			

Removing a Collaborator

As a firm, you have a dedicated amount of Collaborate Keys, these keys determine how many cases can have a collaborator at one time. The amount of keys that available for use are shown in the top right-hand corner of the collaborate dashboard.

Tools

Pippa Taylor

Refresh

Remaining capacity: 2

Once you have finished collaborating with a client, it's good practice to remove them as a collaborator to free up a Collaborate Key. You can add and remove collaborators from a case as many times as necessary.

To remove a client you simply need to click 'Remove Collaborator' under their name and email address.

Quantum Collaborate help

Collaborator details

Name

Alan Smith

Email

events@classlegal.com

☒ Client (with documents)
 ☐ Barrister/other (with documents)
 ☐ Barrister/other (without documents)

Once you create a collaborator they will immediately have access to their account and be able to see any case information entered on this case.

Create collaborator

Resend invitation

Remove collaborator

Please note that any changes not accepted will be removed upon clicking 'Remove collaborator' so please ensure you thoroughly review the case information and form.



If you have any questions or need support please email us at info@classlegal.com or call us on 01652 652222. We are open from 9am-5.30pm, Monday to Friday.