

Arctrieval Legal Arctrieval <> Filevine Integration Setup Guide

> June 25, 2025 Document Version 2.0

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1. Introduction

Arctrieval is a unique software-based approach to obtaining and managing medical records, billing information, and imaging studies for legal professionals. Filevine is a leading case management system law firms use to manage their business.

Arctrieval's integration with Filevine is our commitment to our mutual customers. This integration provides additional functionality and features that not only improve the workflow for you, but also enhance the user experience, making your work more efficient and effective.

When it comes to integrating Arctrieval and Filevine, we offer you two flexible options. This allows you to choose the setup that best suits your needs, giving you the power to control your integration process.

1.1. Setup Option 1: Standard Configuration

In the baseline configuration, you will enter Filevine Personal Access Token into Arctrieval, create a subscription, and import the pre-built Arctrieval Client and Arctrieval Request sections into one or more Filevine Project templates. The Arctrieval Client and Arctrieval Request sections operate independently of the other Filevine Project templates.

If you can access the API Credentials in the Advanced Menu and the Import/Export functionality in the Customs Editor, setting up the default configuration should take 10 minutes to complete.

1.2. Setup Option 2: Custom Configuration

In the custom configuration, you will enter Filevine Personal Access Token into Arctrieval, create a subscription and enter Arctrieval-specific fields into the desired sections in a Filevine project template, and adjust the mapping in Arctrieval.

You will need access to the API Credentials section in the Advanced Menu and access to the Customs Editor.



An experienced Filevine System Administrator or Filevine Integration partner should set up a custom configuration. If you need assistance with a custom integration, Arctrieval is happy to introduce you to a Filevine Integration partner. Arctrieval does not have the advanced knowledge to assist with a custom configuration.

2. Functionality Overview

Arctrieval's integration provides the following functionality between the two systems.

- 1. Client Information
 - a. Import Filevine Client information from the Filevine Address Book into an Arctrieval Client record through the Arctrieval Add Client process. One client is added from Filevine to Arctrieval at a time.
 - b. Pull updated Filevine Client information from Filevine Address Book into the Arctrieval Client record through the Arctrieval Client Activity Update From Filevine process. Client information is updated in Arctrieval one Client at a time.
 - c. Push updated Arctrieval Client information from Arctrieval Client records to Filevine Address Book through the Arctrieval Edit Client process. When Client information is updated in Arctrieval, the Arctrieval User is prompted whether or not to update the information in the Filevine Client information in the Filevine Address Book.
 - d. Link an existing Arctrieval Client record with an existing Filevine Client in the Filevine Address Book.

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- e. Remove the link between Filevine Client information from Filevine Address Book and Arctrieval Client record. Only an Arctrieval Attorney Firm Administrator or Arctrieval Attorney Firm User (with the appropriate permission) may break the connection.
- 2. Medical Provider Information (Arctrieval Contact)
 - a. Import Filevine Medical Provider information from the Filevine Address Book into an Arctrieval Contact record through the Arctrieval Add Contact process. Each medical provider is added from Filevine to an Arctrieval Contact one at a time.
 - b. Pull updated Filevine Medical Provider information from Filevine Address Book into the Arctrieval Contact record through the Arctrieval Contact Activity Update From Filevine process. Contact is updated in Arctrieval one at a time.
 - c. Push updated Arctrieval Contact information from the Arctrieval Contact record to a medical provider in the Filevine Address Book through the Arctrieval Edit Contact process. When Contact information is updated in Arctrieval, the Arctrieval User is prompted whether or not to update the information in the Filevine Medical Provider information in the Filevine Address Book.
 - d. Link existing Arctrieval Contact record with an existing Filevine Medical Provider in the Filevine Address Book.
 - e. Remove the link between Filevine Medical Provider information from Filevine Address Book and Arctrieval Contact record. Only an Arctrieval Attorney Firm Administrator or Arctrieval Attorney Firm User (with the appropriate permission) may break the connection.
- 3. Submit Record Requests from Filevine to Arctrieval
 - a. Any Filevine User can send a record request from Filevine to Arctrieval for processing by the attorney's medical record team.
 - b. Requests are reviewed by the attorney's medical record team in Arctrieval and released for delivery to the healthcare provider or covered entity.
- 4. Link existing Arctrieval Requests to an existing Filevine Project
 - a. If a request is started, created, and sent through Arctrieval, the request can be linked to an existing Filevine Project.
- 5. Data synchronization between Arctrieval and Filevine
 - a. All Arctrieval request activities are reported back to the request in Filevine.
 - b. All Arctrieval history entries are reported back to the request in Filevine

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c. All documents created or uploaded in Arctrieval are uploaded to the request and project document folder in Filevine.

Date	Document Revision	Description of Changes
7/15/2023	1.0	Initial Document.
7/15/2023	1.1	Request expense field information added, notice for Arctrieval Client section added, notice about Filevine data validation for State in an address.
8/5/2023	1.2	Information about API Key access and Customs Editor Import/Export tool.
8/25/2023	1.3	Revised information about Scope requirements. Subscriptions: Read and Subscriptions: Update are needed.
11/15/2023	1.4	Added information for contact field support between Filevine organization contact type and Arctrieval Contact.
5/29/2024	1.5	Revised information on how to access Filevine keys, additional explanation about the Baseline and Custom Configurations, and document refinement.
3/20/2025	1.6	PAT Authentication setup instructions added. API Key setup instructions removed. Update to adding Arctrieval Department to Filevine
3/27/2025	1.7	Added information about Auto-move folder set up and configuring multiple Filevine Orgs
4/17/2025	1.8	Support for multiple Contact Types in Filevine. Mapping multiple Contact Types to Client and Contact records in Arctrieval.
6/20/2025	1.9	New functionality to create Request sub-folders in Docs or specified Auto- move to Folder.
6/25/2205	2.0	Added information on how to set up a service account for Arctrieval.

3. Document Change History

4. Arctrieval Configuration

To enable Filevine and Arctrieval to communicate and exchange data, the following must occur:

- 1. Arctrieval activates the Integrations tab in the Arctrieval Settings for firms with a multiple-user subscription. The Filevine integration feature is only available to firms with a subscription for multiple users. Please get in touch with Arctrieval to activate the feature.
- 2. Obtain your Arctrieval FirmID to use as part of the integration configuration. Please get in touch with Arctrieval to for your unique Arctrieval FirmID.
- 3. Activate the Arctrieval Integration from the Integrations page on the Advance menu.
- 4. Create a Personal Access Token in Filevine.
- 5. On the Arctrieval Integration page, in the Settings menu, you must add a Personal Access Token.
- 6. Create a Subscription in Filevine for the Arctrieval integration.
- 7. The Arctrieval fields are added to Filevine Project templates by importing the pre-configured sections or manually entering the data fields into an existing section. There are two options.

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- a. The Arctrieval Client and Arctrieval Request section files (ArctrievalClient.fvst and ArctrievalRequest.fvst) must be imported into a Filevine Project template.
- b. Required Arctrieval data fields must be added to an existing section in a Filevine project template to submit requests and mapped to Arctrieval. The same Section Selector and Field Selector values must be used across all the Filevine project templates.

5. Existing Integrations—Updating to Personal Access Token

For existing customers using a dedicated API key for their API credentials, the Arctrieval Attorney Firm Administrator will see the following page when clicking on the Integrations tab in the Settings menu. The process for replacing the API key with a Personal Access Token is the same for a new integration.

Click the Update Filevine Access Token to start the process and follow the directions below.

= Arctrieval Spence	er & Smith							Willy	Wonka 🗸 ⑦HELP
A Dashboard	Users	Account	Plan and Billing	Disbursement Account	Document Types	Document Templates	Integrations		
Clients	ENABLE AD	DITIONAL CONTACT FIE	LD RESET MAP	UPDATE FILEV	INE ACCESS TOKEN	UPDATE FILEVINE API KEY	TEST FILEVINE LINK	REMOVE FILEVINE API KEY	ADD CONTACT TYPE
Record Requests	FILEVINE INTEGRATIO	N							
Contacts	API Key:		fvpk6a	139			Option for a	wisting sustamors to	
Reports	API Secret:		fvsk0f9	d3			update auth	ientication API	
Forms	Base Filevine URL:		https://sa	ndbox.api.filevineapp.com/			Credentials Personal Ac	from API keys to	
Settings	Last Updated On:		05/13/202	14			reisonariac	Cess Tokens.	
	Is Filevine Contact Addition	onal Fields Used:	No						
	Sections and Fields	Contact Types							
	Filevine Section Selector	Filevine Field	1 Selector	An	ctrieval Section	Arctrieval Field Name			
	arctrievalClient	arctrievalC	lientLast4SSN	CI	ient	Last 4 of SSN			EDIT
	arctrievalClient	arctrievalC	lientAliases	CI	ient	Aliases			EDIT
	arctrievalClient	arctrievalL	anguagePreference	CI	ient	Language Preference			EDIT
	arctrievalClient	arctrievalP	atientPhotoID	CI	ient	Patient's Photo ID			EDIT
	arctrievalClient	arctrievallr	takeForm	CI	ient	Arctrieval Intake Form			EDIT
	arctrievalClient	arctrievalP	ersonalRepresentativeBo	olean Cl	ient	Is The Client A Minor, Have A	Legal Guardian Or Personal Re	presentative?	EDIT
	arctrievalClient	arctrievalP	erRepFirstName	CI	ient	Personal Representative First	Name		EDIT
	arctrievalClient	arctrievalP	erRepLastName	CI	ient	Personal Representative Last	Name		EDIT
	arctrievalClient	arctrievalP	ersonalRepRelationship	CI	lent	Personal Representative Relat	tionship		EDIT
	arctrievalClient	arctrievalP	ersonalRepOther	CI	ient	Personal Representative Relat	tionship Other Description		EDIT
								Rows per page: 10 - 10 of 31	I< < > >I
© 2025 Arctrieval All Rights Reserved.									

Once you configure Arctrieval's integration using a Personal Access Token, you cannot go back to using an API key.

The process to convert from using API Credentials to using a Personal Access is the same as setting up a new integration without the need to enter information in the Customs Editor. To continue the update to using a Personal Access Token follow the process outlined below starting in Section 6.

5.1. Establishing the Link Between Filevine and Arctrieval

Once the Filevine and Arctrieval integration is enabled, the Arctrieval Attorney Firm Administrator will see the Integrations Tab on the Settings menu, as shown in the image.

≡ Arctrieval Spence	er & Smith							Jared Vishney ~	@HELP
Dashboard	Users	Account	Plan and Billing	Disbursement Account	Document Types	Document Templates	Integrations		
Clients								UPDATE FILEVINE A	CCESS TOKEN
Record Requests	FILEVINE INTEGRAT	ION							
Contacts	Personal Access Toker	1:	No value i	s present.					
Reports									
Forms	Sections and Fields	Contact Types							
Settings	Filevine Section Selector		Filevine Fiel	d Selector	Arctrieva	Section	Arctrieval Field N	ame	
							Rows per page: 1	0 ▼ 0 of 0 <	$\langle \rangle \rangle$

Clicking the Update Filevine Access Token button displays the dialog box in the image.

The Personal Access Token is available through your Filevine account.

To continue the

update to using a Personal Access Token follow the process outlined below starting in Section 6.

Update Filevine Integration

Enter Personal Access Token

shared with any other service.

Personal Access Token: *

5.2. Filevine Org Mapping (Optional)

Each Arctrieval account can only be linked to one Filevine Org. If your Filevine Account has multiple

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Orgs, you must choose which organization to connect with your Arctrieval account. As part of the integration setup, the following dialog box is displayed if Arctrieval detects more than one Org in your account.

Select the Filevine Org from the dropdown list and click the Save Changes button.

Update Filevine Org Mapping		×
Filevine Org: * 	ct the Filevine Org that yc	
	CANCEL	AVE CHANGES

Note: The Filevine Personal Access Token is stored in an encrypted format. The token is used only within Arctrieval and not

Update Filevine Org Mapping			>
Filevine Ore: * Arctrieval, ID: 18	•		
SecondOrg_Test, ID: 91			
	0	CANCEL	SAVE CHANGES

×

SAVE CHANGES

CANCEL

6. Activating the Arctrieval Integration

Sign in to your Filevine account and navigate to the Integrations section in the Advanced menu. If you do not see the Integrations tab, you must get additional permissions for your Filevine User Account or have your firm's Filevine Administrator continue the process.

6.1. Activate Integration

Navigate to Integrations in the Advanced menu options to display the Arctrieval integration.



1. Click Activate to enable the Arctrieval integration with Filevine. Activating the integration allows it to connect with your environment. This authorization is intentionally independent from the subsequent steps, because it shows that the Account Admin has expressly authorized the integration.

6.2. Create Service Account

Navigate to the Service Accounts in the Advanced menu options as shown.

≡ 🗲 Feed 🔗 Tasks	Project Hub	Mailroom	* Filevine	Q Search for a project	Ō E	Active -
Advanced					2	
- Filter Menu	Arctrieval				Q Search	+ New
I∎ Fax Usage	Name		Email	Statu	us Created	
🔨 Judicial Calendar	Client Portal		clientportal@filevine.cor	n Acti	ve Mar 13, 2	2025
Mass DocGen	Testing		testing@filevine-service	-accounts.com Acti	ve Nov 26,	2024 :
• Mass Permissions						
➡, Mass Update						
1 Merge Contacts						
📞 Org Phone Numbers						
O Reminder Schedules						
ReportFusion						
🎝 Roles Setup						
Service Accounts						

8

2. Click the + New Button to create a new service account.

🚍 🕴 Feed 🔗 Tasks	s 😑 Project Hub 🦆 Mailroom	*Filevine	h for a project 🗴 🖻 📄 🧟 🕬 🗸
Advanced			New Service Account
- Filter Menu	🚉 Arctrieval	3 👡	Ad Hoc Ad Hoc
🖬 Fax Usage	Name	Email	Arctrieval Workato
🕺 Judicial Calendar	Client Portal Testing	clientportal@filevine.com testing@filevine-service-accounts.co	Permissions
Or Mass Permissions			All Permissions I'll add permissions manually later
Mass opdate Mass opdate Merge Contacts			
Crg Phone Numbers			
ReportFusion Roles Setup			
Service Accounts			
Tag Manager			

3. In the dropdown field, select Arctrieval and make sure the All Permissions radio button is selected.

You should now see a service account named Arctrieval in the list as shown in the image.

≡	🗲 Feed	⊘ Tasks	⊒I Project Hub	Mailroom	* Filevine	Q Search for a proj	ect	Ō	Ē		1	Arctrieval -
Adva	anced											
Ţ Fil	lter Menu		🚓 Arctrieval					Q Sear	ch		+	- New
Fa Fa	ix Usage		Name		Email		Status		Created			
Ju Int	idicial Calendar		Arctrieval		arctrieval@filevine-cpi	-service-accounts.com	Active		Jan 22,	2025	1	I
_∎ Ma	ass DocGen		Client Portal		clientportal@filevine.c	om	Active		Mar 13, 3	2025	-	I
Or Ma	ass Permissions		Testing		testing@filevine-servic	ce-accounts.com	Active		Nov 26,	2024	;	
≡, Ma	ass Update											
¢ Me	erge Contacts											
📞 Or	rg Phone Numbe	rs										
🛈 Re	eminder Schedul	es										
OD Re	eportFusion											
🖧 Ro	oles Setup											
🔥 Se	ervice Accounts											
🖿 Ta	g Manager											

6.3. Create and Enter Personal Access Token

You will now need to navigate to the Account Manager page.

- 4. Clicking on your user button in the upper right corner of the Filevine Application
- 5. Clicking on Manage My Account



<table-cell> Account Manager</table-cell>			[≪] Filevine		•
= Filter Menu	Access Tokens				
Profile Products	Personal Access Tokens	Client Secrets			
 Security Product Licenses 	6				(7)
😵 Users	Name	User	Expires	Scopes	
C Activity	Expres	🛢 antrianal@filestra.cgi aarsina anno.	Apr 23, 2025	Filevine API Access	
Access Tokens	102	Insting@flacing.service.accounts.c.	Apr 21, 2025	Filevine API Access	
표는 Account Configuration	Accelerate all 2	🗧 antifacat@filestra.cpi.aerita.acci.	Apr 22, 2025	Filevine API Access	
	Tests	🛢 antrianal@filesina.ogi aarrita atta.	Apr 22, 2025	Filevine API Access	
	Recting PRT	antressigneese op arrite acc.	Apr 22, 2025	Filevine API Access, Vitals API A	

- 6. Click on Access Tokens in the Account Manager menu.
- 7. Click on + New.

🍖 Account Manager			* Filevine		
= Filter Menu	Access Tokens				
Profile Products Security Products	Personal Access Tokens	Client Secrets			+ New
Users	Name	User	Expires	Scopes	
Activity	Expres	anterest from or service acc.	Apr 23, 2025	Filevine API Access	New Token X
Access Tokens	1007	testing@flavine.acrite.accounts.t.	Apr 21, 2025	Filevine API Access	Arctrieval
금는 Account Configuration	Accessed 2	antresat@flastes.cp.actics.acc.	Apr 22, 2025	Filevine API Access	User*
	Testin	🛢 antiferat@filesina.cpi aerica acco.	Apr 22, 2025	Filevine API Access	Select a User
	Ave Unav 7907	antrianal@flantsa.cpi.aaritaa.acci.	Apr 22, 2025	Filevine API Access, Vitals API A	area byteo all the heraft con-

- 8. Enter a Name for the Token
- 9. Select the arctrieval@filevine-cpi-service-accounts.com User from the list for the Token.



🔥 Account Manager			[≪] Filevine		•
 ⇒ Filter Menu Profile Products 	Access Tokens Personal Access Tokens	Client Secrets			
C Security					+ New
Product Licenses					
🚱 Users	Name	User	Expires	Scopes	New Token
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😯 Access Tokens	PAC .	testing@flacing service accounts.t.	Apr 21, 2025	Filevine API Access	Name* Arctrieval
금는 Account Configuration	Accessed 2	antread@fierra.cpt.aerica.acc.	Apr 22, 2025	Filevine API Access	
	Teaction .	· antitest (Tentra optimentes acco.	Apr 22, 2025	Filevine API Access	user* arctrieval@filevine-cpi-service-accounts.c
	Ave. Univ. PMT	antread@flactus.cpi service acco.	Apr 22, 2025	Filevine API Access,	Vitals API A
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	1 to 5 of 5		ş	Show 50 - IC C Page 1	tof1 >>> Cancel Creste

- 10. Enable Filevine API Access
- 11. Enable Webhook API Access
- 12. Click on Create

Recount Manager			* Filevine		•
	Access Tokens Personal Access Tokens	Client Secrets			
SecurityProduct Licenses					+ New
😨 Users	Name	User	Expires	Scopes	
Activity	Expres	• • • • • • • • • • • • • • • • • • •	Apr 23, 2025	Filevine API Access	
Access Tokens	net .	Testing (Plasing acrise accounts	Apr 21, 2025	Filevine API Access	
∃≓ Account Configuration	Accessed 2	·	Apr 22, 2025	Filevine API Access	
	Same .	🛢 antifacat@flactus.cpi.arrita.arra.	Apr 22, 2025	Filevine API Access	
	Are User PAT	International printing out any taxation according	Apr 22, 2025	Filevine API Access, Vitals API A	
	Arctrieval	Ivish Personal Access Token This is your personal access to You will not be able to see it ago	ken, Please copy it and store it in a safi	Pl Access, Webhook A	

13. Click on the Copy Icon to obtain the value of the Personal Access Token.

June 25, 2025



The Personal Access Token should be copied to a secure document or location. The Personal Access Token is only available at the time it is first created. If you lose or forget the Personal Access Token, you will have to create a new one in the future.

Update Filevine Integration		×
Personal Access Token: *	14	
Note: The Filevine Personal Access Token is stored in an encrypted f shared with any other service.	ormat. The token is used only within Arctrieval and no	ot
	CANCEL SAVE CHANG	ES

- 14. Return to the Arctrieval web page from the steps above and paste the Personal Access Token into the field.
- 15. Click the Save Changes button.

After entering the correct Personal Access Token and clicking the Save Changes button, the following web page in the image is displayed.

≡ Arctrieval Spence	er & Smith							Jared Vis	shney 🗸 🔇	⑦HELP
A Dashboard	Users	Account F	Plan and Billing	Disbursement Account	Document Types	Document Templates	Integrations			
Clients	ENABLE A	ADDITIONAL CONTACT FIELD	RESET MA	PPING UPDATE FI	LEVINE ACCESS TOKEN	TEST FILEVINE LINK	REMOVE FILEVIN	E ACCESS TOKEN	ADD CONTA	CT TYPE
Record Requests	FILEVINE INTEGRATIO	N								
Contacts	Personal Access Token:		A0AEB62	FAD						
Reports	Organization:		Arctrieval, II	D: 18						
Forms	Last Updated On:		04/17/2025	5						
Settings	Is Filevine Contact Additio	nal Fields Used:	No							
	Sections and Fields	Contact Types								
	Filevine Section Selector	Filevine Field Selector		Arctrieval Sect	ion Arctrieval Fiel	d Name				
	arctrievalClient	arctrievalClientLast4	SSN	Client	Last 4 of SS	Ν			E C	EDIT
	arctrievalClient	arctrievalClientAlias	25	Client	Aliases					EDIT
	arctrievalClient	arctrievalLanguageP	reference	Client	Language P	reference				EDIT
	arctrievalClient	arctrievalPatientPho	toID	Client	Patient's Ph	oto ID				EDIT
	arctrievalClient	arctrievalIntakeForm		Client	Arctrieval In	take Form				EDIT
	arctrievalClient	arctrievalPersonalRe	presentativeBoolean	Client	Is The Client	: A Minor, Have A Legal Guardi	an Or Personal Represent	ative?		EDIT
	arctrievalClient	arctrievalPerRepFirs	tName	Client	Personal Re	presentative First Name				EDIT
	arctrievalClient	arctrievalPerRepLast	tName	Client	Personal Re	presentative Last Name				EDIT
© 2025 Arctrieval All Rights Reserved.	arctrievalClient	arctrievalPersonalRe	pRelationship	Client	Personal Re	presentative Relationship			L.	EDIT
1										

6.4. Filevine Org Mapping (Optional)

Each Arctrieval account can only be linked to one Filevine Org. If your Filevine Account has multiple

Orgs, you must
organization to
connect with your
Arctrieval account. As
part of the integration
setup, the following
dialog box is displayed
if Arctrieval detects
more than one Org in
your account.

Update Filevine Org Mapping		×
Filevine Org: * Note! Only one Filevine Org can be connected to one Arctrieval Account connect to the Arctrieval Account: Frederick, Gallagher and Spencer.	nt. Please select the Filevine Org f	* that you want to
	CANCEL	SAVE CHANGES

Select the Filevine Org from the dropdown list and click the Save Changes button.

Update Filevine Org Mapping	>	<
Ellavino Ora: * Arctrieval, ID: 18	b	
	CANCEL SAVE CHANGES	

7. Configuring Subscriptions in Filevine

Navigate to the API Credentials section in the Advanced menu, and you should see the following image.

≡	🕈 Feed	⊘ Tasks	s 📑 Project Hub	Mailroom		[≪] Filevine		Q Search for a project	• گ 🖳
Adva	inced								
Ţ Filt	er Menu		API Credentials	s					API Documentation
API	Credentials		API keys will be Filevine data. K support page.	e deprecated by the end Key have been limited to	of December 2025. After this date a maximum of 3 per Filevine Org. I	e, API keys will stop working and you will ha f you need more keys, please leverage Per	ive to migrate to Personal access tokens. Pr sonal Access Tokens (PATs), which are not s	ersonal access tokens allow you to more secure subject to limits. Details about how to use PATs c	ly grant API access to an be found on our Learn More
E Cle Clie Coi Coi Coi Coi Coi Coi Coi Coi Coi Coi	ar Feed ent Portal Ma ntacts Setup stoms Editor adline Chains	anager s	Org* Arctrieval API Base URI https://arctrievaldev	Copy (api.filevineapp.com/	Org API User Filevine Integration (142 O'THTRNyFISOWXDr@filevine	.) api			
Tel	ete Batch cGen Setup		O- Credentials	Subscriptions	← 1				
Fax	Usage		Create New Subsc	ription	2			Events Documental	ion C Refresh Subscriptions
📲 Inte	grations		Name		Api Key	Endpoint	Events	Last Modified	
🖄 Juc	licial Calenda	ar	0	and street	Planta identity Digesture	https://doilogal.activised.com/s.	Taskflow.Executed	Mar 14, 20	25, 8:18:27 AM
Ma Ma	ss DocGen		0	and the sectors	Plastic Helly Spaties	https://wellingst.archive.od.com/s	Taskflow.Executed	Mar 18, 20	25, 6:25:38 AM
Ov Ma ≣z Ma	ss Permissior	ns	0		Plants methy Spoten	High Packers day of an and	Taskflow.Executed	Jan 22, 20	25, 5:56:07 AM
大 Me	rge Contacts	3	0	Company Nation	Phone Merily Signature	https://dochopil.arthitesil.com/u.	Taskflow.Executed	Mar 13, 20	25, 7:45:52 AM
📞 Org	g Phone Num	bers	0		Planta identify Equators	https://www.cloudly-distort-poli-	Taskflow.Executed	Mar 17, 202	25, 4:28:32 AM
🛈 Rei	minder Scheo	dules	• 5 subscriptions						
OD Rep	portFusion								

- 1. Click on the Subscriptions tab.
- 2. Click the Create New Subscription button.

	sks 🖃 Project Hub 🦵 Mailroom		[≪] Filevine		Q. Search for a project	-
Advanced					Create New Subscription	<u>،</u>
\Xi Filter Menu	API Credentials				Webhook Signature* Filevine Identity Signature	
API Usage API Usage Auto-tags	API keys will be deprecated by the e Filevine data. Key have been limited support page.	nd of December 2025. After this di to a maximum of 3 per Filevine Org	ate, API keys will stop working and you will h . If you need more keys, please leverage Per	ave to migrate to Personal access tokens. Per sonal Access Tokens (PATs), which are not su	Sonal ac © Select Filewine Identity Signature or use an existing API Key Joint Comparison Name * Arctrieval New	
Clear Feed	Org* Arctrieval	•			4 Description* For Arctrieval Integration	l
Customs Editor	API Base URI Copy https://arctrievaldev.api.filevineapp.com/	Org API User FI Filevine Integration (1 07HTrNyF1s0WXDr@filev	42) ine.api		Endpoint* 5 https://legal.arctrieval.com/api/v2/integrations/ filevine/firmId/action-triggered	ļ
 Delete Batch DocGen Setup 	O- Credentials & Subscription	8			Events* ③ Select the event(s) you want to subscribe to: I Analysis.Job	,
E Fax Usage	Create New Subscription	AniKay	Endpoint	- Events	Appointment	~
Judicial Calendar	0	- Aprilog		Taskflow.Executed	ChainDeadline ~	,
• Mass Permissions	0	Heres Berlly Egentee Heres Berlly Egentee	High Padagal activities conta-	Taskflow.Executed	i Comment ~	,
 Mass Update Merge Contacts 	Improve the Strengton Long.	Planta Sorthy Signature	Nigo, Filmingal and reval convix.	Taskflow.Executed		-
C Org Phone Numbers	 5 subscriptions 	Planta derity Spoten	The resonary second the second	Taskflow.Executed	□ Document ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~	,
OD ReportFusion					🔲 Fax	~

- 3. Enter a Name for the Subscription.
- 4. Enter a Description for the Subscription.
- Enter the Endpoint URL using the following structure: https://legal.arctrieval.com/api/v2/integrations/filevine/*firmId*/action-triggered.



The *firmId* value is your Arctrieval ID for your account. You will need to contact Arctrieval support to get this value.

14

C Reminder Schedules	© 5 subscriptions	ProjectFunds v
00 ReportFusion		□ Roles V
20 Roles Setup		Section V
🍖 Service Accounts		□ Sms ~
Tag Manager	6	1 Taskflow
Task Utilities		Executed 7
i≣ Taskflow		Reset
Undelete		Teams ~
Users and Activity		
		Cancel Create

- 6. Scroll down the Events list to the Taskflow item and open the dropdown.
- 7. Click the button to enable Executed
- 8. Click the Create button.

After clicking Create, the following web page in the image is displayed.

🚍 🕴 Feed 🥝 Ta	sks 🖃 Project Hub 🦆 Mailroom		* Filevine		Q Search for a project	📃 🧔 🐠-
Advanced						
〒 Filter Menu	API Credentials					API Documentation
API Credentials API Usage H Auto-tags Ohyperiod	API keys will be deprecated by the e Filevine data. Key have been limited support page.	nd of December 2025. After this da to a maximum of 3 per Filevine Org	ate, API keys will stop working and you will h . If you need more keys, please leverage Pei	ave to migrate to Personal access tokens. F sonal Access Tokens (PATs), which are not	³ ersonal access tokens allow you to more secu subject to limits. Details about how to use PAT	urely grant API access to I's can be found on our Learn More
Client Portal Manager Contacts Setup	Org* Arctrieval	•				
Customs Editor	API Base URI Copy https://arctrievaldev.api.filevineapp.com/	Org API User Filevine Integration (1- 07HTrNyF1s0WXDr@filevi	42) ine.api			
 Delete Batch DocGen Setup 	Credentials & Subscription	15			0	
Fax Usage	Create New Subscription	Api Key	Endpoint	Events	Events Documents Last Modi	ntation C Refresh Subscriptions
Judicial Calendar	Annual Annual Test Annual Annual Test Annual Annual Annual Annual	Plantes Monthly Experiment	trips if the legal arcticles access	Taskflow.Executed	Mar 14, .	2025, 8:18:27 AM
Mass Permissions	0	Plante Molthy Reporters	High Pastlegal activations.	Taskflow.Executed	Mar 18, :	2025, 6:25:38 AM
≓, Mass Update	0	Plante Methy Spoten	Maps. Planning and the second	Taskflow.Executed	Jan 22, Mar 13,	2025, 5:56:07 AM 2025, 7:45:52 AM
Corg Phone Numbers	0	Plantes Healthy Reporters	The free clearly make spoke	Taskflow.Executed	Mar 17, 2	2025, 4:28:32 AM
 Reminder Schedules ReportFusion 	Arctrieval New For Arctrieval Integration 6 subscriptions	Filevine Identity Signature	Mps. Peelingst active at contra-	Taskflow.Executed	Mar 18, :	2025, 8:55:39 AM
 Roles Setup Service Accounts Tag Manager 		Arctrieval New St	ubscription is created.			

7.1. Test Filevine Link

Clicking the Test Filevine Link button verifies that Arctrieval can communicate with the Filevine account based on the provided Personal Access Token and subscription. If the test is successful, the dialog box is

displayed, as shown in the image.

If the test fails, please start troubleshooting the issue by updating the Personal Access Token entered into

Test Integration Information	×
Integration information has been verified. The authorization was successful.	
	CLOSE

Arctrieval and testing the Filevine Link.

7.2. Reset Mapping

Clicking the Reset Mapping button displays the dialog box shown in the image.

The Reset Mapping function resets custom values entered as the Filevine Section Sector and Filevine Field Selector to the Arctrieval default values. Once the values are reset, it cannot be undone.

Are you sure able to re-cor	you want to reset all field map figure the mapping manually.	pping values to default? The current custom settings will be deleted. You w	vill be
To reset all fi	eld mapping values to default	type the word reset :	
To reset an n	sia mapping raidee to deradit,	, , , =	
To reset all it		, yp	
		, yp	
		,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	

Any custom values must be re-entered into Arctrieval. To reset the values to default, type the word reset as indicated and click the Reset Mapping button.



Once the values are reset, they cannot be undone. Any custom values must be re-entered into Arctrieval.

7.3. Update Filevine Access token

If a valid connection between Filevine and Arctrieval exists, clicking the Update Filevine Access Token button displays the dialog box in the image.

Clicking the Next button displays the Update Filevine Access Token dialog box. This should only be used if there was an error in the original values when

Filevine Access Token Warning		×
Please confirm you want to change the Filevine Access Token information used by Arctrieval.		
	CANCEL	NEXT

the link between Filevine and Arctrieval was first established or if the Filevine account is migrating to a new instance.

7.4. Remove Filevine Access Token

Clicking the Remove Filevine Access Token button displays the Filevine Access Token Warning dialog

box, as shown in the image.

Filevine Access Token Warning		×
Are you sure you want to remove the Filevine Access Token from Arctrieval? Removing the Filevi the integration link between Filevine and Arctrieval.	ne Access Token wi	ll break
	CANCEL	NEXT

To continue, press the Next button, which will display the Confirm Filevine Access Token dialog box, as shown in the image. Clicking the Remove Filevine Access Token button will break the integration link between Filevine and Arctrieval.

Confirm Filevine Access Token Removal × Press Remove Access Token, to remove the Filevine Access Token from Arctrieval. Press Cancel, to stop the process. Removing the Filevine Access Token will break the integration link between Filevine and Arctrieval. Remove Access Token will break the integration link between Filevine and Arctrieval.

8. Standard Project Template Configuration

To move data between Filevine and Arctrieval, data fields must be added to sections for a Filevine Project Template and mapped to the appropriate data fields in Arctrieval. The Firm Filevine Administrator adds the necessary data fields and modifies the Filevine Account.

8.1. Importing Standard Arctrieval Sections

To use the default mapping settings, the ArctrievalClient.fvst, and ArctrievalRequest.fvst files must be imported into at least one Filevine Projects template. They may be imported into every Filevine Project template where records are needed for the case or claim. The following will walk you through the steps to import the files.

- 1. Log into your Filevine account. The account must have permission to edit sections of a Filevine project.
- 1. Go to the Advanced page.
- 2. In the left-hand menu, select Customs Editor. If you do not see the Advanced page or Customs Editor menu options, contact your Filevine system administrator or Filevine support to gain access to the necessary Filevine Functionality.
- 3. In the Choose a Project Type drop-down list, select the Project Type where you want to add the integration with Arctrieval.
- 4. Select Import Sections into: '<Selected Project Type>' from the Import/Export drop-down list. as shown in the image.

=	🗲 Feed	⊘ Tasks	■ Project Hub	f Mailroom	* Filevine	Q Search for a project	1	- VL
Adva	anced							
÷ Filt	ter Menu		瞷 Arctrio	Choose a Project Type -				
I AP	l Credentials							
🛆 AP	I Usage							
# Au	to-tags							
= Cle	ar Feed							
	ent Portal Ma	nager						
O Co	ntacts Setup							
🗘 Cu	stoms Editor							
🛗 De	adline Chains							
i De	lete Batch							
Do Do	cGen Setup							
🖪 Fax	< Usage							
្បាំ Int	egrations							
🕺 Ju	dicial Calenda	r						
n Ma	iss DocGen							
Or Ma	ss Permission	IS						
≡, Ma	ss Update							
犬 Me	rge Contacts							
Or	g Phone Numl	pers						
() Re	minder Sched	ules						
CO Re	porti-usion							
A RO	ruico Account							
1 0 30	Manager	5						
Tas	k Utilities							
i≣ Tas	skflow							
Un Un	delete							
🖄 Us	ers and Activi	ty						

- 5. Click the Choose Import File button and select a file with the .fvst extension. The step must be done for the ArctrievalClient.fvst and ArctrievalRequest.fvst files.
- 6. As shown in the image, the Arctrieval Client and Arctrieval Request sections are added to the Project section list after importing the configuration files. The Arctrieval Client and Arctrieval Request are used to gather information to submit Record Requests from Filevine to Arctrieval.

= 🖌 Feed 🧭 Task	s 🖃 Project Hub 「 Mailroom	[♠] Filevine	Q Search for a project
Advanced			
\Xi Filter Menu	Arctrieval Arctrieval Dem	no-Limited Sections -	🔅 Vitals Beta Import/Export 🗸 📋 🖨
 API Credentials 			
🛆 API Usage	Notes: Project only contains sections specific to	Arctrieval's integration. Client and Request and Dev .	
# Auto-tags	Sections $$ Vitals 🔘 Phases	E Folders	· · · · · · · · · · · · · · · · · · ·
🚍 Clear Feed	Anthrianal Dama Limited Continue Continue		
Client Portal Manager	Arctneval Demo-Limited Sections Sections	N	Create New Section
Contacts Setup			
Customs Editor	∲ !Dev		û 🗶 🍦
🛗 Deadline Chains	Custom Fields Collection		· ·
Delete Batch			
DocGen Setup	Arctrieval Client		ch @ *
🖪 Fax Usage	Custom Fields		
∏ [¶] Integrations	This is the default section for the additional Clie	int information needed by Arctrieval's software to process a request.	
🔦 Judicial Calendar			
Mass DocGen			
Or Mass Permissions	Activity		<u>ث</u>
₹ Mass Update	Activity (Built-in)		
1 Merge Contacts			
📞 Org Phone Numbers	Arctrieval Request		(Ť) (®) 🔺
C Reminder Schedules	Custom Fields Collection		
ReportFusion	This is the default section for the necessary info	prmation needed by Arctrieval's software to process a request for medical records, billing	records, or imaging studies.
20 Roles Setup			
Service Accounts			
Tag Manager			
Task Utilities			
}≡ Taskflow			
Undelete			
Users and Activity			

If you do not see the Import/Export tool as part of the Customs Editor in your Filevine account, you must contact Filevine Support or your Filevine Account Manager to enable the tool.

Alternatively, you can provide the .fvst files to Filevine and ask them to import the Arctrieval Client and Arctrieval Request sections.

If you still need assistance, please contact Arctrieval Support, and we can introduce you to a Filevine Consulting partner.

9. Additional Contact Field Used for Organizations (Optional)

Arctrieval can manage information about the department for a Medical Provider Contact in the Filevine Address Book when the contact in Filevine is an organization and not an Individual. When you select an

organization as the contact in Filevine, there is no default location to store information about a department.

Enabling the Additional Contact Field Option and adding a field to the Contact Card will cause Arctrieval to synchronize the Department name for an Arctrieval Contact on the Filevine contact card.

The second image
displays the
information for the
"Billing and Medical
Records"
department
synchronized

Contact Info		t Type is Organizat	ion, but there is	
Na	ime *	for Department in		lickname
	≗ <u>∎</u>			
0				
hone		Email		
😑 📞 Phone 👻	Phone Number	🛨 🕒 @ Email 👻	Email Address	*
Add Phone		C Add Email		
ddress				
	Street			
	Street 2			
Address *	City			
	ST Zip 💽 🖪			
• • • • • • • • • • •				

Add Tags	
Contact Info E Details Associated Projects	
Salutation 🚯	
Arctrieval Department Adding a Department enables Arctreival to synchronize department	artment 1 Filevine.
Heaith Information Management 🦰	

between Arctrieval and Filevine.

9.1. Enabling Department Field in Arctrieval

The first step is to enable the Additional Contact Field in Arctrieval by going to Settings -> Integrations and clicking the Enable Additional Contact Field button, as shown in the image.

≡ Arctrieval Spence	er & Smith						Jared V	′ishney ∽ ⑦HELP
n Dashboard	Users Account Plan a	and Billing Disburs	ement Account D	ocument Types	Document Templates	Integrations		
Clients	ENABLE ADDITIONAL CONTACT FIELD	RESET MAPPING	UPDATE FILEVINE	ACCESS TOKEN	TEST FILEVINE LINK	REMOVE FILEVIN	E ACCESS TOKEN	ADD CONTACT TYPE
Record Requests	FILEVINE INTEGRATION							
Contacts	Personal Access Token:	A0AEB62FAD						
Reports	Organization:	Arctrieval, ID: 18						
Forms	Last Updated On:	04/17/2025						
Settings	Is Filevine Contact Additional Fields Used:	No						
	Sections and Fields Contact Types							
	Filevine Section Selector Filevine Field Selector		Arctrieval Section	Arctrieval Field !	Name			
	arctrievalClient arctrievalClientLast4SSN		Client	Last 4 of SSN				EDIT
	arctrievalClient arctrievalClientAliases		Client	Aliases				EDIT

	arctrievalRequest	arctrievalRequestExpensesList	Request	Request Expenses List (All date values shown are in UTC time zone)	EDIT
	arctrievalRequest	arctrievalRequestExpensesTotal	Request	Request Expenses Total	EDIT
		arctrievalDepartment	Contact	Department	EDIT
© 2025 Arctrieval All Rights Reserved.				Rows per page: 50 👻 1 - 32 of 3	2 < < > >

An additional field is added to the field mapping table, as shown in the image.

The field has the following default properties:

- 7. Filevine Field Selector is arctrievalDepartment
- 8. Arctrieval Section is Contact
- 9. Arctrieval Field Name is Department

If you already have a field for a Medical Provider Department on the Contact Card, you can change the Filevine Field Selector value by clicking the Edit button and entering the existing value.

9.2. Adding Department Field to Filevine

Sign in to your Filevine account and navigate to the Contacts Setup tab in the Advanced menu. If you do not see the Contacts Setup menu you will need to get additional permissions for your Filevine User Account or have your firm's Filevine Administrator complete the following steps.

🚍 🕂 Feed 🖉 Task	ks 🔳 Project Hub	Mailroom		*	Filevine		Q Search for a project		1	- VL
Advanced										
= Filter Menu	📽 Arctrieval	Contact Template	Visibility Editor	Types & Labels				Cancel	Sav	• :
API Credentials										
API Usage	🌲 Previ	ew by Contact Types 🔨	Preview Dat	ta					- 1	
# Auto-tags	Q Filt	er	_						-	
🚍 Clear Feed			🖋 👺 Associate	d Projects +					- 1	
Client Portal Manager		ister				Abbreviated Name			- 1	
Contacts Setup		rnev								
Customs Editor		nt								
🛗 Deadline Chains	Cou	rt							- 1	
Delete Batch	Defe	endant							- 1	
DocGen Setup	Exp	ert				Gender			. 1	
Fax Usage	E Firm					Select an Option		Ŷ		
I Integrations	🗖 Insu	rance Company				Marital Status			. 1	
S Judicial Calendar	🗖 Invo	lved Party				Select an Option		~		
Mass DocGen	🗖 Judg	ge 👩							- 1	
Or Mass Permissions	Med	lical Provider 🖕 🧲				Driver License Number			. 1	
Mass Update	Plain	ntiff							1	
X Merge Contacts	Fiducia	ary				Social Security Number			. 1	
C Org Phone Numbers						123-45-6789			1	
Reminder Schedules	Bar Nu	mber							- 1	
& Roles Setun									- 1	
Service Accounts	Notes								- 1	
Tag Manager										
Task Utilities										

- 1. Navigate to the Contacts Setup menu.
- 2. Click on the Preview by Contact Types dropdown list.
- 3. Check the box next to Medical Provider.

≡ 🖸 Feed 🖉 Task	ks 🖃 Project Hub	Mailroom	* Filevine		Q Search for a project	
Advanced						
\Xi Filter Menu	📽 Arctrieval 🛛 😋	ontact Template Visibility Editor	Types & Labels			Cancel Save
API Credentials						
API Usage	🍐 Medical Pro	ovider 🗸 🔹 🕲 Preview Data				
# Auto-tags		4				_
🚍 Clear Feed	Contact In	fo 🖪 Details 💉 🛹 Associa	ted Projects			
Client Portal Manager	Salutation	9				
O Contacts Setup		5				
Customs Editor						
🛗 Deadline Chains	Notes					
Delete Batch						+
DocGen Setup						
🖬 Fax Usage						
If Integrations						
🔦 Judicial Calendar						
Mass DocGen						
Or Mass Permissions						
₹ Mass Update			۵	Add Field		
1 Merge Contacts						
📞 Org Phone Numbers						
O Reminder Schedules			€	Add Field Group		
OD ReportFusion	l					
P. Polos Sotup						

- 4. Click on the Details tab or another tab where you want to place information specific to Medical Provider Contacts.
- 🦆 Mailro JV Select Field Type × Advanced Q Filter Field Types × Sector Arctrieval ∓ Filter Menu Cancel Structural API Credentials Title 1. First 2. Next API Usage # Auto-tags Heade Instruction = Clear Feed Text Client Portal Manage abcdef ghijkl mnopq www. www. www. **O** Contacts Setup First abc abc Second Third www. def 🔹 Customs Editor One Line 🛬 Multi-line Text List Multi-line Larg URL List 🛗 Deadline Chains Note Delete Batch Numbers 🖹 DocGen Setup \$ % 123 1.23 🖪 Fax Usage Integrations Intege Decimal Currenc Percent <u> </u>Judicial Calenda Links Mass DocGen ₽₽ * www.
- 5. Click on Add Field

6. Select Text – One Line as the Field Type

Arctrieval <> Filevine Integration Setup Guide

😑 🕴 Feed 🖉 Task	is 🖪 Project Hub 🦆 Mailroom	Search for a project Ø
Advanced		abc Create Create Change
\Xi Filter Menu	Arctrieval Contact Temp	Field Prompt * 7
API Credentials		Arctrieval Department
🛆 API Usage	🛔 Medical Provider 🗸 💈	Field Selector *
# Auto-tags		
🚍 Clear Feed	Contact Info	
Client Portal Manager	Salutation 6	
Ocontacts Setup		
🕸 Customs Editor		Placeholder Text. 🚯
🛗 Deadline Chains	Notes	Placeholder Text
Delete Batch		Help Text 🚯
DocGen Setup		
🖪 Fax Usage		
Integrations		Visible for the Following Contact Types
🕺 Judicial Calendar		All None Custom Enter Contact Type
Mass DocGen		🛓 Medical Provider 🔺
Or Mass Permissions		3
➡ Mass Update	f	Cancel Create
1 Merge Contacts		
Crg Phone Numbers	i	

- 7. Enter Arctrieval Department as the Field Prompt. Filevine will automatically create the Field Selector as arctrievalDepartment. If you change the Field Selector value, you will need to enter the new value into the Arctrieval mapping table.
- 8. Click the Create Button.

Advanced Image: Contact Template Visibility Editor Types & Labels Cancel Save Image: April Credentials Image: Contact Template Visibility Editor Types & Labels Cancel Save	JV
Image: Series of the series	
	:
🛆 API Usage 🎽 Medical Provider 🗸 🗶 @ Preview Data	
# Auto-tags	
Clear Feed Contact into P Details P Associated Projects +	
Client Portal Manager Salutation	
Contacts Setup	
💠 Customs Editor	
Chains Arctrieval Department	
Delete Batch	
B DocGen Setup	
18 Fax Usage	
All Integrations	
🕱 Judicial Calendar	
The Mass DocGen	
Or Mass Permissions	
≓, Mass Update	
X Merge Contacts	
Corg Phone Numbers	

- 9. The Arctrieval Department field now appears on the Contact form.
- 10. Press Save to store the changes to your Filevine account.

10. Document Folder Configuration (Optional)

By default, Arctrieval saves all documents from your Arctrieval account into Sub-Folders in the main Documents Folder. Arctrieval will create one sub-folder for each request. If you want Arctrieval to save files in a specific folder automatically, follow the steps below. Begin by navigating to the Advanced menu as shown in the image.



- 1. Click on the Customs Editor
- 2. Click on the Folders tab.
- 3. Create a folder called Arctrieval Documents. This is optional. If you want to store the documents in an existing folder, creating a new folder is unnecessary.

Ξ 🖸 Feed 🧭 Tasks	🖽 Project Hub 📫 Mailroom	* Filevine	Q. Search for a project
Advanced			
Filter Menu		B Durdens Durdlag Datum	
API Credentials		Se Custom Section Sector. This is a Collection section. You will be able to add multiple items, each with the fields and widgets below.	
API Usage		Show Collection Options	
Auto-tags		Custom Eields (Widnate	
Clear Feed		Custom Fields/ Mogets	
Client Portal Manager		Requested Information (Dropdown List)	[3.0] 🔟
Contacts Setup		Requested Information Other (Text - Single Line)	[3.1] 🖤
Customs Editor		Actual Requested Information (Text - Multiple Lines)	[4,0] 🖤
Deadline Chains		Starting Date of Service (Date)	[5,0] 🞍
Delete Batch		Ending Date of Service (Date)	(51)
DocGen Setup		Descret Date (Deta)	
Pax Usage		Request Date (Date)	[6,0] 🗸
kutisial Calendar		Request Status (Text - Single Line)	[6,1] 🞍
Mass DocGon		Request Due Date (Date)	(7.0)
Mass Permissions		Last Activity Date (Date)	[7.1] 🖤
Mass Update		Completed Date (Date)	[8.0]
Merge Contacts		Request Expenses Total (Amount - Currency like \$0.00)	1811
Org Phone Numbers			
Reminder Schedules		History (Ali date values snown are in UTC time zone) (lext - Multiple Lines)	[9,0] 🗸
ReportFusion		Request Expenses List (Text - Multiple Lines)	[10,0]
Roles Setup	· · · · · · · · · · · · · · · · · · ·	Arctrieval Files Documents (Multiple File Attachments (List))	[11,0] 🔟
Service Accounts		Is Request From Arctrieval (Yes/No)	(12,1) 🖤
Tag Manager		Add Field/Midrat	
Task Utilities		And Liew Lives	
Taskflow	Remove this Section		×
Undelete			

4. Click on the Sections tab in the Customs Editor, navigate to the Arctrieval Request section, expand the Custom Fields/Widgets, and scroll down to the Arctrieval File Documents (Multiple File Attachments (List)).

= 🕴 Feed 🞯 Tasks	🖽 Project Hub 🛛 🗯 Mailroom	Citatino	Q. Search for a pr	ojact 📃 🧟 🛶
Advanced				
		Field Type Multiple File Attachments (List) ~		
- Filter Menu	Custom Section Setu	Field Prompt		
API Credentials	This is a Collection section.	Arctrieval Files Documents		
🛆 API Usage	Show Collection Options	Field Selector		
# Auto-tags	Custom Fields (Wideota	arctrievalFilesDocuments		
III Clear Feed	Custom Heides mogers	{{arctrievalRequest.arctrievalFilesDocuments}}		
Client Portal Manager	Requested Information (D	Auto-tags 🚯	[3.0] 🔶	
O Contacts Setup	Requested Information Ot	Search tags	[3,1] 👽	
🛱 Customs Editor	Actual Requested Inform	Auto-move to Folder ()	[4.0] +	
🛅 Deadline Chains		Es A {{Name}}/02. Arctrieval Documents 🗙		
Delete Batch	Starting Date of Service (L		[5.0] 🔶	
DocGen Setup	Ending Date of Service (D	{{Name}}	[5.1] 🖤	
🖬 Fax Usage	Request Date (Date)	 OI. Intake 	[6.0] 🖝	
Integrations	Request Status (Text - Sin	02. Arctrieval Documents	16.11	
🖄 Judicial Calendar		04. Liens	loid .	
Mass DocGen	Request Due Date (Date)	 06. Medical Records 	[7.0] 🔸	
Ov Mass Permissions	Last Activity Date (Date)	 07. Pleadings and Motions 08. Disclosures 	[7,1] 🖤	
≡, Mass Update	Completed Date (Date)		[8.0] •	
1 Merge Contacts	Request Expenses Total (#	Advanced Properties	[8,1] 🔟	
📞 Org Phone Numbers	History (All data values ab			
T Reminder Schedules	Plistory (All date values sh	Remove this Field Cancel Update	ta'ol 🍝	
OD ReportFusion	Request Expenses List (Te		[10,0] 🔶	
a Roles Setup	Arctrieval Files Documents	(Multiple File Attachments (List))	[11,0] 🖤	
C Service Accounts	Is Request From Arctrieval	Yes/No)	[12,1] 🖤	

- 5. Click the down arrow in the Auto-move to Folder dropdown to show the list of available folders.
- 6. Click on the folder where you want Arctrieval to save the documents sent from Arctrieval to the Filevine project
- 7. Click on Update to save the changes.

≡ 🖸 Feed 🛛 Tasks	🖽 Project Hub 🛛 🧯 Mailroom			oject 📃 🧔 🞰 -
Advanced		Edit Arctrieval Files Documents Field Template X		
\Xi Filter Menu		Multiple File Attachments (List)		
API Cradantials	Custom Section Set This is a Collection section	Field Prompt		
API Usage	Continue Collection Ontinue	Arctrieval Files Documents		
# Auto-tags		Field Selector		
I Clear Feed	Custom Fields/Widgets	IncrinevalPlesubocuments		
Client Portal Manager	Requested Information (Auto-tags ()	[3.0] 🔟	
Contacts Setup	Requested Information C	Search tags	[3,1] 🛡	
Customs Editor	Actual Requested Inform	Auto-move to Folder ()	[4,0] 👻	
Deadline Chains		E: V {{Name}}/02. Arctrieval Documents 🗙		
Delete Batch	Starting Date of Service		[5,0] 👻	
DocGen Setup	Ending Date of Service (Advanced Properties	[5,1] 🔹	
💼 Fax Usage	Request Date (Date)	9	[6.0] 🖝	
Integrations	Request Status (Text - S	Remove this Field Cancel Update	[6,1] 🐳	
🛃 Judicial Calendar	Request Due Date (Date		[7,0] •	
Mass DocGen	Last Artivity Data (Data)		[71] +	
Or Mass Permissions			trai 🗨	
≡ Mass Update	Completed Date (Date)		[8.0] 🔶	
X Merge Contacts	Request Expenses Total	(Amount - Currency like \$0.00)	[8,1]	
C Org Phone Numbers	History (All date values a	hown are in UTC time zone) (Text - Multiple Lines)	[9.0] 🔹	
ReportFusion	Request Expenses List (fext - Multiple Lines)	[10.0] 💌	
In Roles Setup	Arctrieval Files Documer	ts (Multiple File Attachments (List))	[11,0] 🐳	
Service Accounts	Is Bequest From Arctrise		[121]	
Tag Manager			fueld a	
Task Utilities	Add Field/Widget			
i⊟ Taskflow	C Deserve this Peoples			
Undelete	S Nemove das Section			× Save
Users and Activity				
	Docs			ئ 1
	Docs (Built-in)			· ·

- 8. The document folder path for the Auto-move to Folder is now displayed.
- 9. Click on update again to close the dialog box.

10.1. Sub-folders

Arctrieval can automatically create and store all request-related documents in a unique sub-folder in the Docs section as shown in the image.

	🗲 Feed 🔗 Tasks 🖃 Project Hub 🆆 I	Mailroom Filevine	Q Search for a project	ō et 🖪 🤊 🛶-
СТ	Cinderella Termaine vs. Pumpkin Sta	agecoach Service (MVA) cindy@m-c-unlimited.com		Active 👻 Vitals 🔀 👻
₹	Folders Cinderella Termaine vs. Pumpkin Stagecoach Service (M VA) 0.08. Disclosures 0.7. Pleadings and Motions 0.6. Medical Records 0.5. Demand and Offers of Judgement 0.4. Liens 0.3. Cilent Documents 0.2. Arctrieval ID AADV-0950 0.1. Intake 0.0. Attorney Work Folder	EQ Filter docs Arctrieval > Cinderella Termaine vs. Pumpkin Stagecoa Record_Request_AADV-0950_Termaine_06-22-2025	x Q Search Deeper 1 m Most Re c.ch Service (MVA) > 02. Arctrieval Documents _14-12.pdf me (425.60 KB) Jun 22, 2025	It Name ▼ > Arctrieval ID AADV-0950 ▼ Image: A constrained of the second of the seco
٩				

If you want Arctrieval to create the sub-folders within the specified Auto-move to Folder, you must enter the Auto-folder information as part of the integration values in Arctrieval. At the end of the list in the Sections and Fields tab on the Integrations pages is the docs value as shown in the image.

= Arctrieval Spence	er & Smith						Jared Vishney	Jared Vishney	∽ @HELP
🏫 Dashboard	Users	Account	Plan and Billing	Disbursement Account	Document Types	Document Template:	s Integrations		
Clients	DISABLE ADDITION	NAL CONTACT FIELD	RESET MAPPING	UPDATE FILEVINE ACC	CESS TOKEN	TEST FILEVINE LINK	REMOVE FILEVINE ACCES	ADD ADD	CONTACT TYPE
Record Requests	FILEVINE INTEGRATIC	N							
Contacts	Personal Access Token:		A0AEB62FA	þ					
E Reports	Organization:		Arctrieval, ID:	18					
Forms	Last Updated On:		04/17/2025						
Settings	Is Filevine Contact Addition	onal Fields Used:	Yes						
	Sections and Fields	Contact Types							
	Filevine Section Selector	Filevine Field Selector		Arctrieval Section	Arctrieval Field N	lame			
	arctrievalRequest	Provider		Request	Contact (Medie	cal Provider)			EDIT
	arctrievalRequest	isRequestFromArctr	ieval	Request	Is Request Fro	m Arctrieval			EDIT
	arctrievalRequest	arctrievalRequestEx	pensesList	Request	Request Expen	nses List (All date values sh	own are in UTC time zone)		EDIT
	arctrievalRequest	arctrievalRequestEx	pensesTotal	Request	Request Expen	ases Total			EDIT
		arctrievalDepartmen	t	Contact	Department				EDIT
	docs			Request	Documents & F	Files			EDIT
© 2025 Arctrieval All Rights Reserved.							Rows per page: 50 💌	1 – 33 of 33 <	$\langle \rightarrow \rightarrow $

1. Click the Edit button to display the Update Filevine Folder Mapping dialog box as shown.

2.	Enter the				
	Filevine	Update Filevine Fold	er Mapping	:	×
	Folder Name				
	where the	Filevine Folder Name 02. Arctrieval Documents	2		
	documents				
	will be saved.	Arctrieval Section:	Request		
3.	Click the	Arctrieval Field Name:	Documents & Files		
	Update				
	button.	Note, upon saving the change Filevine. No custom field map	s, the system will begin saving Arctrieval documen ping validation will be triggered.	nts and files into the configured folder in	
				3)
				CANCEL	j
	l				

Confirm that the value was correctly saved in the Sections and Fields list docs variable. In this case, "02. Arctrieval documents" was saved as shown in the image.

docs 02. Arctrieval Documents Request Documents & Files

Arctrieval will now create sub-folders to store the information for each request in Filevine.

Additional Contact Types Configuration (Optional) 11.

When importing a Client or Contact from Filevine into Arctrieval, Arctrieval relies on the Contact Type to determine if the information should be placed into the Client or Contact table. By default, Arctrieval assumes Clients use the Client Contact Type and Contacts use the Medical Provider Contact Type as shown in the image below. These values are system defaults that cannot be modified or deleted.

■ Arctrieval Spence	er & Smith							Jared Vishney ~	⑦HELP
♠ Dashboard	Users	Account	Plan and Billing	Disbursement Account	Document Types	Document Templates	Integrations		
Clients	ENABL	E ADDITIONAL CONTACT	FIELD RESET M.	APPING UPDATE FIL	EVINE ACCESS TOKEN	TEST FILEVINE LINK	REMOVE FILEVINE	ACCESS TOKEN ADD CO	ONTACT TYPE
Record Requests	FILEVINE INTEGRAT	ION							
Contacts	Personal Access Toker	n:	A0AEB6	2FAD					
Reports	Organization:		Arctrieval,	ID: 18					
Forms	Last Updated On:		04/17/202	25					
Settings	Is Filevine Contact Add	litional Fields Used:	No						
	Sections and Fields	Contact Types							
	Filevine Contact Tag Name		Arctrieval Category	Comment	Status	Update Date			
	Client		Client	Default Val	ue Enable	d		EDIT	DELETE
	Medical Provider		Contact	Default Val	ue Enable	d		EDIT	DELETE
							Rows per page: 10	▼ 1-2 of 2 <	< > >1

Filevine allows for multiple Contact Types to be assigned to a Contact record. Sometimes, other values may indicate that a contact record belongs to a client, such as a "Potential Client," "PI Client," or "SSD Client." Similarly, other values may indicate a Contact record belongs to a medical provider such as

"Hospital," "Doctor," "Urgent Care," or "Ambulance." As	Mc Magic Kingdom Medical Center Medical Provider Hospital Cancel Save						
shown in the image.	Name Name Name Name Name Name Name Name	e * Magic Kingdom Medical Ce	nter	Nickname			
	Phone		Email				
	😑 🐛 Phone 👻	(480) 741-1111	🛨 🖨 🕲 Email 🗸	info@m-c-unlimited.com	*		
	Add Phone		Add Email				
	Address						
		123 Main Gate Drive					
		Street 2					
	G Q Address -	Northern Pike					
		PA 85000 🕂 💽					
	C Add Address						

Arctrieval enables you to associate multiple Filevine Contact Types with Clients or Contacts. Clicking the Add Contact Type button shows the following dialog box.

To add Type:	a Contact	Add New Filevine Contact Type	×
1.	Enter the Filevine Contact Type Name in the	Filevine Contact Type Name:* Hospital Arctrieval Category:* Client Contact	_
2.	space provided. Check the box	Comment:	_
	to indicate which	CANCEL ADD CONTACT TYPE	Ξ

Arctrieval Category the Contact Type belongs to.

- 3. Enter any Comment related to the Contact Type.
- 4. Click the Add Contact Type button.

A confirmation dialog box is displayed when the action is successful.

Add New Filevine Contact Type	×
Add New Filevine Contact Type	×
The new type has been successfully added to the mapping.	
	CLOSE
	CANCEL ADD CONTACT TYPE

The new Contact

Type is displayed in the Contact Types tab on the Integration page as shown.

≡ Arctrieval [™] Spence	er & Smith							Jared Vi	shney ~	@HELP
Dashboard	Users	Account	Plan and Billing	Disbursement Account	Document Types	Document Templates	Integrations			
2 Clients	ENABL	E ADDITIONAL CONTACT	FIELD RESET M	APPING UPDATE FILI	EVINE ACCESS TOKEN	TEST FILEVINE LINK	REMOVE FILEVIN	E ACCESS TOKEN	ADD CO	NTACT TYPE
Record Requests	FILEVINE INTEGRAT	ION								
Contacts	Personal Access Token	c	A0AEB6	2FAD						
Reports	Organization:		Arctrieval,	ID: 18						
Forms	Last Updated On:		04/17/20	25						
Settings	Is Filevine Contact Add	itional Fields Used:	No							
	Sections and Fields	Contact Types								
	Filevine Contact Tag Name	Arc	trieval Category	Comment		Status U	Ipdate Date			
	Client	Cli	ent	Default Value		Enabled			EDIT	DELETE
	Hospital	Co	ntact	Additional Medical Prov	vider Type	Enabled 0	14/17/2025		EDIT	DELETE
	Medical Provider	Co	ntact	Default Value		Enabled			EDIT	DELETE
							Rows per page: 10	0 ▼ 1 - 3 of 3	1<	$\langle \rangle \rangle$

12. Custom Project Section Configuration

If the default appearance of the sections, the layout of the elements does not match what you want to achieve from the integration, or you want to include the Arctrieval variables in an existing section, you will need to add the information to a section and adjust the field mapping.

Each field must satisfy specific requirements, including the correct section type, field type, field properties, and their locations relative to other fields. The section and field requirements for the 28 fields used by Arctrieval are outlined in the tables below.

If the widgets defined in the arctrievalClient or arctrievalRequest tables were added to different sections in Filevine, the Filevine Section Selector and Filevine Field Selector values must be mapped to the appropriate Arctrieval data fields.

For example, if the Filevine Project template has an Intake Section with information about the client, that is a good location for the arctrievalClient data fields. If the Filevine Project template contains a Medical Provider Section, that is a good location for the arctrievalRequest data fields.

The default values in the ArctrievalClient.fvst and ArctrievalRequest.fvst files are displayed on the Integration tab in the Section and Fields tab under the Settings menu.

■ Arctrieval Spence	er & Smith							Jared V	ishney ~ (ЭНЕГЬ
🔒 Dashboard	Users	Account	Plan and Billing	Disbursement Account	Document Types	Document Templates	Integrations			
🔐 Clients	ENABLE A	DDITIONAL CONTACT FI	ELD RESET M	UPDATE FIL	EVINE ACCESS TOKEN	TEST FILEVINE LINK	REMOVE FILEVINE	ACCESS TOKEN	ADD CONTA	ACT TYPE
Record Requests	FILEVINE INTEGRATION	4								
Contacts	Personal Access Token:		A0AEB6	FAD						
Reports	Organization:		Arctrieval,	D: 18						
Forms	Last Updated On:		04/17/202	5						
Settings	Is Filevine Contact Addition	nal Fields Used:	No							
	Sections and Fields	Contact Types								
	Filevine Section Selector	Filevine Field Selec	tor	Arctrieval Secti	on Arctrieval Fiel	ld Name				
	arctrievalClient	arctrievalClientL	ast4SSN	Client	Last 4 of SS	ŝN				EDIT
	arctrievalClient	arctrievalClientA	liases	Client	Aliases					EDIT
	arctrievalClient	arctrievalLangua	gePreference	Client	Language P	reference				EDIT
	arctrievalClient	arctrievalPatient	PhotoID	Client	Patient's Ph	ioto ID				EDIT
	arctrievalClient	arctrievalIntakeF	orm	Client	Arctrieval In	take Form				EDIT

The following requirements must be met to avoid errors when mapping the fields.

- 1. All fields in the list must be mapped to the correct fields in Filevine. The fields cannot have a duplicate combination of Section Selector and Field Selector values or there will be errors in the data sent from Filevine to Arctrieval.
- 2. All fields for the Arctrieval Request Section must be in the same Filevine project section.
- 3. All fields for the Arctrieval Request Section must be in a Filevine project section that is a collection.
- 4. All fields for the Arctrieval Client Section must be in sections of the Filevine project that are not collections.
- 5. The Section Selector and Field Selector values must meet the following conditions:
 - a. The specified section exists for the selected project type,
 - b. The specified field exists for the selected section, and
 - c. The field is the correct type and configuration.

12.1. Arctrieval Client Section

To process a request, Arctrieval needs additional information about the Client, which is not part of the default Filevine Contact Information. The required client information is specific to the Filevine Project for the client. There are two options to configure Filevine:

- 1. Use the pre-built Arctrieval Client section and import it into an existing Project Template in Filevine using the provided ArctrievalClient.fvst file. The process is described earlier in the document.
- 2. Add the required Custom Fields/Widgets to an existing Section already defined in an existing Project template through the Filevine Customs Editor. Any changes to the Filevine Section Selector or Field Selector values in Filevine must be updated on the Arctrieval Setting -> Integration tab.

Widget Type	Header Text	Widget Selector	Row	Order in Row	Visibility	Visibility Property	Locked	Notes
Sub Section Header	Arctrieval Client Information	arctrievalClientInformation {{arctrievalClient. arctrievalClientInformation}}	X	0	Show	Always	False Unchecked	
Instructions	Data Update Notes	one direction	X + 9	0	Show	Always	False Unchecked	Important Note: == After the Send Request to Arctrieval Task Flow was completed for one request in the project, updating this data will not update the data in Arctrieval. To update the data in Arctrieval, you must log into Arctrieval and manually update the specific data for the Client in Arctrieval. Any changes made here after a request is sent to Arctrieval are ignored.

The values in the table below show the information in the ArctrievalClient.fvst file. The Section Selector is arctrievalClient {{arctrievalClient.field}}.

Field Type	Field Prompt	Field Selector	Row	Order in Row	Visibility	Visibility Property	Required	Locked	Notes
Text-Single Line	Arctrieval Client Last 4 of SSN	arctrievalClientLast4SSN {{arctrievalClient. arctrievalClientLast4SSN}}	X + 1	0	Show	Always	False Unchecked	False Unchecked	
Text-Single Line	Arctrieval Client Aliases	arctrievalClientAliases {{arctrievalClient. arctrievalClientAliases}}	X + 1	1	Show	Always	False Unchecked	False Unchecked	
Dropdown List	Arctrieval Language Preference	arctrievalLanguagePrefere nce {{arctrievalClient. arctrievalLanguagePrefere nce}}	X + 1	2	Show	Always	False Unchecked	False Unchecked	Dropdown Items: - English, - Spanish Display As: - Dropdown
File Attachment	Arctrieval Patient's Photo ID	arctrievalPatientPhotoID {{arctrievalClient. arctrievalPatientSPhotoID} }	X + 2	0	Show	Always	False Unchecked	False Unchecked	Auto-tags - None Auto-move to Folder - None
File Attachment	Arctrieval Intake Form	arctrievalIntakeForm {{arctrievalClient. arctrievalIntakeForm}}	X + 2	1	Show	Always	False Unchecked	False Unchecked	Auto-tags - None Auto-move to Folder - None
Yes/No	Arctrieval Personal Representati ve	arctrievalPersonalReprese ntativeBoolean {{arctrievalClient. arctrievalPersonalReprese ntativeBoolean}}	X + 3	0	Show	Always	False Unchecked	False Unchecked	
Text-Single Line	Arctrieval Personal Representati ve First Name	arctrievalPerRepFirstNam e {{arctrievalClient. arctrievalPerRepFirstNam e}}	X + 4	0	Show	When "Arctrieval Personal Representative" Equals: Yes	True Checked	False Unchecked	
Text-Single Line	Arctrieval Personal Representati ve Last Name	arctrievalPerRepLastName {{arctrievalClient. arctrievalPerRepLastName }}	X + 4	1	Show	When "Arctrieval Personal Representative" Equals: Yes	True Checked	False Unchecked	
Dropdown List	Arctrieval Personal	arctrieval Personal Rep Rela tionship	X + 5	0	Show	When "Arctrieval Personal	True Checked	False Unchecked	Dropdown Items: - Parent, - Legal Guardian

Field Type	Field Prompt	Field Selector	Row	Order	Visibility	Visibility Property	Required	Locked	Notes
	Representati ve Relationship	{{arctrievalClient. arctrievalPersonalRepRela tionship}}		in Row		Representative" Equals: Yes			- Medical Power Of Attorney, - Next Of Kin,- Other Display As: - Dropdown
Text-Single Line	Arctrieval Personal Representati ve Relationship Other	arctrievalPersonalRepOth er {{arctrievalClient. arctrievalPersonalRepOth er}}	X + 6	0	Show	When "Arctrieval Personal Representative Relationship" Equals: Other	True Checked	False Unchecked	
File Attachment	Arctrieval Personal Representati ve's Photo ID	arctrievalPersonalRepPhot oID {{arctrievalClient. arctrievalPersonalRepPhot o}}	X + 7	0	Show	When "Arctrieval Personal Representative" Equals: Yes	False Unchecked	False Unchecked	Auto-tags - None Auto-move to Folder - None
File Attachment	Arctrieval Personal Representati ve Relationship Documentati on	arctrievalPersonalRepRelD oc {{arctrievalClient. arctrievalPersonalRepRelD oc}}	X + 7	1	Show	When "Arctrieval Personal Representative" Equals: Yes	False Unchecked	False Unchecked	Auto-tags - None Auto-move to Folder - None

Notes:

- 1. The Arctrieval widgets and field type can be placed anywhere in the target section, such as at the beginning, middle, or end. As such, the Row value X represents where the Subsection Header is placed. The placement for all other widgets and fields directly relates to the Arctrieval Sub Section Header placement.
- 2. The Obsolete option is not displayed in the above table because the value will always be False-Unchecked.

12.2. Arctrieval Request Section

Arctrieval needs information for each Request to process it, such as the Contact, Dates of Service, Information to Request, Type of Request, etc... Request information is needed for each request sent from Filevine to Arctrieval. A Filevine Project can have multiple requests for medical records, billing information, and imaging studies. There are two options to configure Filevine:

- 1. Use the pre-configured Arctrieval Request section and import it into an existing Project Template in Filevine using the provided ArctrievalRequest.fvst file. The process is described earlier in the document.
- 2. Add the required Custom Fields/Widgets to an existing Section already defined in an existing Project template through the Filevine Customs Editor. Any changes to the Filevine Section Selector or Field Selector values in Filevine must be updated on the Arctrieval Setting -> Integration tab.

The values in the table below show the information in the ArctrievalRequest.fvst file. The section selector is arctrievalRequest {{arctrievalRequest.field}}.

Widget Type	Header Text/	Widget Selector	Row	Order	Visibility	Visibility Property	Locked	Notes
	Widget Prompt			in Row				
Sub Section	Arctrieval	arctrieval	Х	0	Show	Always	False	
Header	Record	{{arctrievalRequest.arct					Unchecked	
	Request	rievalRecordRequest}}						
Action	Send Request	SendArctrievalRequest	Х	1	Show	"Hide" When "Is	False	Action Button Type:
Button	to Arctrieval	{{arctrievalRequest.				Request from	Unchecked	Taskflow Tigger Button
		sendRequestToArctriev				Arctrieval" Equals		
		al}}				"Yes"		Button Icon: Send
								Widget Selector:
								sendRequestToArctrieval

Field Type	Field Prompt	Field Selector	Row	Order in Row	Visibility	Visibility Property	Required	Locked	Notes
Dropdown List	Request Type	arctrievalRequestType {{arctrievalRequest. arctrievalRequestType}}	X + 1	0	Show	Always	True Checked	False Unchecked	Dropdown Items: - Patient Directed to 3 rd Party, Patient Directed to Self Display As: - Dropdown
Person	Contact (Medical Provider)	Provider {{arctrievalRequest.Provid er}}	X+1	1	Show	Always	True Checked	False Unchecked	Limit to Contact Type: Medical Provider
Text – Single Line	Arctrieval ID	arctrievalID {{arctrievalRequest. arctrievalID}}	X + 1	2	Show	Always	False Unchecked	True Checked	Value comes from Arctrieval—No Filevine user enter.
Dropdown List	Requested Information	arctrievalRequestedInfor mation {{arctrievalRequest. arctrievalRequestedInfor mation}}	X + 2	0	Show	Always	True Checked	False Unchecked	Dropdown Items: - All Billing Records, All Medical Records, All Imaging Studies, Other Display As: - Dropdown
Text – Single Line	Requested Information Other	arctrievalRequestedInfor mationOther {{arctrievalRequest. arctrievalRequestedInfor mationOther}}	X + 2	1	Show	When "Arctrieval Requested Information" Equals: Other	True Checked	False Unchecked	
(Text – Single Line) or (Text – Multiple Lines)	Actual Requested Information	arctrievalActualRequested Information {{arctrievalRequest. arctrievalActualRequested Information}}	X + 3	0	Show	Always	False Checked	True Checked	Values will come from Arctrieval.
Date	Starting Date of Service	arctrievalStartingDateOfS ervice {{arctrievalRequest. arctrievalStartingDateOfS ervice}}	X + 4	0	Show	Always	True Checked	False Unchecked	After the value is finalized in Arctrieval and a request is submitted, Arctrieval will overwrite any user edits in Filevine.

Field Type	Field Prompt	Field Selector	Row	Order in Row	Visibility	Visibility Property	Required	Locked	Notes
Date	Ending Date of Service	arctrievalEndingDateOfSer vice {{arctrievalRequest. arctrievalEndingDateOfSer vice}}	X + 4	1	Show	Always	True Checked	False Unchecked	Value comes from Arctrieval after the request is sent; Arctrieval will overwrite any user edits in Filevine.
Date	Request Date	arctrievalRequestDate {{arctrievalRequest. arctrievalRequestDate}}	X + 5	0	Show	Always	False Unchecked	True Checked	Value comes from Arctrieval after the request is sent.
Text – Single Line	Request Status	arctreivalRequestStatus {{arctrievalRequest. arctrievalRequestStatus}}	X + 5	1	Show	Always	False Unchecked	True Checked	Value comes from Arctrieval after the request is sent.
Date	Request Due Date	arctrievalRequestDueDate {{arctrievalRequest. arctrievalRequestDueDate }}	X + 6	0	Show	Always	False Unchecked	True Checked	Value comes from Arctrieval after the request is sent.
Date	Last Activity Date	arctrievalLastActivityDate {{arctrievalRequest. arctrievalLastActivityDate} }	X + 6	1	Show	Always	False Unchecked	True Checked	Value comes from Arctrieval after the request is sent.
Date	Completed Date	arctrievalCompletedDate {{arctrievalRequest. arctrievalCompletedDate} }	X + 7	0	Show	Always	False Unchecked	True Checked	Value comes from Arctrieval after the request is sent.
Amount – Currency like \$0.00	Request Expenses Total	arctrievalRequestExpense sTotal {{arctrievalRequest.arctrie valRequestExpensesTotal} }	X+7	1	Show	Always	False Unchecked	True Checked	Value comes from Arctrieval after the request is sent and expense values exist.
Text – Multiple Lines or (Text – Multiple Lines(Large)	History (All date values shown are in UTC time zone)	arctrievalHistory {{arctrievalRequest. arctrievalHistory}}	X + 8	0	Show	Always	False Unchecked	True Checked	Value comes from Arctrieval after the request is sent.

Field Type	Field Prompt	Field Selector	Row	Order in Row	Visibility	Visibility Property	Required	Locked	Notes
Text – Multiple Lines or (Text – Multiple Lines(Large)	Request Expenses List	arctrievalRequestExpense sList {{arctrievalRequest.arctrie valRequestExpensesList}}	X + 9	0	Show	Always	False Unchecked	True Checked	Value comes from Arctrieval after the request is sent.
Multiple File Attachments (List)	Files & Documents	arctrievalFilesDocuments {{arctrievalRequest. arctrievalFilesDocuments} }	X + 10	0	Show	Always	False Unchecked	True Checked	Files come from Arctrieval. Auto-tags - None Auto-move to Folder - None
Yes/No	ls Request From Arctrieval	isRequestFromArctrieval {{arctrievalRequest.isRequ estFromArctrieval}}	X + 11	1	Show	When "Arctrieval ID" Equals AAAA-0000	False Unchecked	True Checked	

Notes:

 No additional settings for the Taskflow Action button are needed within Filevine because the trigger is a standard event. The only condition to work is that the Widget Selector Value matches what is specified in the Arctrieval <> Filevine mapping. When the Taskflow button is pressed, Filevine triggers certain actions, and Arctrieval users the webhook trigger event. Arctrieval receives an API request that contains information about which button in which project for which company was pressed and processes information by creating a Record Request.

The mechanism is configured when the Filevine integration information is entered, and the subscription is created. No other actions are required on the part of the user.

12.3. Edit Field Mapping

Click on the Edit button to display the	Update Filevine Sect	ion and Field Selector Mapping		×
Update Filevine Section and Field	Filevine Section Selector: *			
Selector Mapping dialog box, as shown in the image.	Filevine Field Selector: * arctrievalClientLast4SSN			
Enter the new values	Arctrieval Section:	Client		
for the Filevine Section Selector or	Arctrieval Field Name:	Last 4 of SSN		
Filevine Field Selector, and press the Update button.			CANCEL	UPDATE

Selector value was changed from arctrievalClient to Intake in the example.

Pressing the Update button displays the Verify Field Mapping dialog box, as shown in the image.

If you update multiple values, you can verify each update as you go or wait until all the changes are made and verify the

Verify Field Mapping	I	×
Do you want to verify the followi	ng field mapping?	
Filevine Section Selector:	Intake	
Filevine Field Selector:	arctrievalClientLast4SSN	
Arctrieval Section:	Client	
Arctrieval Field Name:	Last 4 of SSN	
		CANCEL VERIFY MAPPING

mapping for all Section Selectors and Field Selectors.

Clicking the Verify Mapping button displays the dialog box shown in the image.

Select the Filevine Project Type to use to verify the field mapping. Arctrieval can be configured to work

with multiple Filevine Project Types. Once the Project type is selected, Arctrieval immediately attempts to verify the field mapping.

Verify Field Mapping	×
Select the Filevine Project Type to verify the field mapping:	
Filevine Project Type: *	·
	CLOSE

12.4. Field Mapping Errors

If there is an issue or error with the Section Selector mapping, the system displays the dialog box in the image.

erify Field Mappir	Ig	
Select the Filevine Project Typ	e to verify the field mapping:	
Filevine Project Type: *		
Arctrieval Client and Requ	est Test	•
The following fields were conf Filevine Field Selector:	igured incorrectly in Filevine:	Joneeuy.
Arctrieval Field Name:	Last 4 of SSN	
Error:	Section is missed.	
		CLOSE

Arctrieval determined that the Section on the Filevine Project does not exist. The Filevine Section Selector value entered into Arctrieval does not match the value for any sections in the project. Correct the value in Arctrieval or edit the value in Filevine to match the value in Arctrieval.

If there is an issue or error with the Flied Selector mapping, the system displays the dialog box in the image.

Arctrieval	Vorify Field Mannin	a		×				
determined that the		9						
Field in the Section on the Filevine Project does not exist The Filevine	Select the Filevine Project Type Filevine Project Type: * Arctrieval Client and Reque	e to verify the field mapping	g:	•				
Field Selector value	There are errors in the Filevine	field mapping that will pre	vent the integration with Arctrieval from functioning correctly.					
entered into	ntered into The following fields were configured incorrectly in Filevine:							
Arctrieval does not	Filevine Field Selector:	arctrievalClient.arct	rievalClientLast4SSNs					
match the field value in the specified	Arctrieval Field Name:	Last 4 of SSN						
sections in the	Error:	Field is missed.						
project. Correct the								
value in Arctrieval or								
edit the value in			CL	OSE				
Filevine to match the								
value in Arctrieval.								

The values for field mapping errors are highlighted in red in the mapping table, as shown in the image.

≡ Arctrieval Spend	er & Smith							Jared V	′ishney ∽ ⑦HELP
A Dashboard	Users	Account	Plan and Billing	Disbursement Account	Document Types	Document Templates	Integrations		
🚓 Clients	ENABL	E ADDITIONAL CONTACT FIE	ELD RESET M	APPING UPDATE F	ILEVINE ACCESS TOKEN	TEST FILEVINE LINK	REMOVE FILEVIN	E ACCESS TOKEN	ADD CONTACT TYPE
Record Requests	FILEVINE INTEGRAT	ION							
Contacts	Personal Access Token	c	A0AEB6	2FAD					
Reports	Organization:		Arctrieval,	ID: 18					
Forms	Last Updated On:		04/17/20	25					
Settings	Is Filevine Contact Add	itional Fields Used:	No						
	Sections and Fields	Contact Types							
_	Filevine Section Selector	Filevine Field Select	or	Arctrieval Ser	tion Arctrieval Fie	eld Name			
	Intake	arctrievalClientLa	ist4SSN	Client	Last 4 of S	SN			EDIT
	arctrievalClient	arctrievalClientAli	lases	Client	Aliases				EDIT
	arctrievalClient	arctrievalLanguaç	gePreference	Client	Language F	Preference			EDIT
	arctrievalClient	arctrievalPatientF	PhotoID	Client	Patient's Pl	hoto ID			EDIT
	arctrievalClient	arctrievalIntakeFo	orm	Client	Arctrieval In	ntake Form			EDIT

Once the error in the field mapping is fixed, reload the page, and the fields will appear in black. The red highlighting only occurs when a field has an error.

12.5. Field Mapping Verified

If all the field mappings are verified, the values in the mapping table will all be displayed in black. Any

errors are highlighted in red.

Verify Field Mapping	×
Select the Filevine Project Type to verify the field mapping:	
Filevine Project Type:*	
Arctrieval Demo-Limited Sections	▼
The mapping is set up correctly, you can start using the integration with the current settings.	
	CLOSE

13. Arctrieval Role-Based Permissions for Filevine

When the Filevine Integration is active in Arctrieval, additional role-based permissions are available to determine whether or not an Arctrieval User may Unlink a Filevine Request, Filevine Client or Filevine Contact from the respective Request, Client or Contact record in Arctrieval.

The Arctrieval User Administrator sets the permissions through the User Account Information, as shown in the image.

PT			
James			
Last Name: * Lindey			
Title: Paralegal			
Email Address: * jlindey@m-c-unlimited.com			
Username: * jlindey			
User Level: * User			_
Alternate Address User Settings	Signatur	e	
Allowed To Update Own Profile?		Allowed To Merge Contacts And Cequests?	
Allowed to change Password?	7	Allowed To Disable Contact Follow-Up?	
Allowed To Delete Information?		Allowed To Unlink Filevine Client?	
Allowed To Add Contacts?		Allowed To Unlink Filevine Contact?	
Allowed To Merge Clients And Clients?		Allowed To Complete Other User's	
	Enabled	•	
Request Status Notifications:			



The permissions to Unlink Filevine Request, Unlink Filevine Client and Unlink Filevine Contact are enabled by default.

14. Configuration Notes

14.1. Project Contact Data Mapping to Arctrieval

The data mapping between Filevine and Arctrieval assumes that the Project Contact is the injured individual and is mapped to the Client section in Arctrieval. The Project Contact can be an adult who is the firm's direct client or a minor child whose parents have engaged the firm to assist with the minor child's claim or case.

If the injured individual is not the Project Contact, you must configure the integration differently. For example, the Project Contact is the parent of a minor injured child. In this situation, the Project Contact is the minor child's personal representative when requesting protected health information. Please contact Arctrieval support if this is the case for you.

14.2. Company Field--Single Filevine Instance connected to multiple Arctrieval accounts

If a Filevine tries to send a request to an Arctrieval account that does not exist, the following happens in Filevine:

- 1. Arctrieval ID is set to Error
- 2. Request Status is set to No Arctrieval Account Exists