

Law Firm Case Management

1. Initial Setup (One-Time Configuration)

Setup Required
Verify & Configure your environment
✕

The system needs to verify the following information and settings:

Case Clients
Verify Client Information
✕

Verify Client Information

Website	Required
Website	Required
Email	Required
Address	Required
Address	Required

Case Details
Verify Case Information
✕

Verify Case Information

Location	Required
Language	Required
Gender	Required
Relationship	Required
Health	Required
Communication	Required
Interactions	Required
Medical	Required
Notes	Required

Case Tracking Status
Verify Case Status
✕

Verify Case Status

Title	Required
Description	Required
Accountable	Required
Location	Required

Case Tools
Verify Case Tools
✕

Verify Case Tools

Website	Required
Description	Required
Website	Required
Notes	Required
Location	Required

Case Payments
Verify Case Payments
✕

Verify Case Payments

Case Title	Required
Client Name	Required
Total Fee	Required
Paid Amount	Required
Pending Amount	Required
Payment Status	Required
Last Payment Date	Required
Notes	Required

Payment/Insurance
Verify Payment/Insurance
✕

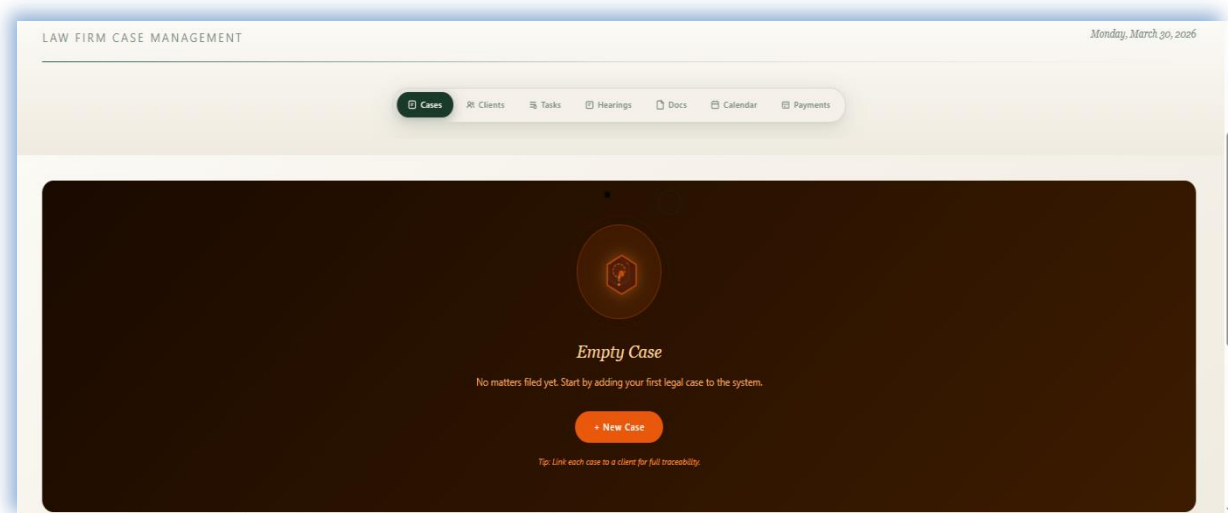
Verify Payment/Insurance

Case Payment	Required
Case	Required
Client	Required
Payment Date	Required
Amount	Required
Remarks	Required

Close
Next Step

- The system will automatically check for required SharePoint lists.
- If lists are missing, a setup wizard will guide you through creating them.
- You just need to click on the Verify & Fix button.

1. Case Management:



- This is an Empty Case UI (When User does not have any case).
- After clicking on the Add Case button you will see the next page output.

Adding a New Case:

New matter

FILL IN THE CASE DETAILS BELOW

Basic Information

CASE TITLE
e.g. Henderson v. Apex Corp

CLIENT
Select client

TYPE OF CASE
Civil

DATE FILED
03/30/2026

PARTIES
e.g. Henderson LLC vs. Apex Corp

Court Information

DOCKET NUMBER
e.g. CM-041

ASSIGNED BRANCH
e.g. High Court — Civil

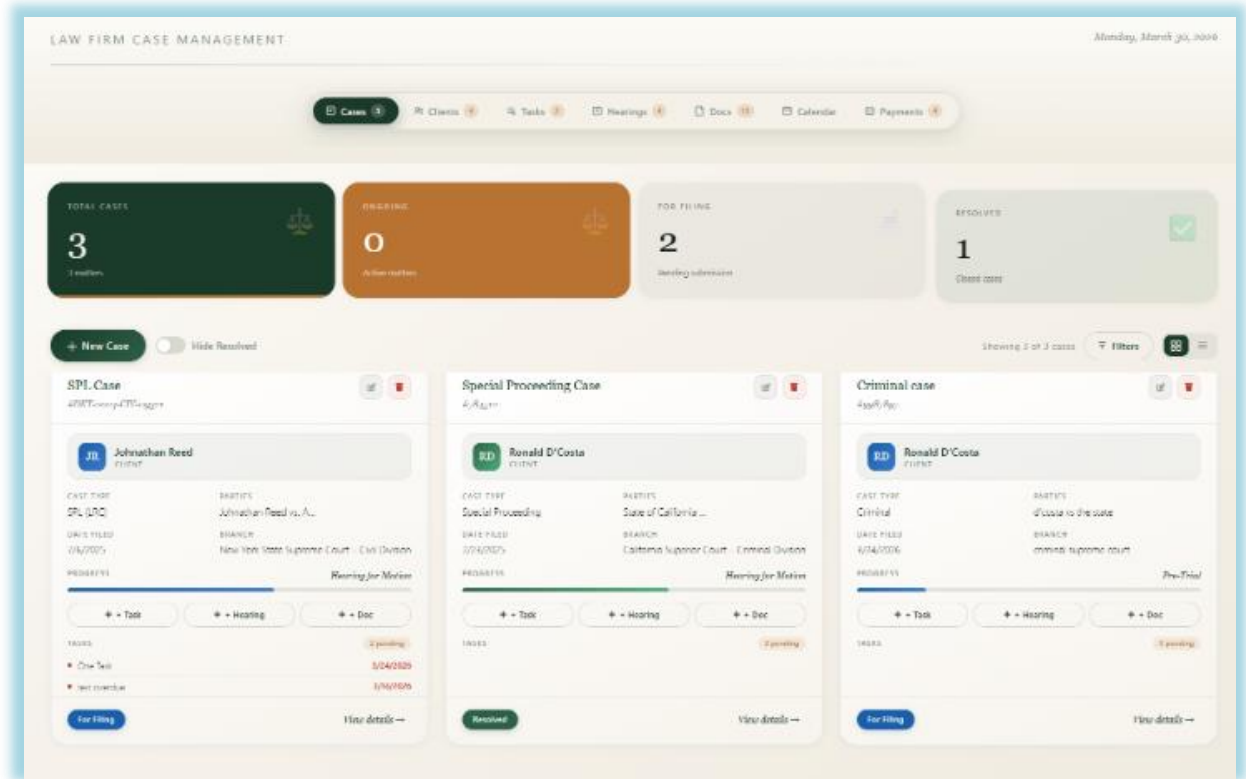
Status & Progress

CURRENT STATUS
For Filing Ongoing Resolved

CASE PROGRESS
Pre-Trial Presentation of Witness Hearing for Motion
Trial Proper Decision Pending

Cancel Submit matter

- When User click on Add Case button this form will open, and the user have to fill out all the required details of form and after clicking on submit button user can see following output.



- The **Case Management System** is a sophisticated legal workflow management platform designed to enhance efficiency, organization, and compliance for law firms, corporate legal teams, and judicial administrators. Below is a structured breakdown tailored for client

presentations or stakeholder reviews.

- The system centralizes case tracking, document management, hearing schedules, and task delegation into a single, intuitive interface—reducing administrative overhead and minimizing human error.
- To Edit the case user needs to click on the Edit icon button available in the case card which will open the form in edit modal, modify the details and click on update button to save the details.
- To delete the case, user needs to click on the Delete icon button available in the case card which will open a confirmation pop up, click on delete to delete the case card.
- User can click on the case card that action will open the case details modal which contains all case information.

2. Clients:

New client

ADD A CLIENT TO THE DIRECTORY

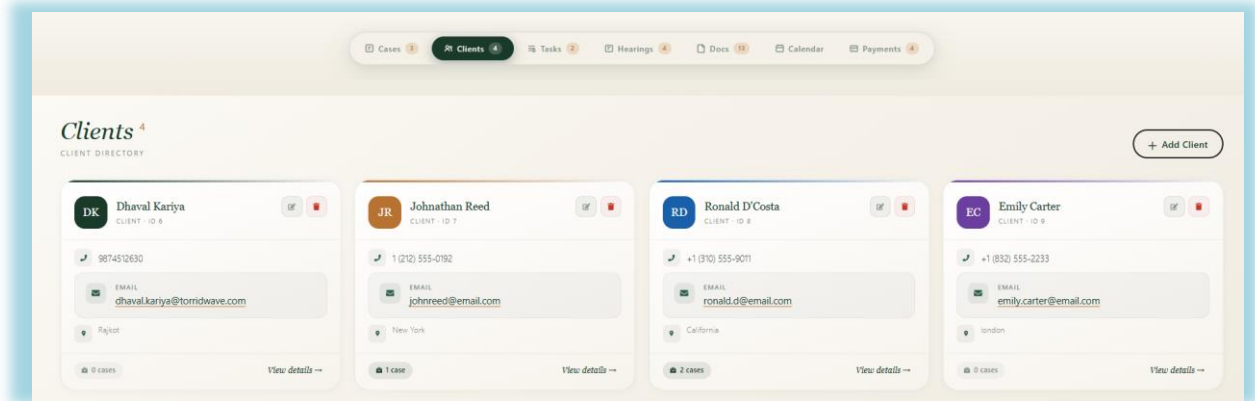
FIRST NAME

LAST NAME

EMAIL

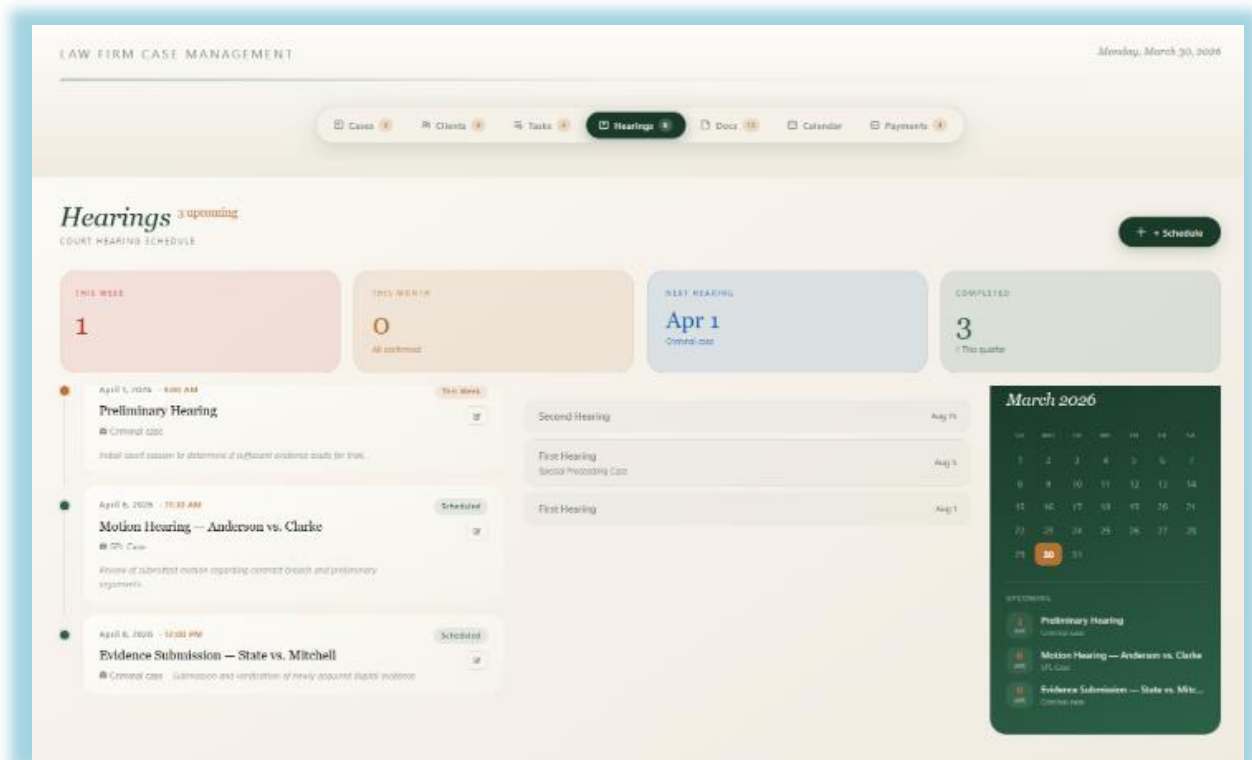
CONTACT NUMBER

ADDRESS



- The Clients UI describes information of clients related to the case, User can view All Client's Details in this view.
- To Edit the Client, user needs to click on the Edit icon button available in the Screen which will open the form in edit modal, modify the details and click on update button to save the details.
- To delete the Client, user needs to click on the Delete icon button available in the Screen which will open a confirmation pop up, click on delete to delete the Client.
- The Clients can directly be viewed in the Clients Dropdown available in the Add Case Form.

3. Hearing Dates:



- This Image describes the Hearing Dates of the particular case which can be added by user.
- To Edit the Hearing Dates, user needs to click on the Edit icon button available in the card which will open the form in edit modal, modify the details and click on update button to save the details.
- To delete the Hearing Dates, user needs to click on the Delete icon button available in the case card which will open a confirmation pop up, click on delete to delete the Hearing Date.

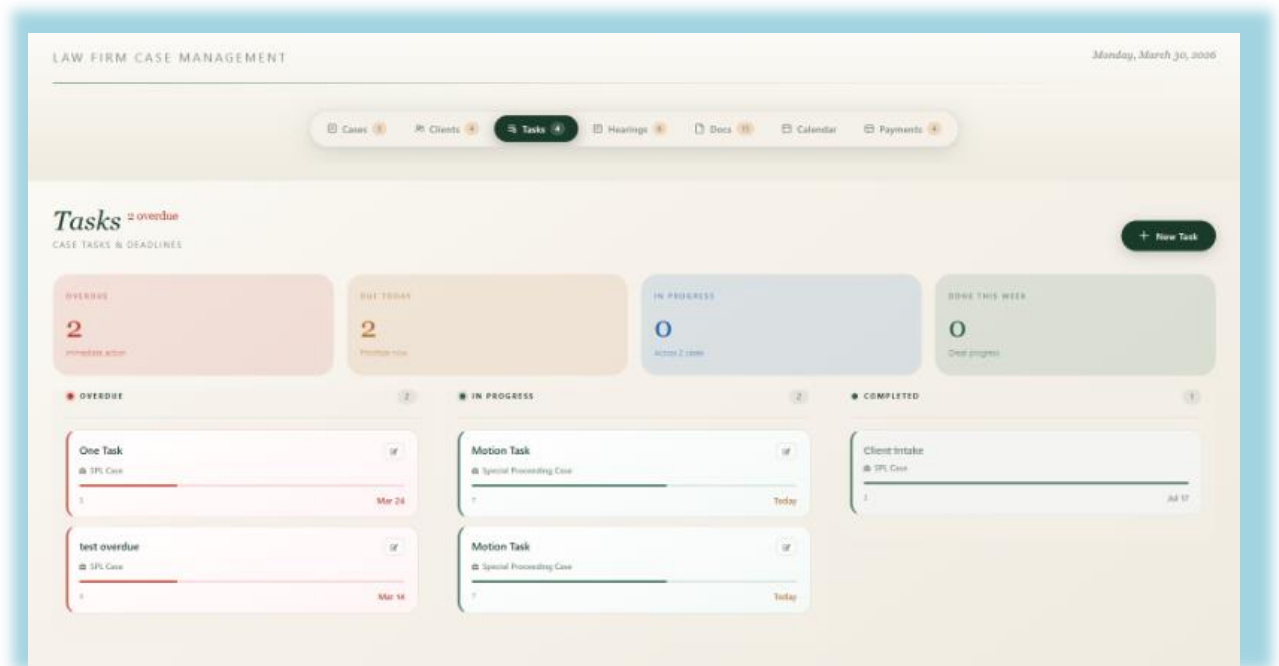
3. Documents:

The screenshot displays a 'Documents' interface for law firm case management. At the top, there is a navigation bar with 'LAW FIRM CASE MANAGEMENT' on the left and a user profile 'Viewing: Michael J. Jones' on the right. Below the navigation bar is a search bar with filters for 'Cases', 'All Files', 'Tasks', 'Meetings', 'Notes', 'Calendar', and 'Reports'. The main content area is titled 'Documents' and includes a 'New' button and a 'Upload' button. There are three summary cards: 'TOTAL FILES' (12), 'RECENTLY VIEWED' (0), and 'PENDING REVIEW' (2). The main grid contains 13 document cards, each with a title, date, status, and a 'Download' button. The sidebar on the right shows '13 files' and a list of document titles with their dates. At the bottom of the sidebar is an 'Upload document' button.

Document Title	Date	Status	Action
Loan Recovery Notice	10/11/2022	Not Viewed	Download
Software License Dispute Form	10/10/2022	Not Viewed	Download
Intellectual Property Claim Notice	10/10/2022	Not Viewed	Download
Charge Sheet	10/10/2022	Special Proceeding	Download
Bill Application	10/10/2022	Special Proceeding	Download
Court Order	10/10/2022	Special Proceeding	Download
Special Proceeding Case	10/10/2022	Not Viewed	Download
Writ Statement	10/10/2022	Not Viewed	Download
Apply to Plead	10/10/2022	Not Viewed	Download
Writish	10/10/2022	Not Viewed	Download
Civil Case	10/10/2022	Not Viewed	Download
Writ Case	10/10/2022	Not Viewed	Download
Case 1	10/10/2022	Not Viewed	Download

- This describes information of Documents which are submitted for the particular Case.
- User can click on the View button to Download the particular Document.
- To delete the Document, user needs to click on the Delete icon button available in the card which will open a confirmation pop up, click on delete to delete the Document.

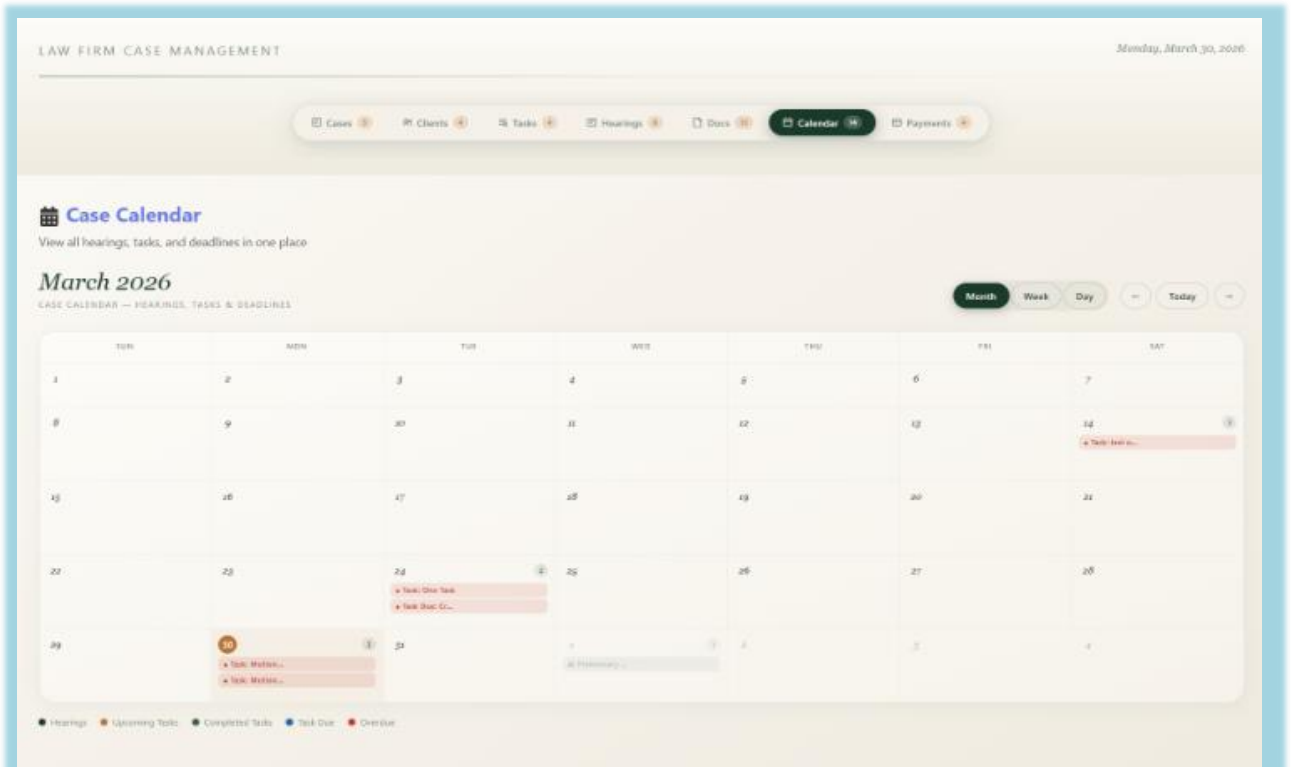
4. Tasks:



- After clicking on the name of the Task (Available in the case card main screen), User can View the Tasks related to Case.
- To Edit the Task, user needs to click on the Edit icon button available in the Task card which will open the form in edit modal, modify the details and click on update button to save the details.

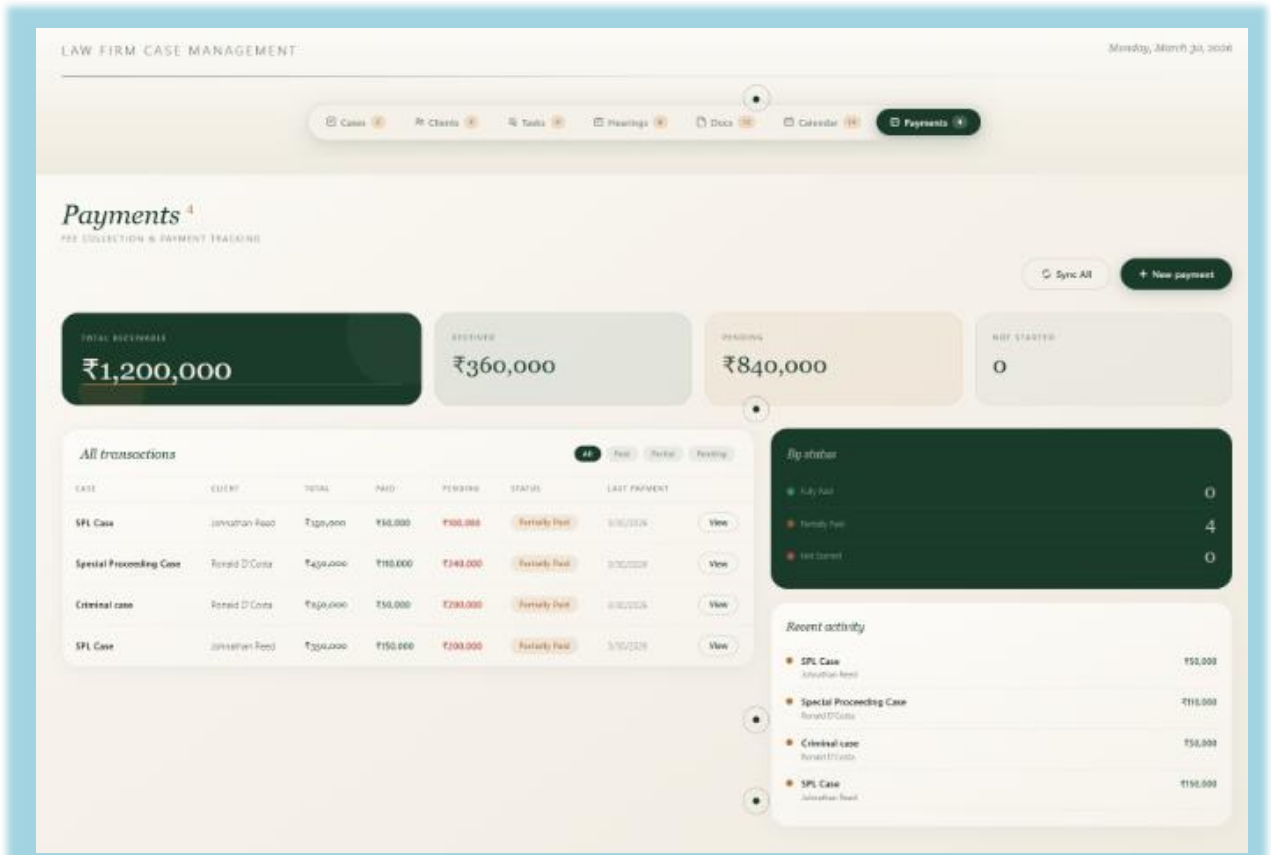
- To Delete the Task, user needs to click on the Delete icon button available in the Task card which will open the confirmation pop up, after clicking on the delete user can delete the Task.

5. Case Calendar:



- All hearing dates, deadlines, and case-related events are organized in a single calendar view, making it easy for users to manage and track case activities efficiently.
- Users can quickly identify **upcoming hearings, overdue tasks, and completed events**, helping them stay updated and avoid missing critical legal deadlines.
- The calendar enables better planning by providing a clear timeline of case activities, allowing legal professionals to prioritize tasks and manage workload effectively.

6. Case Payments:



- The system provides a detailed audit of payments made by each client, including the total amount received, pending balances, and a complete transaction history for better financial visibility.
- Users can easily monitor individual client payment status, including **outstanding dues and last payment date**, enabling quick follow-ups and improved client management.
- The dashboard displays **total revenue received and overall pending amounts** across all clients, helping legal professionals analyze cash flow and make informed financial decisions.