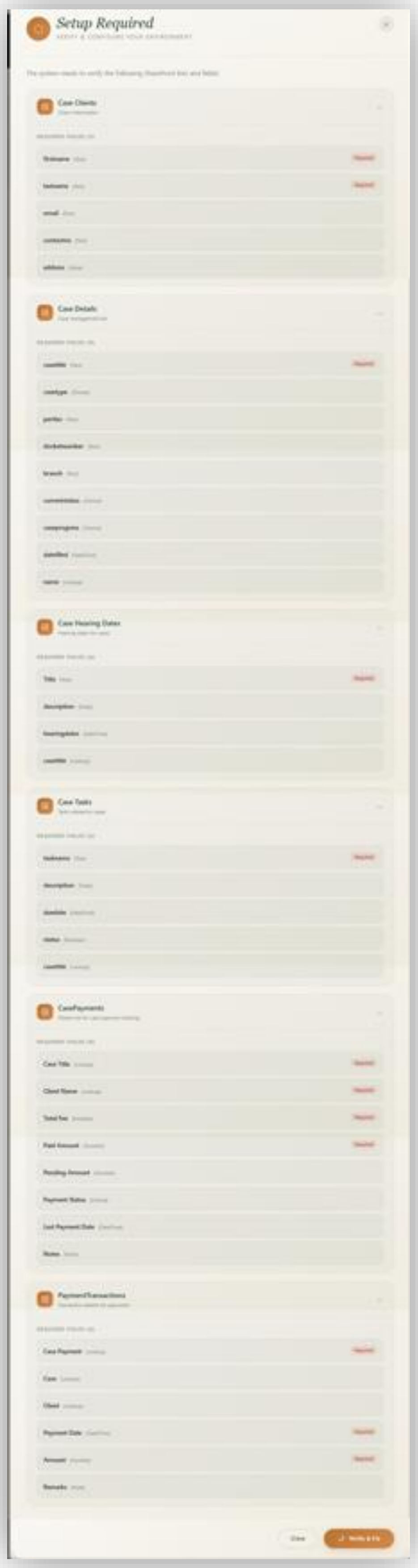
Law Firm Case Management

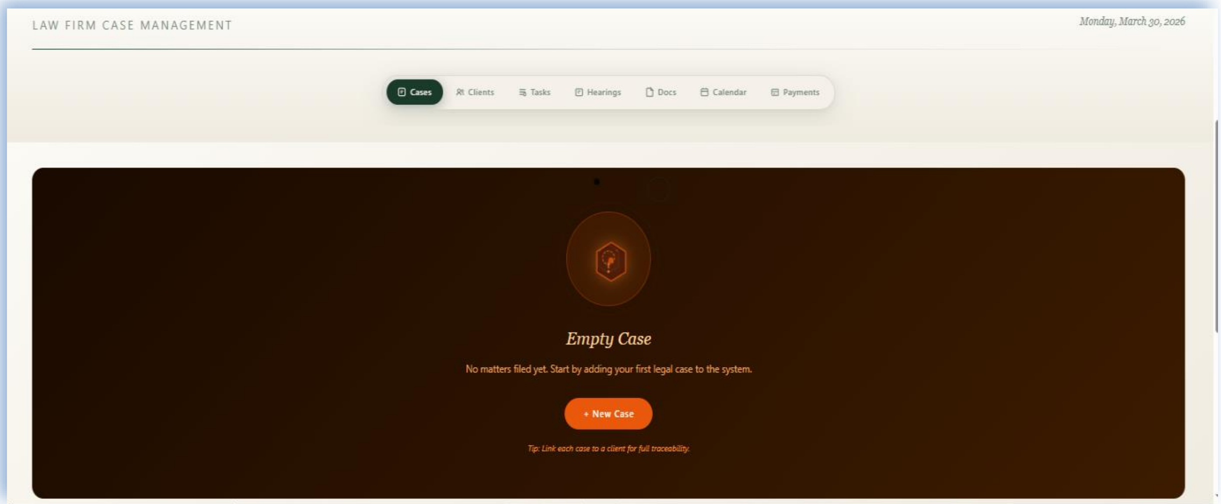
1. Initial Setup (One-Time Configuration)



Setup Required
Case Clients
email
Case Details
Case Hearing Dates
Title
description
Case Tasks
description
CasePayments
Case Title
Client Name
Total Fee
Paid Amount
Pending Amount
Payment Status
Last Payment Date
Notes
PaymentTransactions
Case Payment
Case
Client
Payment Date
Amount
Remarks

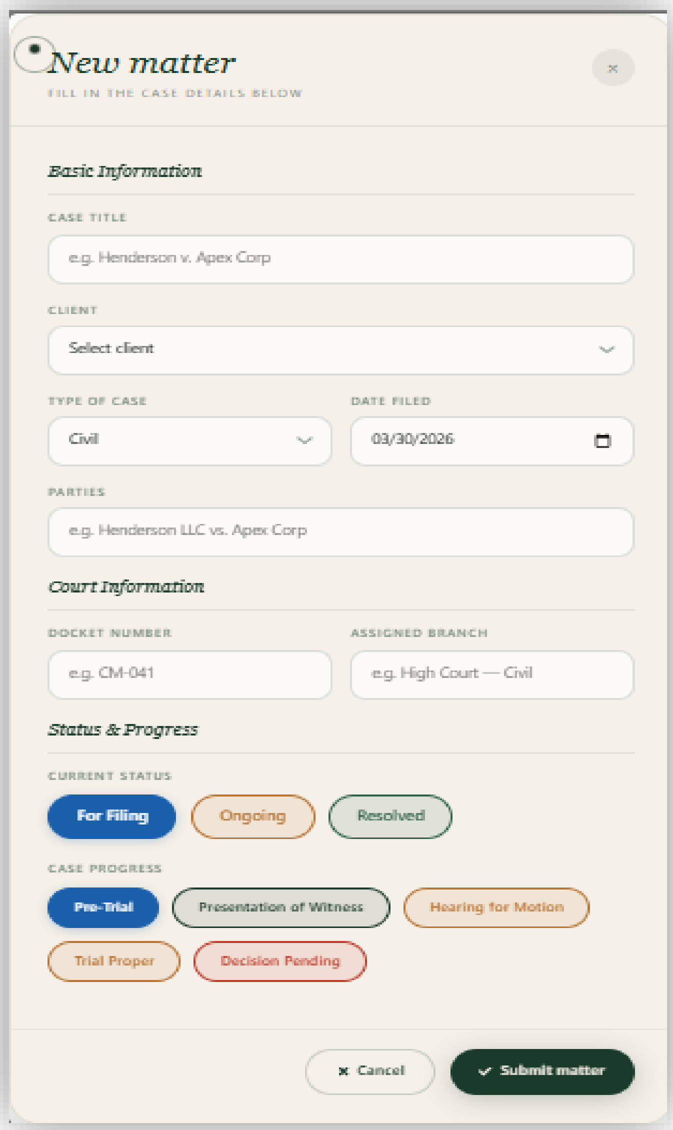
- The system will automatically check for required SharePoint lists.
- If lists are missing, a setup wizard will guide you through creating them.
- You just need to click on the Verify & Fix button.

1. Case Management:

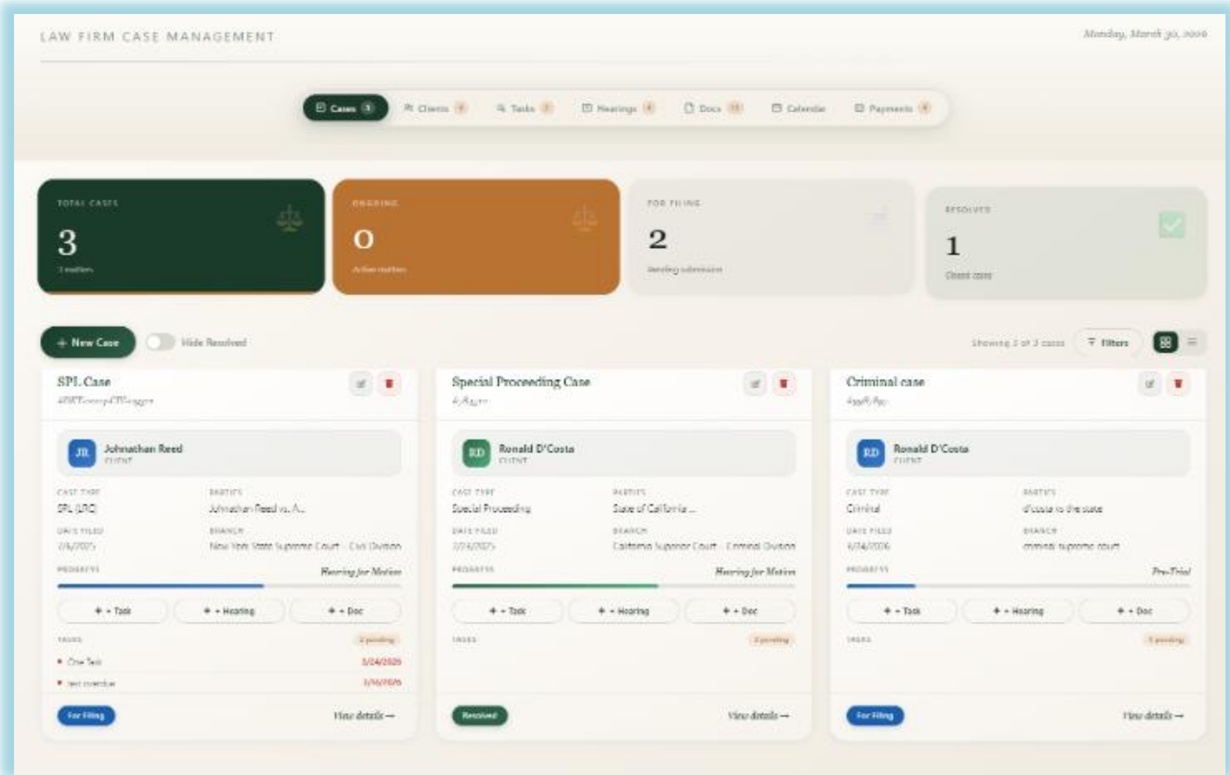


- This is an Empty Case UI (When User does not have any case).
- After clicking on the Add Case button you will see the next page output.

Adding a New Case:



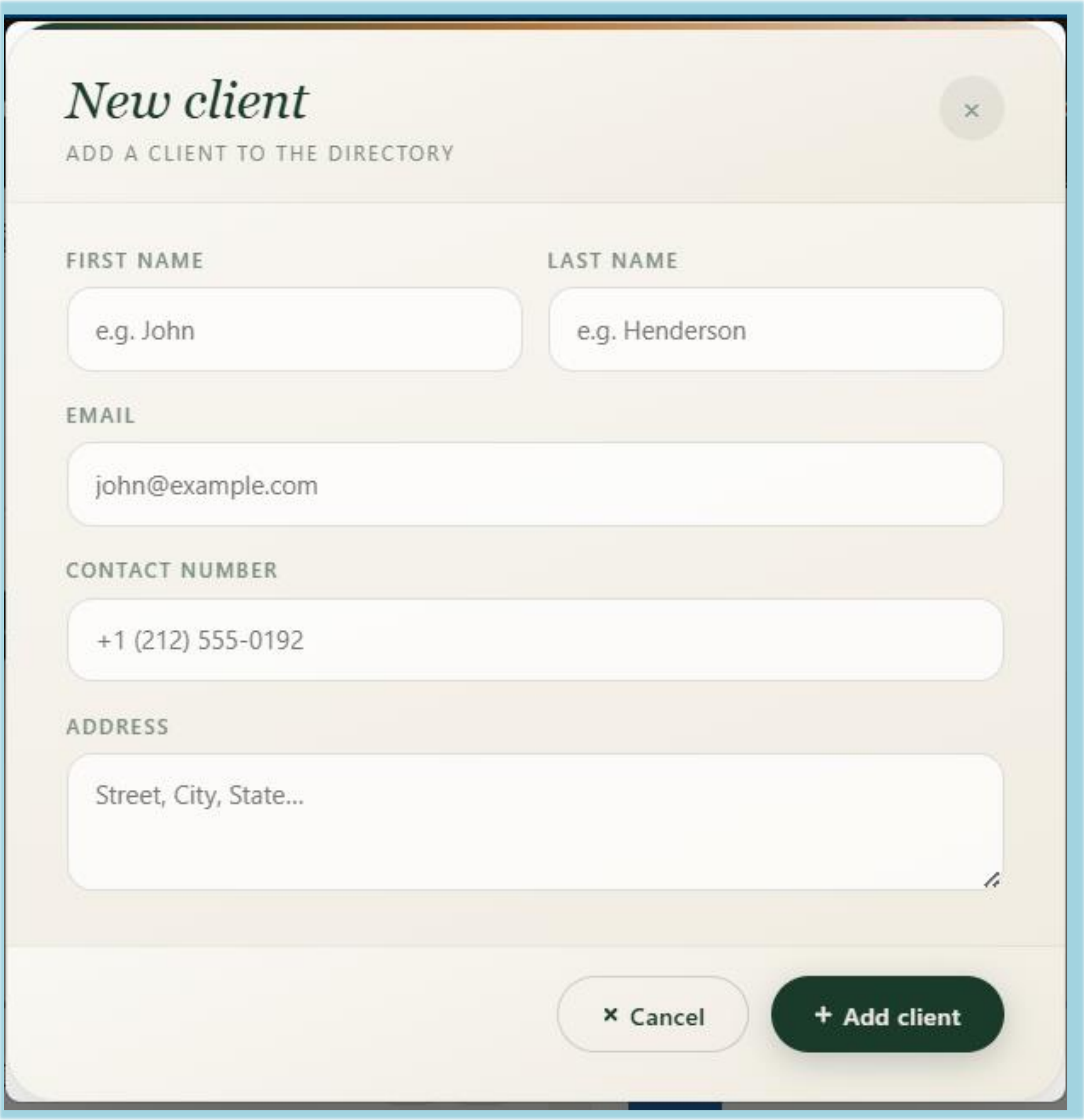
- When User click on Add Case button this form will open, and the user have to fill out all the required details of form and after clicking on submit button user can see following output.

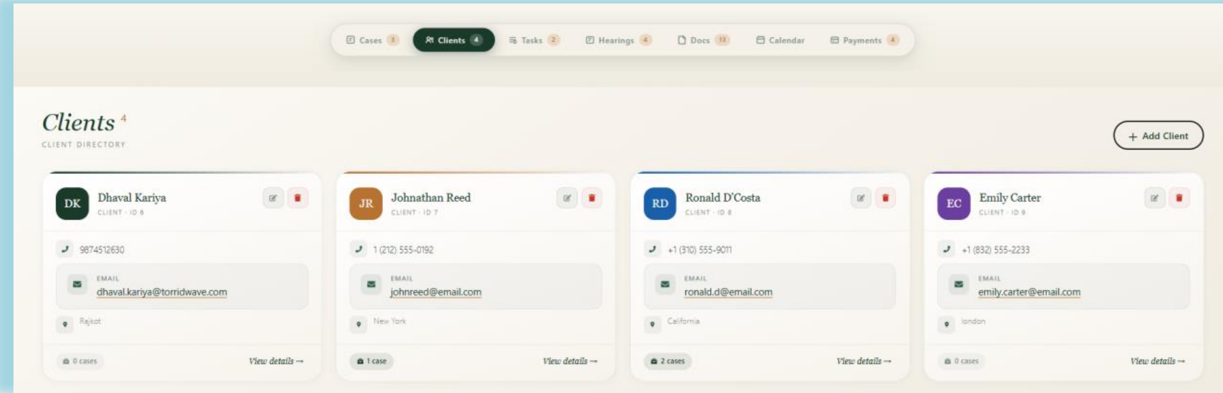


- The **Case Management System** is a sophisticated legal workflow management platform designed to enhance efficiency, organization, and compliance for law firms, corporate legal teams, and judicial administrators. Below is a structured breakdown tailored for client presentations or stakeholder reviews.

- 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 from 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.

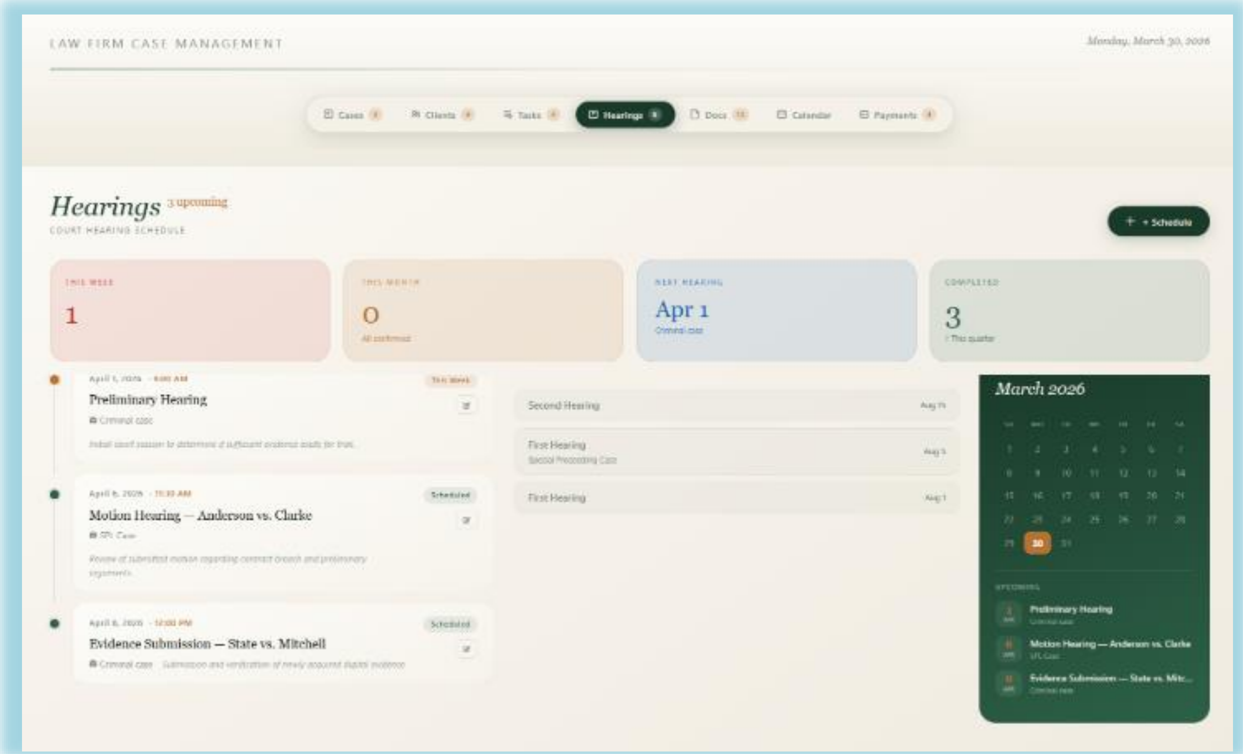
2. Clients:


New client
ADD A CLIENT TO THE DIRECTORY
×
FIRST NAME
e.g. John
LAST NAME
e.g. Henderson
EMAIL
john@example.com
CONTACT NUMBER
+1 (212) 555-0192
ADDRESS
Street, City, State...
× Cancel
+ Add client



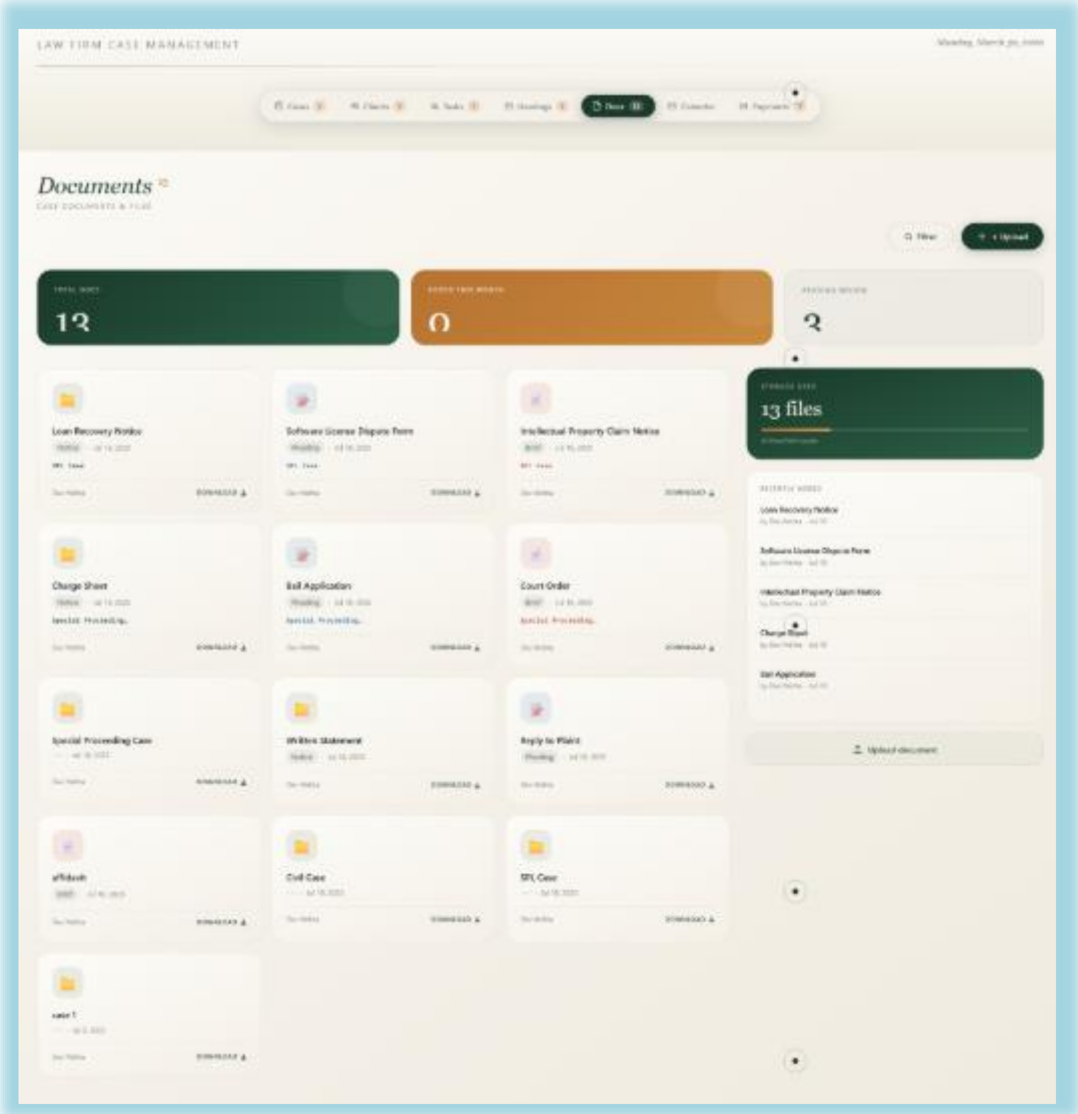
- The Clients UI describes information of clients related to the case, User can view All Client's Details in this view.
- To Edit the Client, user needs to click on the Edit icon button available in the Screen which will open the from in edit modal, modify the details and click on update button to save 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:



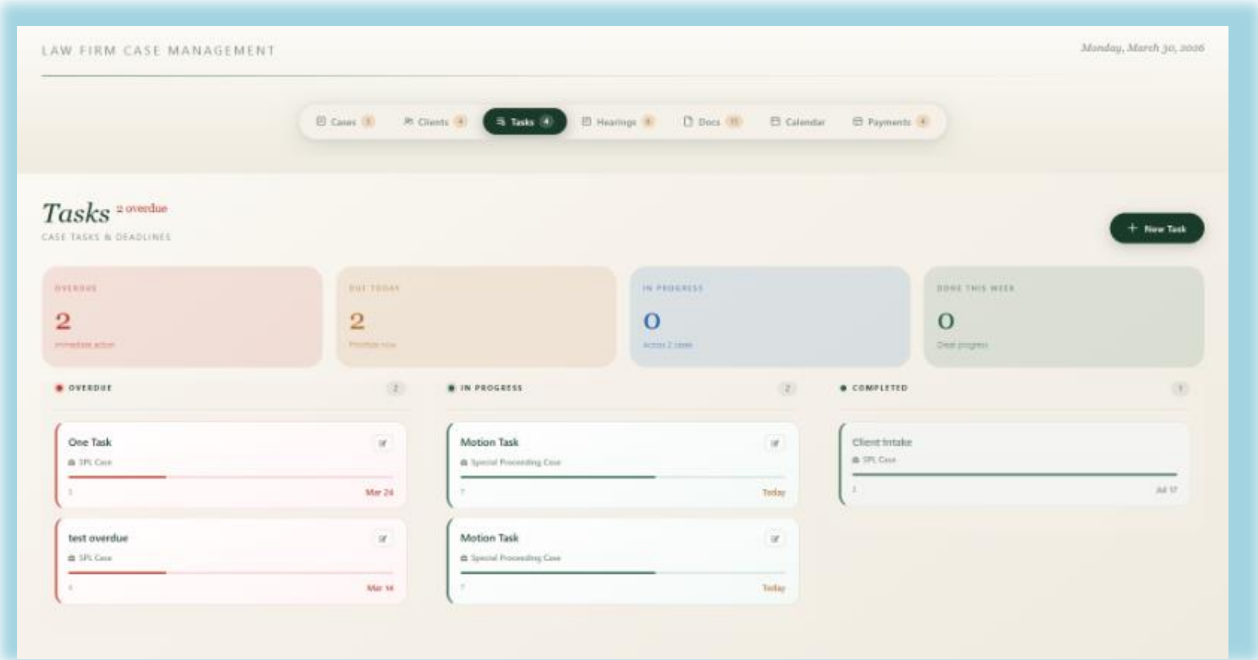
- This Image describes the Hearing Dates of the particular case which can be added by user.
- To Edit the Hearing Dates, user needs to click on the Edit icon button available in the card which will open the from in edit modal, modify the details and click on update button to save the details.
- To delete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



- 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.

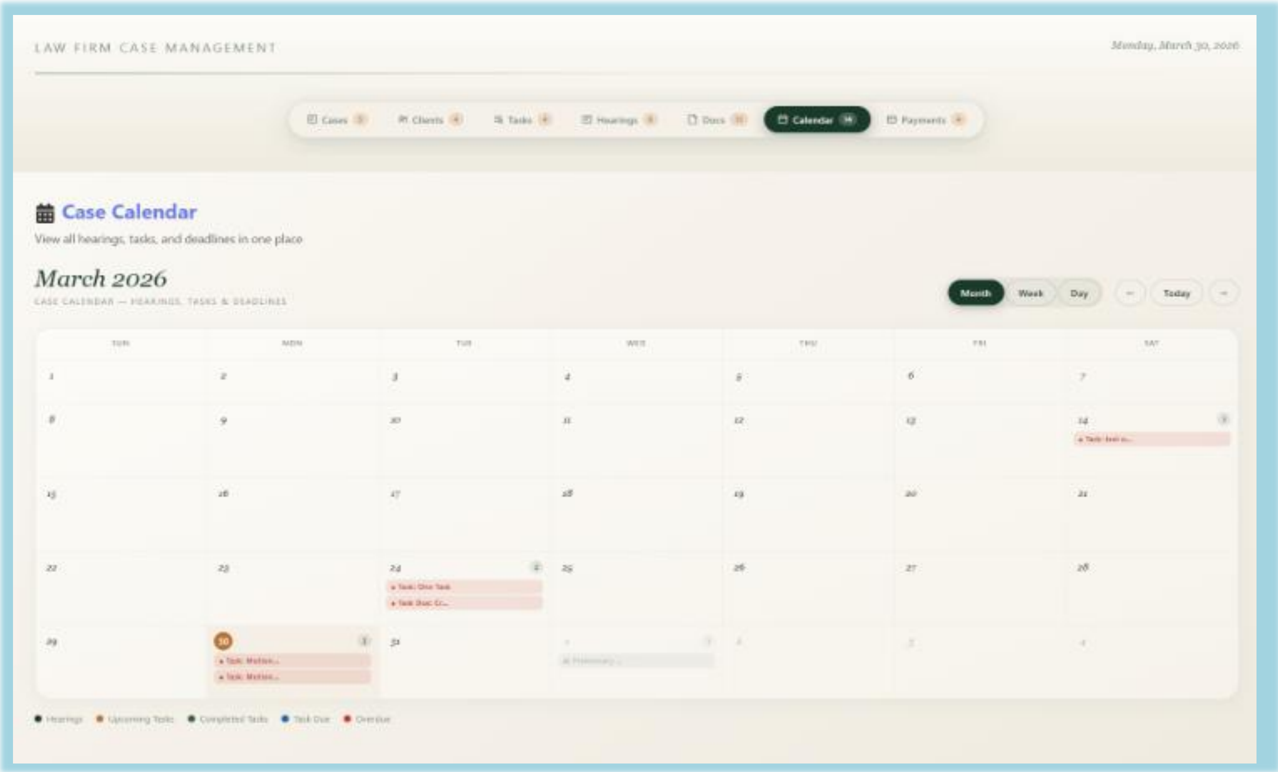
4. Tasks:



- 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 from in edit modal, modify the details and click on update button to save the details.

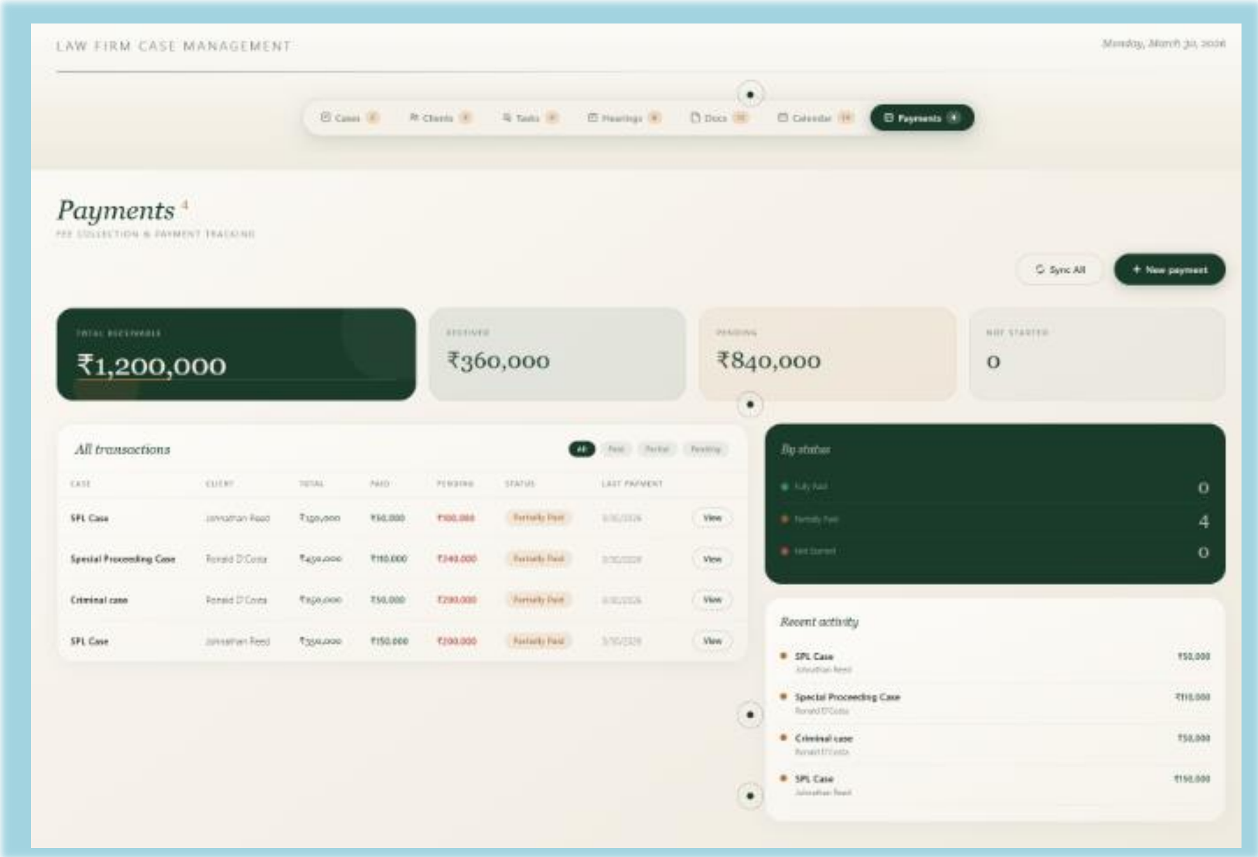
- To Delete the Task, user needs to click on the Delete icon button available in the Task card which will open the confirmation pop up, after clicking on the delete user can delete the Task.

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.