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Mobile Guide

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Welcome to Your Digital Lawyer Diary Guide!

This guide will walk you through the powerful features of the Digital Lawyer Diary, helping you manage your cases, tasks, and practice with efficiency. Let's start with the first screen you see when you log in: the Dashboard.

1. The Dashboard: Your Command Center

Your dashboard is your mission control. It gives you a high-level, at-a-glance overview of your most critical information, from upcoming case dates to your overall case load.

The screenshot displays the 'Digital Lawyer Diary' dashboard. At the top, there's a header with the logo and a 'Welcome back! Here's your comprehensive case and task overview' message. A sidebar on the left contains navigation icons for Home, Cases, Invoice, Projects, Contacts, Associates, Law Books, Links, and Settings. The main content area features several widgets: 'Today' (4 cases), 'Tomorrow' (0 cases), 'Status' (80 Active, 8 Pending), 'Cases' (4 This Week, 68 This Month), 'Archive' (162 Archived, 0 Assigned), 'Summary' (100 Decided, 246 Total), and 'Recent Cases' (listing three cases with details like Judge, Court, and Stage). A 'Your Tasks' section at the bottom shows 1 task with a search bar and filters for Status and Assignee.

By default, your dashboard includes several informative **widgets**:

- **Today & Tomorrow:** Shows the number of cases scheduled for today and the next day.
- **Status:** A summary of your active and pending cases.
- **Cases:** A count of new cases added this week and this month.
- **Archive & Summary:** An overview of archived, decided, and total cases.
- **Recent Cases:** A list of your most recently updated cases for quick access.
- **Your Tasks:** A list of pending tasks and their deadlines.

The true power of the dashboard is its flexibility. You can completely personalize it to fit your workflow.

2. Personalizing Your Workspace: Customizing the Dashboard

Think of your dashboard as a set of building blocks (widgets). You can move, resize, add, or remove them to prioritize what's most important to you.

Step 1: Enter Customization Mode

To begin personalizing your layout, click the **gear icon** (⚙️) located at the top right of the dashboard.

Digital Lawyer Diary

Home

Cases

Invoice

Projects

Contacts

Associates

Law Books

Links

Settings

Dashboard

Welcome back! Here's your comprehensive case and task overview

Today

4

Tomorrow

0

Status

80 Active

8 Pending

Archive

162 Archived

0 Assigned

Cases

4 This Week

68 This Month

Summary

100 Decided

246 Total

Recent Cases

View All

United Foam Industries v/s M/s EFU, etc

15/05/2025

Judge: Ali Akbar Qureshi + Zafar Iqbal Tara, Insurance Tribunal, Lahore

Court: Lahore CourtInsurance Tribunal Lahore

Stage: Arguments

Mst Noor Begum v/s Umara, ETC

27/05/2025

Judge: Full bench BOR

Court: Lahore CourtBoard of revenue

Stage: Written Arguments

National Bank of Pakistan v/s M/s United Foam Industries, Etc

31/07/2025

Judge: Misbah Khan, JBC-V, Lahore

Court: Lahore CourtBanking court -V- Lahore

Stage: Jawab Ul jawab

Your Tasks

1 task

Search tasks...

Sort

Status

Assignee

You'll know you're in customization mode when a blue banner appears and your widgets have a dashed border.

Digital Lawyer Diary

Home

Cases

Invoice

Projects

Contacts

Associates

Law Books

Links

Settings

Dashboard

Customization Mode

Drag and resize widgets to customize your layout

Add Widget

Done Customizing

Customization Mode Active - Drag widgets to rearrange, resize by dragging corners, use "Add Widget" to add new ones

Reset to Default

Today

4

Tomorrow

0

Status

80 Active

8 Pending

Archive

162 Archived

0 Assigned

Cases

4 This Week

68 This Month

Summary

100 Decided

246 Total

Recent Cases

View All

United Foam Industries v/s M/s EFU, etc

15/05/2025

Judge: Ali Akbar Qureshi + Zafar Iqbal Tara, Insurance Tribunal, Lahore

Court: Lahore CourtInsurance Tribunal Lahore

Stage: Arguments

Mst Noor Begum v/s Umara, ETC

27/05/2025

Judge: Full bench BOR

Court: Lahore CourtBoard of revenue

Stage: Written Arguments

National Bank of Pakistan v/s M/s United Foam Industries, Etc

31/07/2025

Judge: Misbah Khan, JBC-V, Lahore

Court: Lahore CourtBanking court -V- Lahore

Your Tasks

1 task

Search tasks...

Sort

Status

Assignee

Step 2: Rearrange and Resize Widgets

Once in customization mode, you can organize your workspace.

- **To Move a Widget:** Click and hold the widget, drag it to your desired location, and release.
- **To Resize a Widget:** Hover over the bottom-right corner of a widget until your cursor changes, then click and drag to make it larger or smaller.

Digital Lawyer Diary

Home

Cases

Invoice

Projects

Contacts

Associates

Law Books

Links

Settings

Dashboard

Customization Mode

+ Add Widget

Done Customizing

Drag and resize widgets to customize your layout

Customization Mode Active - Drag widgets to rearrange, resize by dragging corners, use "Add Widget" to add new ones

Reset to Default

Today

4

Tomorrow

0

Status

80 Active

8 Pending

Archive

162 Archived

0 Assigned

Cases

4 This Week

68 This Month

Summary

100 Decided

246 Total

Your Tasks

1 task

Recent Cases

View All

United Foam Industries v/s M/s EFU,etc

Judge: Ali Akbar Qureshi + Zafar Iqbal Tara, Insurance Tribunal, Lahore

Court: Lahore CourtInsurance Tribunal Lahore

Stage: Arguments

Mst Noor Begum v/s Umara, ETC

Judge: Full bench BOR

Court: Lahore CourtBoard of revenue

Stage: Written Arguments

National Bank of Pakistan v/s M/s United Foam Industries, Etc

Judge: Misbah Khan, JBC-V, Lahore

Court: Lahore CourtBanking court -V- Lahore

Step 3: Add and Remove Widgets

Tailor the dashboard to show only the information you need.

- To Remove a Widget:** Click the red 'X' icon that appears at the top-right corner of any widget.

Digital Lawyer Diary

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Cases

Invoice

Projects

Contacts

Associates

Law Books

Links

Settings

Dashboard

Customization Mode

+ Add Widget

Done Customizing

Drag and resize widgets to customize your layout

Customization Mode Active - Drag widgets to rearrange, resize by dragging corners, use "Add Widget" to add new ones

Reset to Default

Today

4

Tomorrow

0

Status

80 Active

8 Pending

Archive

162 Archived

0 Assigned

Cases

4 This Week

68 This Month

Summary

100 Decided

246 Total

Your Tasks

1 task

Search tasks...

Sort

Status

Assignee

Recent Cases

View All

United Foam Industries v/s M/s EFU,etc

Judge: Ali Akbar Qureshi + Zafar Iqbal Tara, Insurance Tribunal, Lahore

Court: Lahore CourtInsurance Tribunal Lahore

Stage: Arguments

Mst Noor Begum v/s Umara, ETC

Judge: Full bench BOR

Court: Lahore CourtBoard of revenue

Stage: Written Arguments

National Bank of Pakistan v/s M/s United Foam Industries, Etc

Judge: Misbah Khan, JBC-V, Lahore

Court: Lahore CourtBanking court -V- Lahore

- To Add a Widget:** Click the blue "+ Add Widget" button at the top of the screen. A dropdown menu will appear with a list of available widgets you can add back to your dashboard. Simply click on one to add it.

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Digital Lawyer Diary

Home
 Cases
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 Links
 Settings

Dashboard

Customization Mode

Drag and resize widgets to customize your layout

Customization Mode Active - Drag widgets to rearrange, resize by dragging corners, use "Add Widget" to add new ones

Today: 4

Tomorrow: 0

Status: 80 Active, 8 Pending

Archive: 162 Archived, 0 Assigned

Cases: 4 This Week, 68 This Month

Summary: 100 Decided, 246 Total

Recent Cases

United Foam Industries v/s M/s EFU, etc

Judge: Ali Akbar Qureshi + Zafar Iqbal Tara, Insurance Tribunal, Lahore

Court: Lahore CourtInsurance Tribunal Lahore

Stage: Arguments

Mst Noor Begum v/s Umara, ETC

Judge: Full bench BOR

Court: Lahore CourtBoard of revenue

Stage: Written Arguments

National Bank of Pakistan v/s M/s United Foam Industries, Etc

Judge: Misbah Khan, JBC-V, Lahore

Court: Lahore CourtBanking court -V- Lahore

Your Tasks

1 task

Search tasks...

Status Assignee

+ Add Widget

Done Customizing

Step 4: Save or Reset Your Layout

- Save:** Once you are happy with your new layout, click the green **"Done Customizing"** button. Your personalized view is now saved!
- Reset:** If you want to return to the original layout at any time, enter Customization Mode and click the **"Reset to Default"** link.

3. Quick Navigation: Accessing Case Details

Your dashboard widgets are not just for display; they are interactive. Clicking on a case title within the **"Recent Cases"** widget or any other case list will take you directly to the detailed **Case View** page for that specific case.

Digital Lawyer Diary

Home
 Cases
 Invoice
 Projects
 Contacts
 Associates
 Law Books
 Links
 Settings

Dashboard

Welcome back! Here's your comprehensive case and task overview

Today: 5

Tomorrow: 0

Status: 81 Active, 9 Pending

Archive: 162 Archived, 0 Assigned

Cases: 5 This Week, 69 This Month

Summary: 100 Decided, 247 Total

Recent Cases

United Foam Industries v/s M/s EFU, etc

Judge: Ali Akbar Qureshi + Zafar Iqbal Tara, Insurance Tribunal, Lahore

Court: Lahore CourtInsurance Tribunal Lahore

Stage: Arguments

Mst Noor Begum v/s Umara, ETC

Judge: Full bench BOR

Court: Lahore CourtBoard of revenue

Stage: Written Arguments

National Bank of Pakistan v/s M/s United Foam Industries, Etc

Judge: Misbah Khan, JBC-V, Lahore

Court: Lahore CourtBanking court -V- Lahore

Stage: Jawab UI jawab

Your Tasks

1 task

Search tasks...

Status Assignee

+ New Case

Projects

Settings

This allows you to quickly jump from a high-level overview to in-depth case information without navigating through multiple menus.

4. Case Management: The Heart of Your Practice

The **Cases** module is your central repository for all case-related information, from court dates and case numbers to client details and attached documents.

To get started, click on **Cases** in the main navigation menu on the left.

4.1 The Cases List View

This is your main dashboard for all cases. It provides a comprehensive, sortable table of your entire caseload.

Home

Cases

Invoice

Projects

Contacts

Associates

Law Books

Links

Settings

Digital Lawyer Diary

Calender View

Search Cases

Filter by

Sort By

Print

Customize

Create Case

Custom Fields

Sr #	Court Case #	Case Type	Case Stage	Case Title	Court Name	Next Date
1		Suit For Recovery	Arguments	United Foam Industries v/s M/s EFU,etc	Insurance Tribunal Lahore	15/05/25
2			Written Arguments	Mst Noor Begum v/s Umara, ETC	Board of revenue	27/05/25
3		Banking law	Jawab Ul jawab	National Bank of Pakistan v/s M/s United Foam Industries, Etc	Banking court -V- Lahore	31/07/25
4	195113	Suit for Declaration	Notices	Habib Ullah Asim Vs Mumtaz Begum etc	Civil Court Model Town, Lahore	02/10/25
5	117515	Recovery Suit	For evidence of plaintiff	Huma Nisar Vs Tariq Shafqat, etc	Civil Court, Lahore	04/10/25
6	269681423	Suit for Declaration & Declaration	انتظار حکم عدالت حکم نگرانی	Huma Nisar Vs Raja Qaiser etc	Civil Court, Lahore	04/10/25
7	123	Administrative Law	Arguments on Application	1234	Abd	04/10/25

Here, you have several powerful tools at your disposal:

- Search Cases:** Use the search bar at the top to instantly find a case by its title, case number, court name, or any other detail.
- Filter & Sort:** Use the **Filter by** and **Sort By** buttons to narrow down and organize your case list precisely.
- Print Cause List:** Click the **Print** button to generate a professional, printable PDF of your current case list. Before printing, you can filter the list (e.g., by date) to create a perfect cause list for a specific day or court.

15-05-25

Sr. No	Court Sr #	Court Case #	Previous Date	Case Type	Case Stage	Case Title	Court Name	Counsel For	Next Date
1			26-03-25	Suit For Recovery	Arguments	United Foam Industries v/ s M/s EFU,etc	Ali Akbar Qureshi + Zafar Iqbal Tara, Insurance Tribunal, Lahore	Plaintiff	

27-05-25

Sr. No	Court Sr #	Court Case #	Previous Date	Case Type	Case Stage	Case Title	Court Name	Counsel For	Next Date
1			25-03-25		Written Arguments	Mst Noor Begum v/s Umara, ETC	Full bench BOR		

31-07-25

Sr. No	Court Sr #	Court Case #	Previous Date	Case Type	Case Stage	Case Title	Court Name	Counsel For	Next Date
1			22-04-25	Banking law	Jawab Ul jawab	National Bank of Pakistan v/s M/s United Foam Industries, Etc	Misbah Khan, JBC-V, Lahore	Respondents Nos, 3 & 4	

02-10-25

Sr. No	Court Sr #	Court Case #	Previous Date	Case Type	Case Stage	Case Title	Court Name	Counsel For	Next Date
--------	------------	--------------	---------------	-----------	------------	------------	------------	-------------	-----------

1		195113	11-09-25	Suit for Declaration	Notices	Habib Ullah Asim Vs Mumtaz Begum etc	Kamran Karamat, Civil Judge, Model Town, Lahore	Plaintiff	
---	--	--------	----------	----------------------	---------	--------------------------------------	---	-----------	--

04-10-25

Sr. No	Court Sr #	Court Case #	Previous Date	Case Type	Case Stage	Case Title	Court Name	Counsel For	Next Date
--------	------------	--------------	---------------	-----------	------------	------------	------------	-------------	-----------

- Customize:** Click the **Customize** button to choose which columns are visible in your table, allowing you to see only the information that matters most.
- Calendar View:** Click the **Calendar View** icon to see your cases plotted on a monthly calendar based on their "Next Date."

Home
Cases
Invoice
Projects
Contacts
Associates
Law Books
Links
Settings

Cases

+ Create Case
Custom Fields

Search Cases

Filter by
Sort By
Print
Customize

Today Back Next

October 2025

Month Week Day Agenda

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	01	02	03	04
						1234
05	06	07	08	09	10	11
				Imdad Ahmad Awan v/s M...	Askari Bank Limited VS M...	Raja Qasir vs Huma Nisar ...
					Salma Afzal Vs Ch. Muha...	+2 more
12	13	14	15	16	17	18
Haji Muhammad Sharif Vs...	Nosheen Rauf VS Tahira Y...	Hassan Bashir v/s Public a...	Farah Deebea Vs Rubina Y...	Mst Sanam yaseen vs Ali ...	Rehan Malik Vs Abdullah ...	
+3 more	+4 more	+2 more	+3 more		+7 more	
19	20	21	22	23	24	25
Muhammad Zubair etc Vs...	Nadeem ahmar vs DHA etc	Tahira younas vs public at...	Huma Nisar Vs Tariq Shaf...	Munaza Hameed Vs Uma...	Raja Mobeen Akhtar v/s U...	
Ahmad Ali Vs Muhammad...	+5 more	+5 more	Huma Nisar Vs Raja Qaise...		Muhammad Aqeel Vs Mu...	
26	27	28	29	30	31	01
Malik Liaqat Iqbal Vs Sada...	Manzoor Ahmad Vs Khali...	Afzana Bibi vs Hafiz Ul As...	Malik Sadaqat Vs Malik L...			
+2 more		Asad Ali Vs Pak Suzuki M...	+2 more			

4.2 Creating a New Case

Adding a new case is simple. From the Cases list view, click the "+ Create Case" button and fill out the comprehensive form, which includes sections for **Case Details**, **Contact Information**, **Additional Information** (for fees and timesheets), and **Attachments**.

Step 1: From the Cases list view, click the "+ Create Case" button.

Home
Cases
Invoice
Projects
Contacts
Associates
Law Books
Links
Settings

Cases

+ Create Case
Custom Fields

Search Cases

Filter by
Sort By
Print
Customize

Sr #	Court Case #	Case Type	Case Stage	Case Title	Court Name	Next Date
1		Suit For Recovery	Arguments	United Foam Industries v/s M/s EFU,etc	Insurance Tribunal Lahore	15/05/25
2			Written Arguments	Mst Noor Begum v/s Umara, ETC	Board of revenue	27/05/25
3		Banking law	Jawab Ul jawab	National Bank of Pakistan v/s M/s United Foam Industries, Etc	Banking court -V- Lahore	31/07/25
4	195113	Suit for Declaration	Notices	Habib Ullah Asim Vs Mumtaz Begum etc	Civil Court Model Town, Lahore	02/10/25
5	117515	Recovery Suit	For evidence of plaintiff	Huma Nisar Vs Tariq Shafqat, etc	Civil Court, Lahore	04/10/25
6	269681423	Suit for Declaration & Declaration	انتظار حکم عدالت حکم نگرانی	Huma Nisar Vs Raja Qaiser etc	Civil Court, Lahore	04/10/25
7	123	Administrative Law	Arguments on Application	1234	Abd	04/10/25

Step 2: Fill out the **Create Case** form. The form is divided into clear, collapsible sections.

Create Case

1. Case Details

Office File Number

e.g., 12345-A

Court Case Number

e.g., 6789

Case Title

e.g., John Doe v. Jane Doe

Case Type

Type to search or create new entry

Case Stage

Type to search or create new entry

Court Name

e.g., Supreme Court

Judge Name

Type to search or create new entry

City

Type to search or create new entry

Counsel For

e.g., Plaintiff

Next Date

Pick a date

Notes

e.g., Important notes

Custom Fields

No custom fields added

Add Custom Field

Attachments



Drag and drop files, or click to select

Used: 310 KB / 50 MB (49.7 MB available)

2. Contact Information

3. Additional Information

4. Hidden Fields

Create Case

- **Case Details:** Enter the core information like Office File Number, Court Case Number, Case Title, Type, Stage, Court Name, Judge Name, and Next Date.
- **Contact Information:** Link the case to existing contacts for your Client, the Opponent, and the Opponent's Lawyer.

Digital Lawyer Diary

Home
 Cases
 Invoice
 Projects
 Contacts
 Associates
 Law Books

Edit Case

1. Case Details

2. Contact Information

Client Name

Select a contact...

Opponent Name

Select a contact...

Opponent Lawyer

Select a contact...

3. Additional Information

4. Hidden Fields

Save

- Additional Information:** This section is for financial tracking and time management. You can add Timesheet Entries, set the Case Fee and Charges, and log Payments received. The system will automatically calculate the Total and Remaining Fee.



1760179185954

- Attachments:** Drag and drop files directly into the upload area or click to select them from your computer. This is perfect for storing petitions, orders, and other relevant documents. (**50 MB Limit Per Account**) with more option for Enterprise accounts

Home
 Cases
 Invoice
 Projects
 Contacts
 Associates
 Law Books
 Links
 Settings

Notes

e.g., Important notes

Custom Fields

No custom fields added

Add Custom Field

Attachments

Drag and drop files, or click to select

Loading storage usage...

2. Contact Information

3. Additional Information

4. Hidden Fields

Pro Tip: On-the-Fly Entries For fields like Case Type, Stage, Judge, etc., you don't need to have everything pre-configured. Simply start typing a new entry (e.g., a new Judge's name). If it doesn't exist, an **" + Add entry"** option will appear. Click it to add the new option to your list permanently without leaving the form!

Digital Lawyer Diary

Home | Cases | Invoice | Projects | Contacts | Associates | Law Books | Links | Settings

Case Stage
Type to search or create new entry

Court Name
e.g., Supreme Court

Judge Name
Type to search or create new entry

Q Add

+ Add entry "Add"

Yahya Afridi, Muhammad Shafi Saddique & Shakeel Ahmad Bench no 1

CJ-Yahya Afridi + J-Muhammad Shafi Saddique + J-Shakil Ahmad (Bench # 1)

Malik Sajid ADJ, Sheikhupura

Mehar Abid Civil Judge MD Lahore

Muhammad Ayub Gull, Family Judge, Lahore

Notes

Step 3: Once all the information is entered, click the blue **"Create Case"** button at the bottom. You will be taken directly to the new case's "Case View" page.

Home | Cases | Invoice | Projects | Contacts | Associates | Law Books | Links | Settings

Custom Fields
No custom fields added
+ Add Custom Field

Attachments
Drag and drop files, or click to select
Used: 310 KB / 50 MB (49.7 MB available)

2. Contact Information

3. Additional Information

4. Hidden Fields

Create Case

Customizing the "Create Case" Form

Your practice is unique, and so are your data needs. You can customize the **Create Case** form to hide fields you don't use.

- While on the "Create Case" page, click the **Customize** icon in the top-right corner.
- A "Customize Form" modal will appear. Uncheck any fields you don't need.
- Click **"Save changes"**. The form will now be streamlined to your preference.

The screenshot shows the 'Case View Page' with a sidebar on the left containing navigation links: Home, Cases, Invoice, Projects, Contacts, Associates, Law Books, Links, and Settings. The main content area includes:

- Next Date:** A date picker with the text 'Pick a date'.
- Notes:** A text area with the placeholder 'e.g., Important notes'.
- Custom Fields:** A section highlighted with a red box, showing 'No custom fields added' and a button to '+ Add Custom Field'.
- Attachments:** A dashed box with a cloud upload icon and the text 'Drag and drop files, or click to select'. Below it, it says 'Used: 310 KB / 50 MB (49.7 MB available)'.
- 2. Contact Information:** An expandable section with a downward arrow.
- 3. Additional Information:** An expandable section with a downward arrow.

The 'Add Custom Field' modal form contains the following fields and options:

- Field Name:** A text input field with the placeholder 'Enter field name'.
- Field Type:** A dropdown menu currently set to 'Text'.
- Scope:** Two radio button options: 'This case' (selected) and 'All cases'.
- Add Field:** A large blue button at the bottom to submit the form.

4.3 The Case View Page: Your Digital Case File

After creating or clicking on an existing case, you'll land on the **Case View** page. This is the detailed file for a single case, containing all its information in one place.

Digital Lawyer Diary

Home
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 Settings

Case View

Copy
 Delete
 History
 Privacy
 Assign
 Export

United Foam Industries v/s M/s EFU, etc

Judge: Ali Akbar Qureshi + Zafar Iqbal Tara, Insurance Tribunal, Lahore
Stage: Arguments
Next date: 15/05/2025 Quick add

Edit

Active

Case Details

Contact Information

Additional Information

Office File No.

05/Insurance Tribunal

Court Case No.

-

Case Type

Suit For Recovery

Hearing Dates

15/05/2025

Previous Date

26/03/2025

Counsel For

Plaintiff

Managing Hearing Dates

Keeping track of hearing dates is critical. Your Digital Diary makes this effortless.

- **Viewing Dates:** All upcoming and previous hearing dates are clearly listed in the **Case Details** tab.
- **Adding the Next Date (Quick Add):** The fastest way to schedule the next hearing is by using the **Quick add** button, located directly next to the "Next date" display. Clicking this opens a mini-calendar, allowing you to select the next date and add it instantly without needing to enter the full edit mode.

Digital Lawyer Diary

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Case View

Copy
 Delete
 History
 Privacy
 Assign
 Export

United Foam Industries v/s M/s EFU, etc

Judge: Ali Akbar Qureshi + Zafar Iqbal Tara, Insurance Tribunal, Lahore
Stage: Arguments
Next date: 15/05/2025 Quick add

Edit

Active

Case Details

Contact Information

Additional Information

Office File No.

05/Insurance Tribunal

Court Case No.

-

Case Type

Suit For Recovery

Hearing Dates

15/05/2025

Previous Date

26/03/2025

Counsel For

Plaintiff

October 2025

Su	Mo	Tu	We	Th	Fr	Sa
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1

Pick a date to add it as the next hearing.

Hearing Dates	15/05/2025
	26/03/2025
	20/02/2025
	28/01/2025
	16/12/2024
	09/12/2024
	26/11/2024
	02/10/2024
	24/07/2024
	25/06/2024
	13/03/2024

The Case Actions Bar

At the top of the Case View page is a powerful action bar that lets you manage every aspect of the case.

Case View [Copy] [Delete] [History] [Privacy] [Assign] [Export]

United Foam Industries v/s M/s EFU, etc [Edit]

Judge: Ali Akbar Qureshi + Zafar Iqbal Tara, Insurance Tribunal, Lahore

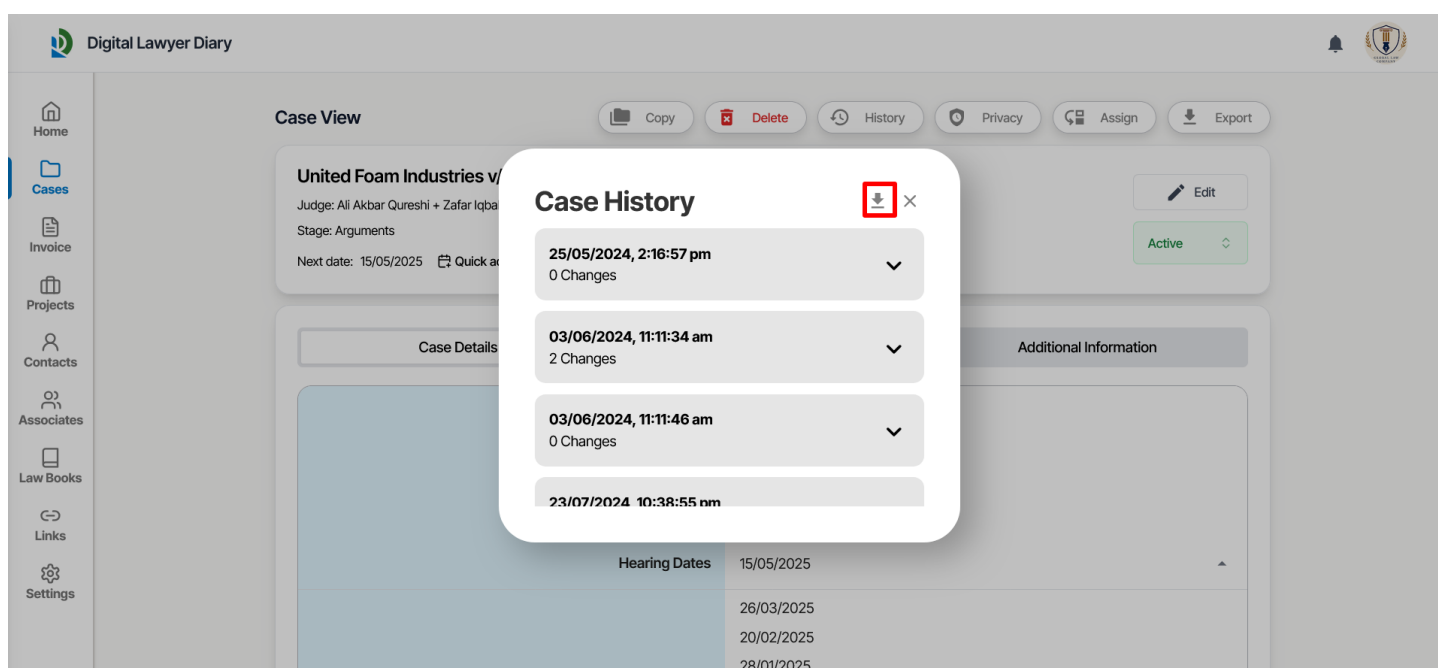
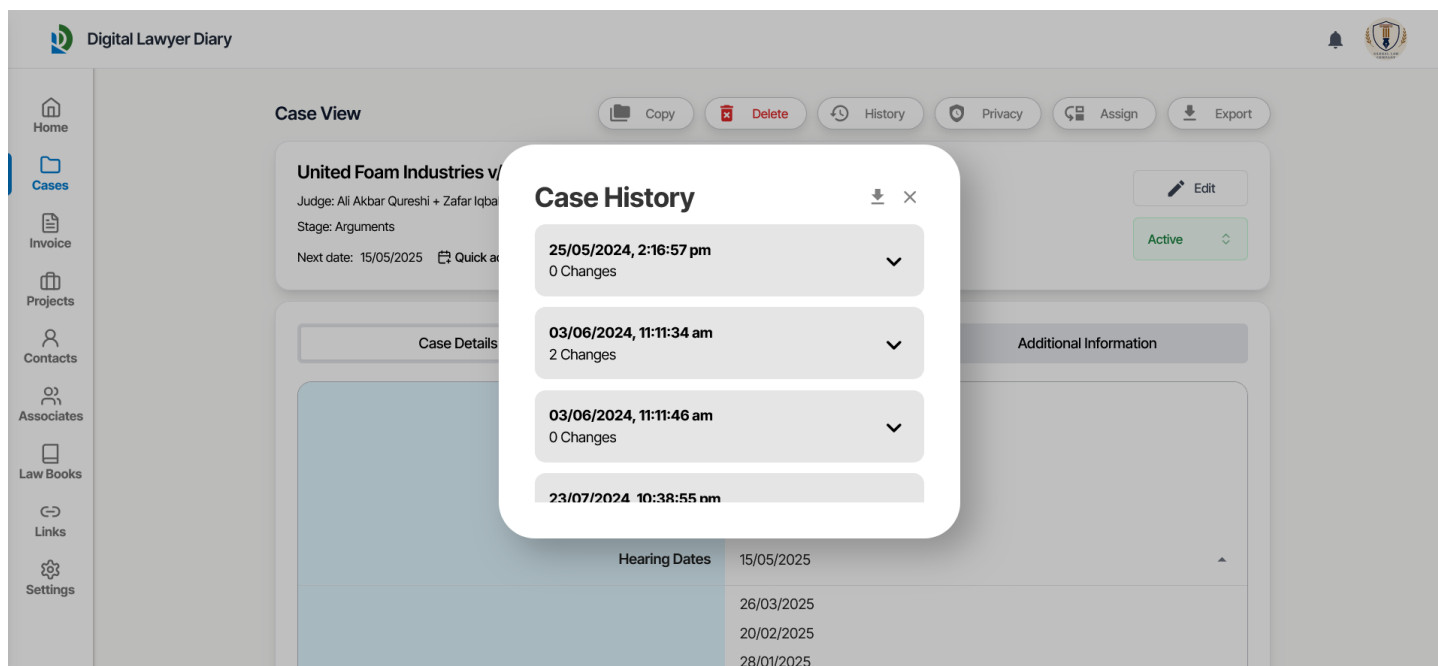
Stage: Arguments

Next date: 15/05/2025 [Quick add] [Active]

Case Details	Contact Information	Additional Information
Office File No.	05/Insurance Tribunal	
Court Case No.	-	
Case Type	Suit For Recovery	
Hearing Dates	15/05/2025 26/03/2025 20/02/2025 28/01/2025	

- **Edit:** Click this to enter **Edit Mode** and update any case information.
- **Status Dropdown (Active/Archived/Decided):** Quickly update the case's current status.
- **Copy, Delete, Privacy, Assign:** Tools to duplicate, remove, set permissions for, or assign the case.
- **Export:** Generate a PDF of the case details, fees, or all information combined.
- **History (Audit Trail):** This is one of the most powerful features for accountability and tracking. Clicking **History** opens a window with a complete, timestamped log of every change ever made to the case.
 - It shows **when** the change was made.
 - It shows **who** made the change (by username).
 - It shows exactly **what** was changed (e.g., "Case Name changed from '123' to '1234'").
 - **Download History:** Inside the Case History window, click the **download icon** to export this complete log as a file for your records or for reporting purposes.

Note: The **Assign** action draws from the Team Members you have already invited through the [Associates module](#). If you don't see a colleague listed, invite them as an associate first and then return to assign the case.



5. Invoice Management: From Billing to Paid

The **Invoice** module streamlines your entire billing process, allowing you to create professional invoices, track payments, and monitor your firm's financial health at a glance.

To begin, click on **Invoice** in the main navigation menu.

5.1 The Invoice Dashboard

The main invoice page gives you a high-level financial overview and a detailed list of all your invoices.

Home

Cases

Invoice

Projects

Contacts

Associates

Law Books

Links

Settings

Invoices

Total Invoices

0

All time

Total Revenue

Rs 0.00

Rs 0.00 collected

Outstanding

Rs 0.00

0 unpaid

Paid Invoices

0

Rs 0.00 received

Search 6 invoices...

Filter

Invoice ID ↑↓	Client Name	Issue Date ↑↓	Due Date ↑↓	Amount ↑↓	Status ↑↓
INV-2025-003	Irtaza Shah	Oct 11, 2025	Nov 10, 2025	Rs 4,200.00	partial
INV-2025-002	Irtaza Shah	Jun 6, 2025	Jul 6, 2025	Rs 2,000.00	draft
INV-2025-001	Irtaza Shah	Jun 6, 2025	Jul 6, 2025	Rs 400.00	draft
INV-2025-696	Irtaza Shah	Jun 6, 2025	Jul 6, 2025	Rs 3,600.00	draft
INV-2025-363	Tariq Javed	May 1, 2025	May 31, 2025	Rs 14,000.00	paid
INV-2025-702	Muzamil	Apr 29, 2025	May 29, 2025	Rs 400.00	paid

- Financial Summary:** At the top, you'll find key metrics:
 - Total Invoices:** A count of all invoices ever created.
 - Total Revenue:** The total value of all invoices.
 - Outstanding:** The total amount of money that is yet to be paid across all unpaid invoices.
 - Paid Invoices:** The total number of fully paid invoices.
- Invoice List:** A searchable and sortable table of every invoice. You can quickly see the Client Name, Issue Date, Due Date, Amount, and current **Status** (e.g., Draft, Paid, Partial).

5.2 Setting Up Your Invoices (First-Time Setup)

Before creating your first invoice, it's a great idea to customize it with your firm's branding.

Step 1: From the Invoice Dashboard, click the **Settings** button in the top-right corner.

Digital Lawyer Diary

Home

Cases

Invoice

Projects

Contacts

Associates

Law Books

Links

Settings

Settings

General

Language

Invoices

Invoice Settings

Customize your invoice settings here

Logo

Currency

Rs (PKR)

Sample amount: Rs 1,234.56

Template

Classic

Modern

Detailed

Invoice Numbering

Automatic Numbering

Automatically generate sequential invoice numbers

Invoice Prefix

INV

This will appear before the year and number (e.g., INV-2025-001)

Next Invoice Number

4

The next invoice will be: INV-2025-004

Save Changes

Step 2: Customize your invoice settings:

- **Logo:** Upload your law firm's logo. This will appear on every PDF invoice you generate.
- **Currency:** Select your primary currency (e.g., Rs (PKR)).
- **Template:** Choose a look and feel for your invoices. "Detailed" is a great professional option.
- **Invoice Numbering:**
 - Enable **Automatic Numbering** to let the system generate sequential invoice numbers for you.
 - Set an **Invoice Prefix** (e.g., INV). The system will automatically add the year.
 - Set the **Next Invoice Number** to start your sequence from a specific number (e.g., 1 or 101).

Step 3: Click **Save Changes**. Your invoices are now ready to be created with a professional, branded look.

5.3 Creating a New Invoice

Step 1: From the Invoice Dashboard, click the "+ Create Invoice" button.

Digital Lawyer Diary

Home

Cases

Invoice

Projects

Contacts

Associates

Law Books

Links

Settings

Create Invoice

Client/Paralegal *

Select a contact...

Invoice Number *

INV-2025-004

Associated Case (Optional)

Select a case to associate with this invoice

Invoice Date *

October 11th, 2025

Due Date *

November 10th, 2025

Case Reference (Optional)

Enter case reference

Case Matter Type (Optional)

Enter case matter type

Items *

Product Name	Quantity	Rate	Tax	Amount	Actions
+ Type to search or create new entry	- 1 +	0	0 %	Rs 0.00	✓
Total:				Rs 0.00	

Subtotal:

Rs 0.00

Discount Type

Percentage (%)

Discount (%)

0

Tax:

Rs 0.00

Total:

Rs 0.00

Notes

Add notes or payment instructions...

Create Invoice

Step 2: Fill in the Core Details

- **Client/Paralegal:** Select the client you are billing from your contacts list.
- **Associated Case (Optional but Powerful):** Select the specific case this invoice is for. This will automatically link the invoice to the case file and can pre-fill other fields like Case Reference and Matter Type.
- **Invoice & Due Date:** Set the issue date and the date the payment is due.

Step 3: Add Line Items (Services and Charges) This is where you detail the services you are billing for.

Page 17 of 87

Home

Cases

Invoice

Projects

Contacts

Associates

Law Books

Links

Settings

Select a case to associate with this invoice

Case Reference (Optional)
Enter case reference

Case Matter Type (Optional)
Enter case matter type

Items *

Product Name	Quantity	Rate	Tax	Amount	Actions
Legal services	1	Rs 4,000.00	0%	Rs 4,000.00	
Stamp duty	1	Rs 2,000.00	0%	Rs 2,000.00	
+ Legal services - 1 + 4000 0 % Rs 4,000.00					
Total:				Rs 6,000.00	

Subtotal:

Rs 6,000.00

Discount Type

Discount (%)

Home

Cases

Invoice

Projects

Contacts

Associates

Law Books

Links

Settings

Select a case to associate with this invoice

Case Reference (Optional)
Enter case reference

Case Matter Type (Optional)
Enter case matter type

Items *

Product Name	Quantity	Rate	Tax	Amount	Actions
Legal services	1	Rs 4,000.00	0%	Rs 4,000.00	
Stamp duty	1	Rs 2,000.00	0%	Rs 2,000.00	
+ Type to search or create new entry - 1 + 0 0 % Rs 0.00					
Total:				Rs 6,000.00	

Subtotal:

Rs 6,000.00

Discount Type

Discount (%)

- In the **Product Name** field, select a service from your saved list (e.g., "Legal services") or type a new one and click ****** + Add entry '**New Service**' to save it for future use.
- Enter the **Quantity** (e.g., hours) and the **Rate**. The system automatically calculates the Amount.
- Add applicable **Tax (%)** if needed.
- Click the **green checkmark** to add the item to the invoice.
- You can add multiple line items (e.g., "Legal Services," "Stamp duty," "Photocopying Charges"). The system will keep a running **Total**.

Step 4: Add Notes and Finalize

- Add any payment instructions or notes for your client in the **Notes** text box.
- Review the final total and click the **"Create Invoice"** button.

Home

Cases

Invoice

Projects

Contacts

Associates

Law Books

Links

Settings

Stamp duty

Legal services

- 1 +

4000

0 %

Rs 4,000.00

✓

Total: Rs 6,000.00

Subtotal: Rs 6,000.00

Discount Type

Percentage (%)

Discount (%)

0

Tax: Rs 0.00

Total: Rs 6,000.00

Notes

Add notes or payment instructions...

Create Invoice

5.4 The Invoice View Page: Managing Payments and Actions

After creating an invoice, you are taken to its detailed view. Here you can track its status, record payments, and perform other actions.

Digital Lawyer Diary

Home

Cases

Invoice

Projects

Contacts

Associates

Law Books

Links

Settings

Invoice

←

Print

Duplicate

Edit

Delete

Amount Due: Rs 2,000.00

Due Date: July 6, 2025 (Overdue)

Make Payment

Payment History

Date	Method	Reference	Amount
No payment history available			
Total Paid:			Rs 0.00

#INV-2025-002

Draft

Client

Irtaza Shah

Invoice Date

June 6, 2025

Due Date

July 6, 2025 (Overdue)

Case Reference

Not specified

Subtotal:

Rs 2,000.00

0

Total:

Rs 2,000.00

Total Paid:

Rs 0.00

Amount Due:

Rs 2,000.00

Invoice Items

Product Name	Quantity	Price	Tax %	Amount
Legal services	5	Rs 400.00	0%	Rs 2,000.00
Subtotal:				Rs 2,000.00
Total:				Rs 2,000.00

Created: June 6, 2025

Last Updated: October 4, 2025

Key Features:

- Status Banner:** A prominent banner at the top shows the **Amount Due** and the due date. Its color indicates if it's current, due soon, or overdue.

- **Payment History:** A table that logs every payment made against this invoice.
- **Action Bar:** At the top, you have several options:
 - **Print:** Generate a professional PDF of the invoice.
 - **Duplicate:** Create a new, identical invoice.
 - **Edit:** Modify the invoice details.
 - **Delete:** Remove the invoice.

Recording a Payment

Step 1: From the Invoice View page, click the blue **"Make Payment"** button.

Digital Lawyer Diary

Invoice

Amount Due: Rs 2,000.00
Due Date: July 6, 2025 (Overdue)

Make Payment

Payment History

Date	Method	Reference	Amount
No payment history available			
Total Paid:			Rs 0.00

#INV-2025-002 Draft

Client: Irtaza Shah
Invoice Date: June 6, 2025
Due Date: July 6, 2025 (Overdue)
Case Reference: Not specified

Subtotal: Rs 2,000.00
0

Digital Lawyer Diary

Invoice

Amount Due: Rs 2,000.00
Due Date: July 6, 2025 (Overdue)

Payment History

Date	Method	Reference	Amount
No payment history available			

#INV-2025-002 Draft

Client: Irtaza Shah
Invoice Date: June 6, 2025
Due Date: July 6, 2025 (Overdue)
Case Reference: Not specified

Subtotal: Rs 2,000.00
0

Record Payment

Record a payment for invoice #INV-2025-002. Amount due: Rs 2,000.00

Payment Amount: Rs 2000

Payment Date: October 11th, 2025

Payment Method: Cash

Reference (Optional): Transaction ID, Cheque number, etc.

Add a reference number for this payment if applicable.

Record Payment

Step 2: In the "Record Payment" pop-up:

- Enter the **Payment Amount**. You can enter a partial amount or the full amount.
- Select the **Payment Date** and **Payment Method** (e.g., Cash, Bank Transfer).
- Add an optional **Reference** number (like a check number or transaction ID).
- Click **"Record Payment"**.

The invoice will instantly update:

- The **Payment History** will show the new payment.
- The **Amount Due** in the status banner will decrease.
- The invoice status will change from **Draft** to **Partial** (if partially paid) or **Paid** (if fully paid).

Digital Lawyer Diary

Home

Cases

Invoice

Projects

Contacts

Associates

Law Books

Links

Settings

Invoice

Print
 Duplicate
 Edit
 Delete

Amount Due: Rs 500.00
 Due Date: July 6, 2025 (Overdue)

Make Payment

Payment History

Date	Method	Reference	Amount
October 11, 2025	Cash	-	Rs 1,500.00
Total Paid:			Rs 1,500.00

#INV-2025-002 Partial

Client
 Irtaza Shah

 Case Reference
 Not specified

Invoice Date
 June 6, 2025

Due Date
 July 6, 2025 (Overdue)

Subtotal:	Rs 2,000.00
0	
Total:	Rs 2,000.00
Total Paid:	Rs 1,500.00
Amount Due:	Rs 500.00

Invoice Items

Product Name	Quantity	Price	Tax %	Amount
Legal services	5	Rs 400.00	0%	Rs 2,000.00
Subtotal:				Rs 2,000.00
0				
Total:				Rs 2,000.00

Created: June 6, 2025

Last Updated: October 4, 2025

5.5 Printing and Sharing Your Invoice

Step 1: From the Invoice View page, click the **Print** button.

Step 2: A professional, multi-page PDF will be generated and downloaded. This document is ready to be emailed or printed for your client. It includes:

- Your firm's logo and contact details.
- The client's information.
- A clear breakdown of services and charges.
- A summary of the total amount, amount paid, and the final **Balance Due**.
- A detailed history of all payments made.



INVOICE

Global Law Company

3rd Floor, Ahmad & Shafi Plaza, 13-Fane Road, Lahore
Phone: +92 333 4125951
Email: globallawcompany@gmail.com

Invoice Number: INV-2025-002
Invoice Date: June 6, 2025
Due Date: July 6, 2025
Status: PARTIAL

BILL TO

Irtaza Shah
No address provided

CASE INFORMATION

Case Reference: N/A
Matter Type: Legal Consultation
Service Period: June 6, 2025 - July 6, 2025

SERVICES PROVIDED

Description	Quantity/Hours	Rate	Tax Rate	Amount
Legal services	5	Rs 400.00	0%	Rs 2,000.00

Subtotal: Rs 2,000.00

Tax (0%): Rs 0.00

Total: Rs 2,000.00

Amount Paid: Rs 1,500.00

Balance Due: Rs 500.00

PAYMENT HISTORY

Date	Method	Reference	Amount
October 11, 2025	cash	N/A	Rs 1,500.00

This invoice has been generated using Digital Lawyer Diary

Page 1 of 2

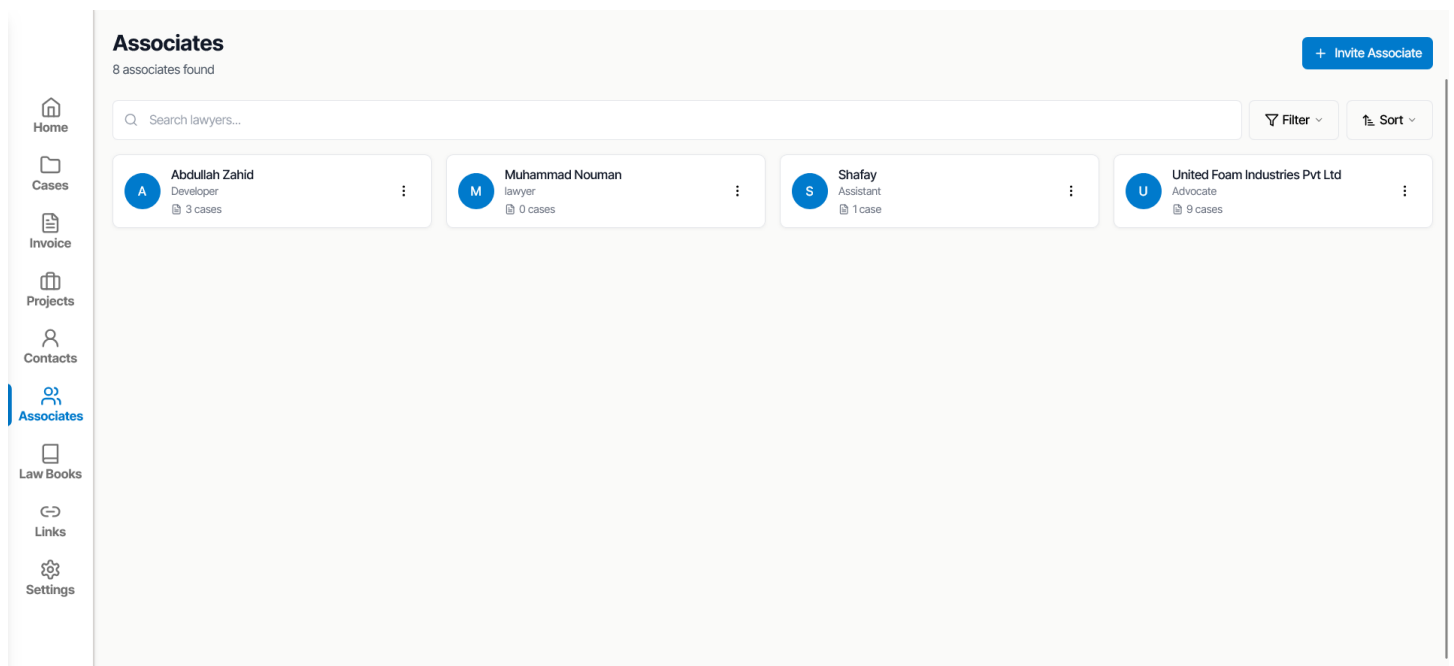
6. Managing Your Team: The Associates Module

Collaboration is at the core of a successful law firm. The **Associates** module allows you to securely invite your partners, junior lawyers, paralegals, and other staff to your Digital Lawyer Diary workspace.

To get started, click on **Associates** in the main navigation menu.

6.1 The Associates Dashboard

This page is your central hub for managing everyone connected to your firm. It's divided into two main sections:



- **Active Team Members:** This is a list of all associates who have accepted your invitation and are currently part of your firm. Each member is displayed on a card showing their name, role, and the number of cases they are assigned to.
- **Pending Invitations You Sent:** This section appears whenever you have an outstanding invitation. It helps you keep track of who has been invited but has not yet responded.

Keeping this list current ensures every Team Member picker throughout the app—including case assignments, invoicing, and project dashboards—has the right people available.

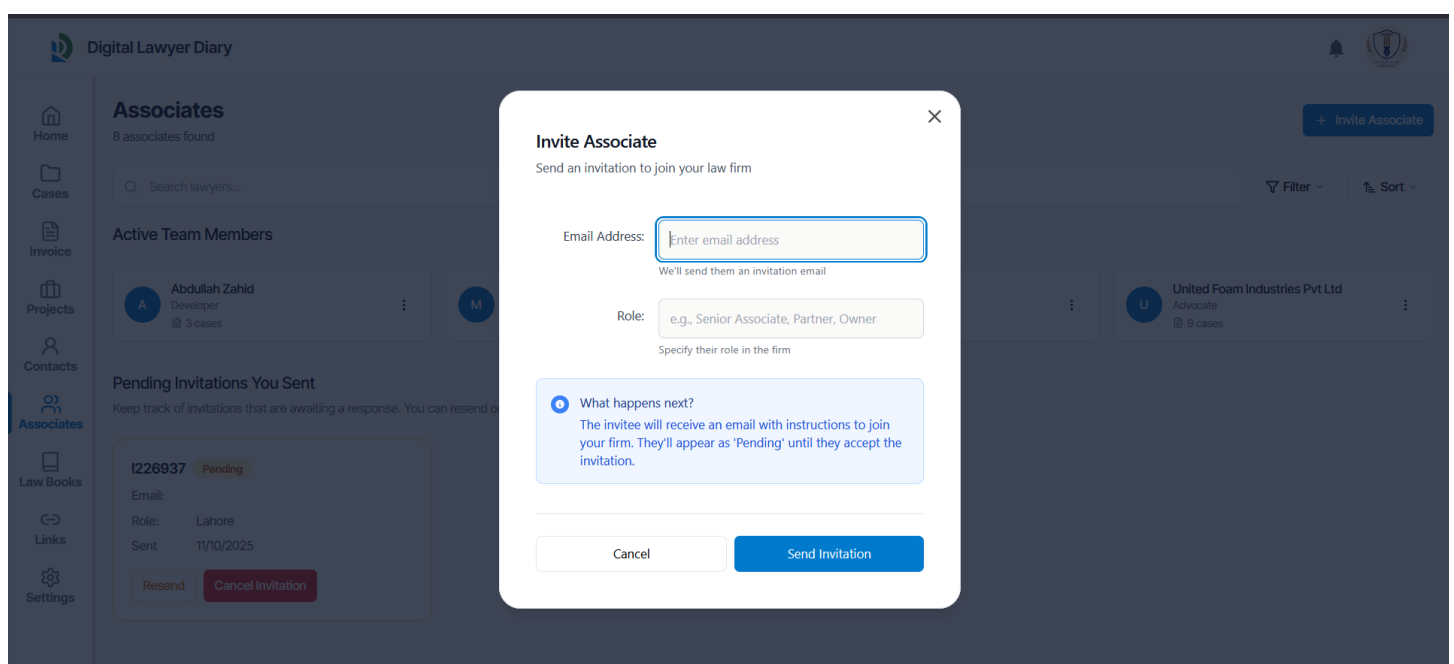
6.2 Inviting a New Associate

Adding a new member to your firm is a simple, secure invitation-based process.

Step 1: From the Associates Dashboard, click the "+ Invite Associate" button in the top-right corner.

Step 2: The **Invite Associate** window will appear. Fill in the required details:

- **Email Address:** Enter the email address of the person you want to invite. They must have or create a Digital Lawyer Diary account with this email.
- **Role:** Specify their role within your firm (e.g., "Partner," "Senior Associate," "Paralegal"). This is for your organizational reference.



What happens next? The system clearly explains the process: The person you invite will receive an email and a notification within their own Digital Lawyer Diary account. They will appear in your "Pending" list until they accept.

Step 3: Click the "Send Invitation" button.

6.3 Managing Pending Invitations

Once the invitation is sent, a new card will appear under the "Pending Invitations You Sent" section.

The screenshot shows the 'Associates' page in the Digital Lawyer Diary. The left sidebar contains navigation links: Home, Cases, Invoice, Projects, Contacts, Associates (highlighted), Law Books, Links, and Settings. The main content area has a header with the 'Associates' title and '8 associates found'. Below this is a search bar and filter/sort options. The 'Active Team Members' section displays four cards for team members: Abdullah Zahid (Developer, 3 cases), Muhammad Nouman (Lawyer, 0 cases), Shafay (Assistant, 1 case), and United Foam Industries Pvt Ltd (Advocate, 9 cases). The 'Pending Invitations You Sent' section includes a sub-header and a note: 'Keep track of invitations that are awaiting a response. You can resend or cancel them anytime.' Below this is a card for invitation ID 'I226937' with a 'Pending' status. It shows the email, role (Lahore), and sent date (11/10/2025). At the bottom of the card are 'Resend' and 'Cancel Invitation' buttons.

This card shows the invitee's email, their assigned role, and a "Pending" status. You have two options here:

- **Resend:** If your associate hasn't seen the invitation, click this to send the invitation email again.
- **Cancel Invitation:** If you sent the invitation by mistake or no longer wish for them to join, click this to revoke the invitation.

6.4 What the Invitee Sees: Accepting the Invitation

Your team member will receive the invitation inside their own Digital Lawyer Diary account.

When they log in and navigate to their "Associates" page, they will see a pending invitation from your firm.

The screenshot shows the 'Associates' page in the Digital Lawyer Diary from the perspective of an invitee. The left sidebar is identical to the previous screenshot, with 'Associates' highlighted. The main content area has a header with the 'Associates' title and '1 associate found'. Below this is a search bar and filter/sort options. The 'Pending Invitations' section displays a card for 'Global Law Company' with the text 'Invited by Global Law Company'. It shows the role (Lahore) and date (11/10/2025). At the bottom of the card are 'Accept' and 'Decline' buttons. Below the pending invitation card is a large empty box with a plus sign icon and the text 'No Associates Found' and 'Get started by inviting associates to join your law firm.'

They have two choices:

- **Accept:** By clicking "Accept," they officially join your firm's workspace. They will then appear in your "Active Team Members" list, and the pending invitation will be removed.
- **Decline:** If they click "Decline," the invitation is rejected and removed.

6.5 Managing Active Team Members

Once an associate has accepted your invitation, their card moves to the "Active Team Members" list.

The screenshot shows the 'Associates' section of the 'Digital Lawyer Diary' application. The header includes the application name, a notification bell, a profile icon, and an 'Invite Associate' button. A sidebar on the left contains navigation links: Home, Cases, Invoice, Projects, Contacts, Associates (highlighted), Law Books, Links, and Settings. The main content area is titled 'Associates' and shows '8 associates found'. It features a search bar and 'Filter' and 'Sort' buttons. Below these are five associate cards, each with a circular profile picture, name, role, and case count, followed by a three-dot menu icon. The cards are: Abdullah Zahid (Developer, 3 cases), Mian Abdullah BSCS 2022 FAST NU ... (lawyer, 0 cases), Muhammad Nouman (lawyer, 1 case), Shafay (Assistant, 1 case), and United Foam Industries Pvt Ltd (Advocate, 9 cases).

From here, you can:

- **Assign them to cases** (as shown in the Case Management section).
- **Manage their permissions** by clicking the **three-dot menu icon** on their card. This allows you to edit their role or remove them from the firm if they leave your practice.

6.6 Assigning and Reviewing Cases

Each associate card includes a **three-dot menu** in the top-right corner. Use it to keep case assignments synchronized:

1. Click **Assign Cases** to open the selection dialog.
2. Search, filter, or scroll through the list, then select one or more matters to share with the associate.
3. Choose **Select Cases to Assign** to confirm. The associate gains immediate access to those files.

Need to audit workloads later? Choose **View Assigned Cases** from the same menu to see everything currently shared with that team member—including status and court details—without leaving the Associates module.

This screenshot shows the same 'Associates' page as before, but with the three-dot menu for 'Mian Abdullah BSCS 2022 FAST NU ...' open. The menu contains four options: 'Assign Cases' (with a folder icon), 'View Assigned Cases' (with a document icon), 'Change Role' (with a person icon), and 'Remove from Firm' (with a red minus icon).

Assign Cases



Select cases to assign to Mian Abdullah BSCS 2022 FAST NU LHR (lawyer).
Selected cases will be accessible to this team member for collaboration.

 Search cases...

Select All

Clear All

Available Cases

177 cases



Huma Nisar Vs Tariq Shafqat, etc

Court: Civil Court, Lahore • Type: Recovery Suit

Active



Hassan Bashir v/s Public at Large etc

Court: Civil Court, Lahore • Type: Suit for Declaration

Active



Malik Liaqat Iqbal Vs Sadaqat Iqbal Malik

Court: Civil Court, Lahore • Type: Civil Law • Client/Pa...

Active



Nosheen Rauf VS Tahira Younas etc

Court: Civil Court, Lahore • Type: Suit for possession

Active



Cancel

Select Cases to Assign

Tip: Use **Select All** or **Clear All** inside the dialog to handle bulk reassignment when someone joins or leaves a matter.

7. Project Management: Organizing Your Legal Work

While the "Cases" module is perfect for litigation and court-related matters, the **Projects** module offers a flexible and powerful way to manage any set of tasks with a defined workflow. This is ideal for internal firm initiatives, complex client matters that aren't in litigation (like a large merger or contract review), or any work that benefits from visual task tracking.

To begin, click on **Projects** in the main navigation menu.

7.1 Creating a New Project

Step 1: From the main Projects page, click the "+ Create Project" button in the top-right corner.

Step 2: Fill out the **New Project** form.

Digital Lawyer Diary

Home

Cases

Invoice

Projects

Contacts

Associates

Law Books

Links

Settings

←

New Project

Project Details

Project Name *

My Law Firm Project

Description

Edit

Preview

This is a demo project

Team Members

Search team members...

Available Team Members

Global Law Company
Lahore

Select All

Clear All

Case Reference

Link to Case (optional)

Select Case...

No cases available

Cancel

Create Project

- Project Details:**
 - Project Name:** Give your project a clear, descriptive name (e.g., "ACME Corp Merger Due Diligence").
 - Description:** Use the rich text editor to provide a detailed overview of the project's goals, scope, and key information. You can use formatting like bold, lists, and links.
- Team Members:** (Optional) You can add existing team members to the project right from the start. We'll cover adding members to an existing project later.
- Case Reference:** (Optional) If this project is directly related to a formal case in your system, you can link them here for easy cross-referencing.

Step 3: Click the "Create Project" button.

7.2 The Project Dashboard: Your Mission Control

After creating your project, you'll be taken to its main dashboard. This is the central hub for everything related to this specific project.

Digital Lawyer Diary

Home

Cases

Invoice

Projects

Contacts

Associates

Law Books

Links

Settings

Projects

1 project found

Settings

+ Create Project

Search projects...

Filter

Sort

My Lawfirm Project

Active

This is demo Project

0/1 tasks

1 Pending

0 Blocked

1 members

PROGRESS

0%

The dashboard is divided into two main areas:

- **Left Panel (Project Overview):** This gives you an at-a-glance summary of the project's health, including its status, task breakdown (Pending, Completed, Blocked), and a list of team members.
- **Right Panel (Task Management):** This is where you'll create, view, and manage all the individual tasks for the project.

7.3 Managing Project Tasks

A project is made up of tasks. Your Digital Diary gives you a flexible system to manage them.

Creating a Task

1. From the Project Dashboard, click the "+ Add Task" button.
2. Fill out the **New Task** form:
 - **Title & Description:** Give the task a clear name and add details.
 - **Stage & Status:** Define where the task is in your workflow (e.g., Stage: **Strategy Planning** , Status: **Pending**).
 - **Due Date:** Assign a deadline.

- **Milestones:** Break down a large task into smaller, trackable sub-tasks.
- **Team Assignment:** Assign the task to a specific team member.

Note: Project assignees come from your Associates list. Make sure the colleague is added in the [Associates module](#) so they appear here.

3. Click "Create Task".

The screenshot shows the 'New Task' form in the Digital Lawyer Diary application. The form is divided into several sections:

- Task Information:** Includes fields for 'Title' (with a red asterisk) and 'Description (Optional)'. The 'Title' field contains 'This is a task' and the 'Description' field contains 'This is my task'. There are 'Edit' and 'Preview' buttons for the description.
- Stage, Status, and Due Date:** Three dropdown menus. 'Stage' is set to 'Review', 'Status' is set to 'Pending', and 'Due Date (Optional)' is set to 'Select due date...'.
- Team Assignment:** Includes a search bar for 'Assign To (Optional)' and a list of 'Available Team Members'. One member, 'Muhammad Nouman' (lawyer), is listed with a radio button next to it.
- Milestones:** A section for 'Milestones (Optional)' with an '+ Add' button and a list of milestones. One milestone, 'This is a milson', is listed with a checkbox and a close button.
- Attachments:** A section for 'Attachments (Optional)' with an '+ Add Files' button and a message 'No files attached. Add relevant documents, images or files'.

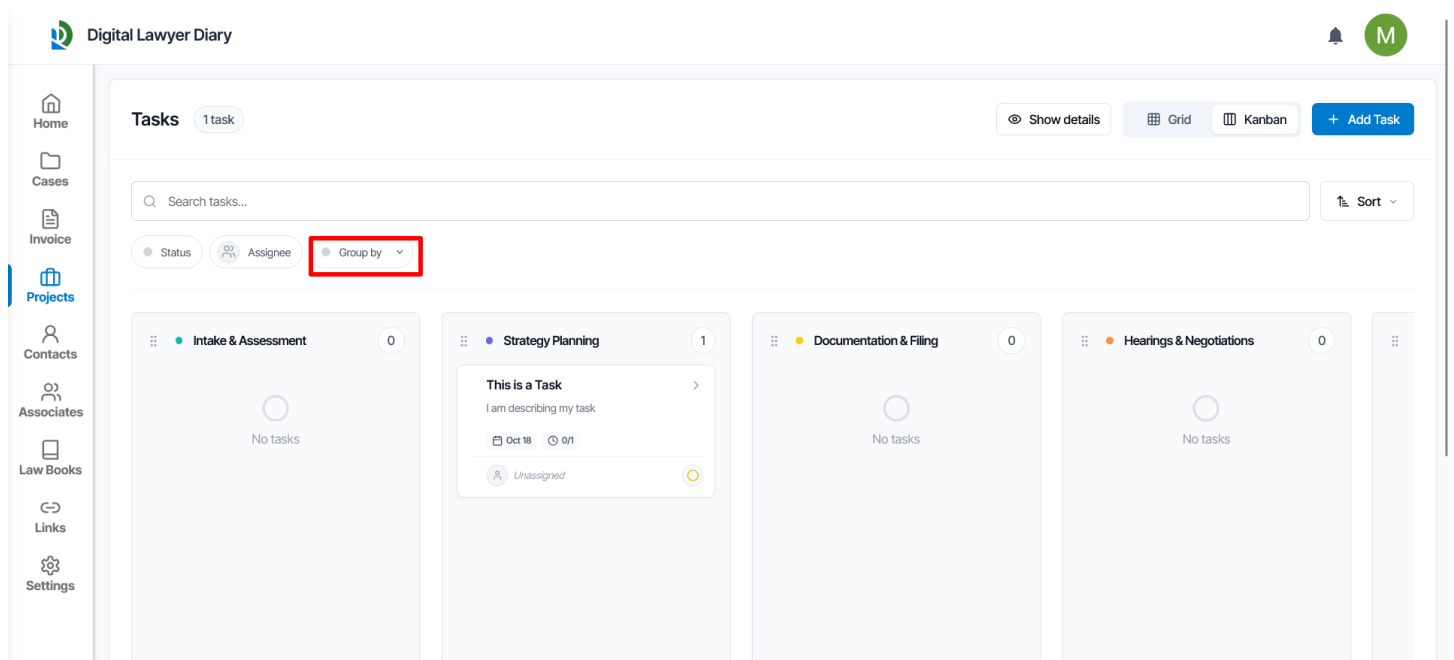
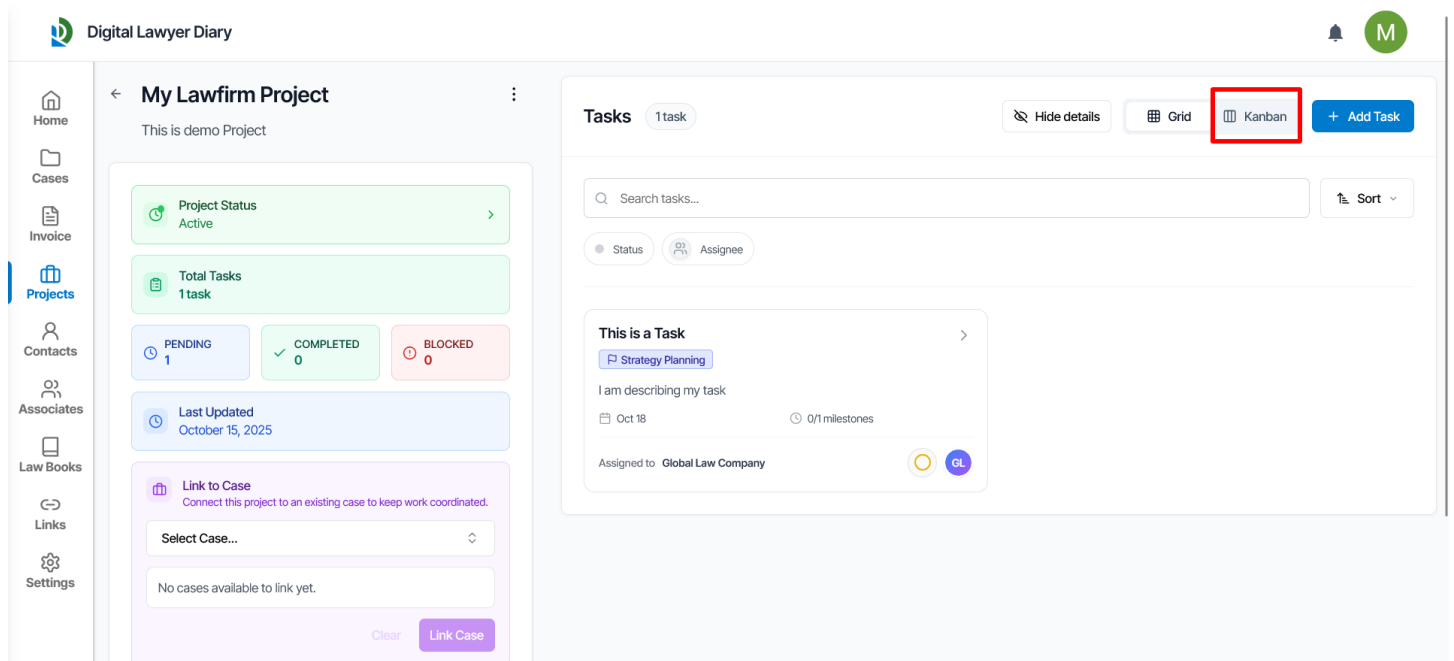
At the bottom of the form, there are 'Cancel' and '+ Create Task' buttons.

Visualizing Your Tasks: The Kanban Board

The most powerful way to view your tasks is with the **Kanban Board**.

1. Click the **Kanban** icon in the top-right of the task area.
2. Your tasks will now be displayed as cards in columns. Each column represents a **Stage** in your project workflow.
3. To update a task's stage, simply **drag and drop** the card from one column to another.

🔥 **Pro Tip:** Need more room? Click **Hide Details** to collapse the left panel and maximize your Kanban workspace.

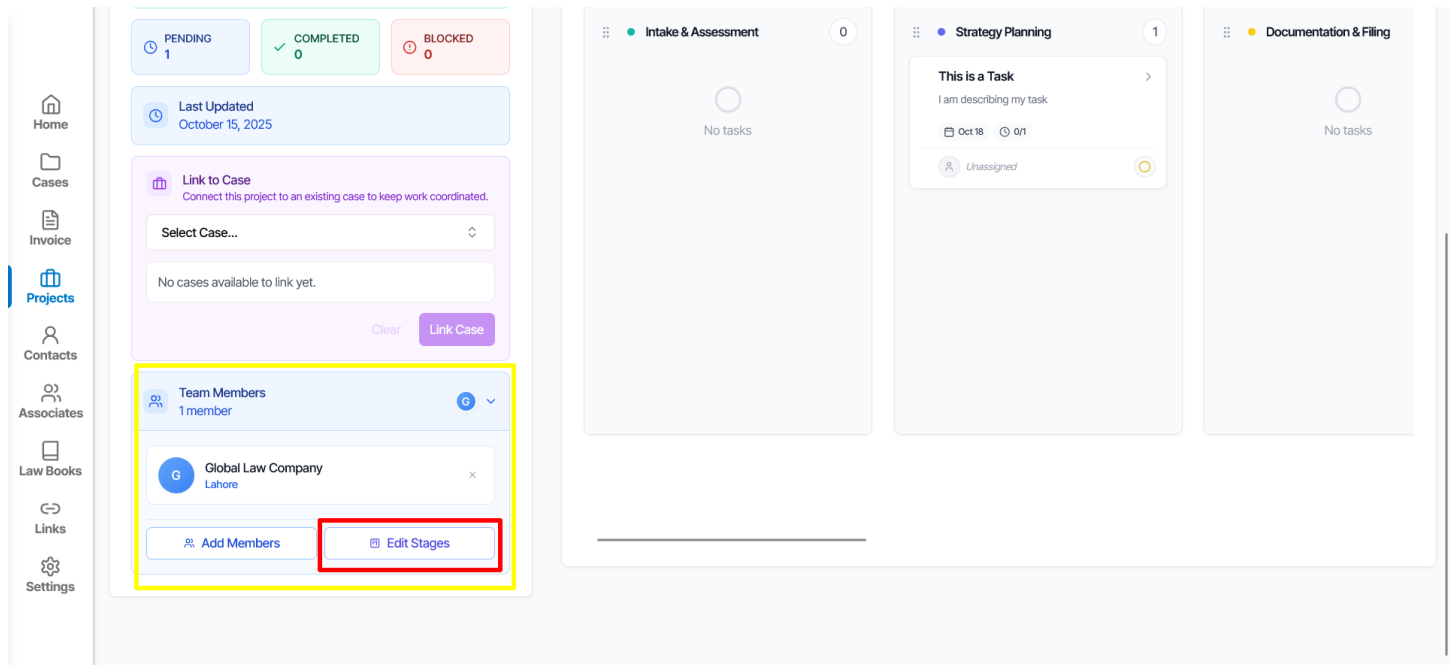


You can also change how the Kanban board is grouped by using the **"Group by"** filter to organize columns by **Status**, **Assignee**, or **Due Date**.

7.4 Personalizing Your Workflow: Project-Specific Stages

Every project is different. A contract review has a different workflow than a property acquisition. Your Digital Diary allows you to **customize the workflow stages for each project individually** without affecting any other project.

Step 1: On your Project Dashboard, find the **"Team Members"** widget on the left panel and click the **"Edit Stages"** button.



Step 2: In the "Edit Project Stages" window, you can fully customize your workflow:

- **Reorder Stages:** Drag and drop the stages to match your real-world process.
- **Edit a Stage:** Click the **pencil icon** to rename a stage or change its color.
- **Delete a Stage:** Click the **trash icon** to remove a stage you don't need.
- **Add a New Stage:**
 1. Click "**+ Add new stage**".
 2. In the "Create New Status" pop-up, give your new stage a **Name** and select a **Color**.
 3. Click "**Create Stage**".



Edit Project Stages

Changes apply only to this project. The first stage in the list becomes the default column on the Kanban board.

Task Status Configuration

The interface displays four task status options, each in a colored rounded rectangle. From top to bottom: 1. 'Intake & Assessment' in teal, with a teal selection circle. 2. 'Strategy Planning' in light blue, with a blue selection circle. 3. 'Documentation & Filing' in yellow, with a yellow selection circle. 4. 'Hearings & Negotiations' in orange, with an orange selection circle. Each option includes a three-dot reorder icon on the left and edit/pencil and delete/trash icons on the right. A fifth, empty light green bar is at the bottom.

Drag and drop to reorder status options. Changes apply to all task status dropdowns.

Renaming or reordering stages refreshes the workflow on the next load. Removed stages will move their tasks to the default stage when the board reloads.

Cancel

Save Stages

Step 3: After making your changes, click "**Save Stages**".

Your Kanban board and the "Stage" dropdown in your tasks will now instantly update to reflect this new, custom workflow, **for this project only**.

7.5 Collaboration: Adding Members and Linking Cases

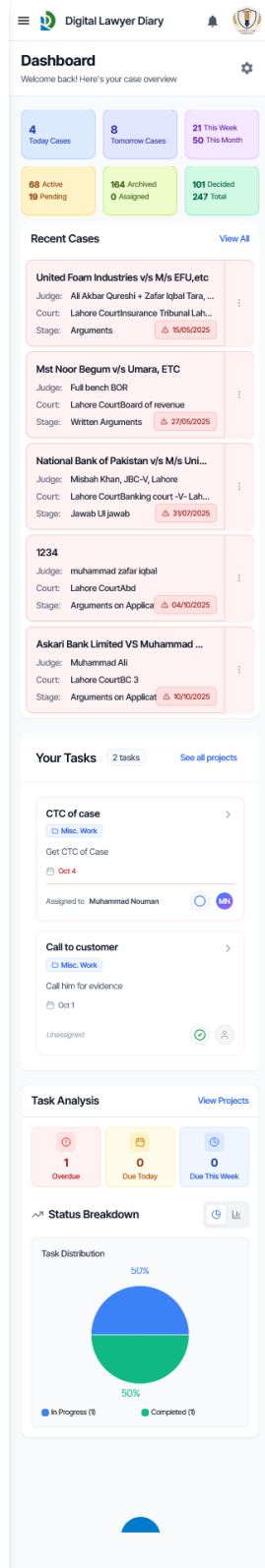
As the project evolves, you can easily manage your team and references.

- **To Add Team Members:** In the left panel, click the "+ Add Members" button in the Team Members widget to add more collaborators.
- **To Link to a Case:** If you didn't link a case during creation, you can do so at any time using the "Link to Case" widget in the left panel.

Mobile Guide

M1. The Dashboard: Your Command Center

Your dashboard is your mission control. It gives you a high-level, at-a-glance overview of your most critical information, from upcoming case dates to your overall case load.



By default, your dashboard includes several informative **widgets**:

- **Today & Tomorrow:** Shows the number of cases scheduled for today and the next day.
- **Status:** A summary of your active and pending cases.
- **Cases:** A count of new cases added this week and this month.

- **Archive & Summary:** An overview of archived, decided, and total cases.
- **Recent Cases:** A list of your most recently updated cases for quick access.
- **Your Tasks:** A list of pending tasks and their deadlines.

The true power of the dashboard is its flexibility. You can completely personalize it to fit your workflow.

M2. Personalizing Your Workspace: Customizing the Dashboard

Think of your dashboard as a set of building blocks (widgets). You can move, resize, add, or remove them to prioritize what's most important to you.

Step 1: Enter Customization Mode

To begin personalizing your layout, click the **gear icon** (⚙️) located at the top right of the dashboard.

 Digital Lawyer Diary





Dashboard

Welcome back! Here's your case overview

4

Today Cases

8

Tomorrow Cases

21 This Week

50 This Month

68 Active

19 Pending

164 Archived

0 Assigned

101 Decided

247 Total

Recent Cases

View All

United Foam Industries v/s M/s EFU...

Judge: Ali Akbar Qureshi + Zafar Iqbal Ta...

Court: Lahore CourtInsurance Tribunal L...

Stage: Arguments

⚠️ 15/05/2025

Mst Noor Begum v/s Umara, ETC

Judge: Full bench BOR

Court: Lahore CourtBoard of revenue

Stage: Written Arguments

⚠️ 27/05/2025

National Bank of Pakistan v/s M/s U...

Judge: Misbah Khan, JBC-V, Lahore

Court: Lahore CourtBanking court -V- L...

Stage: Jawab UI jaw

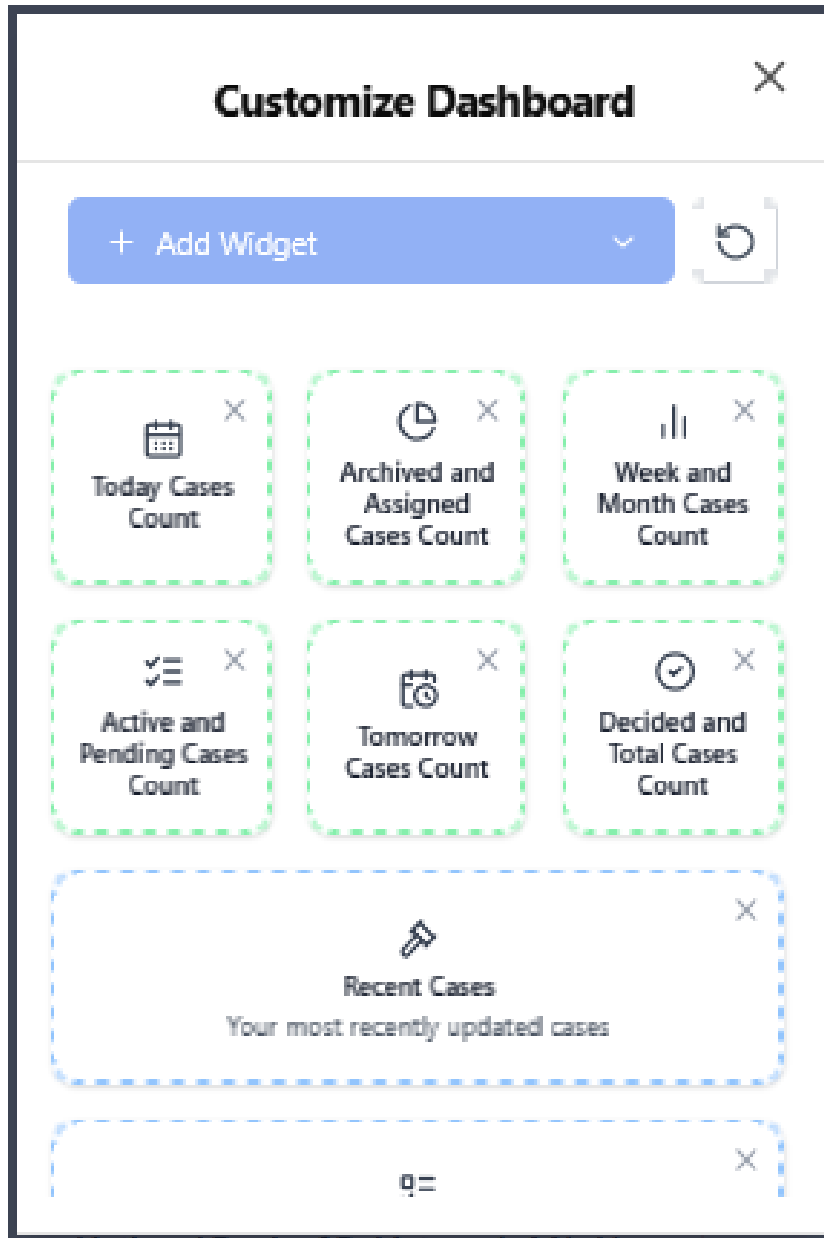
⚠️ 31/07/2025

1234

+

NEW CASE

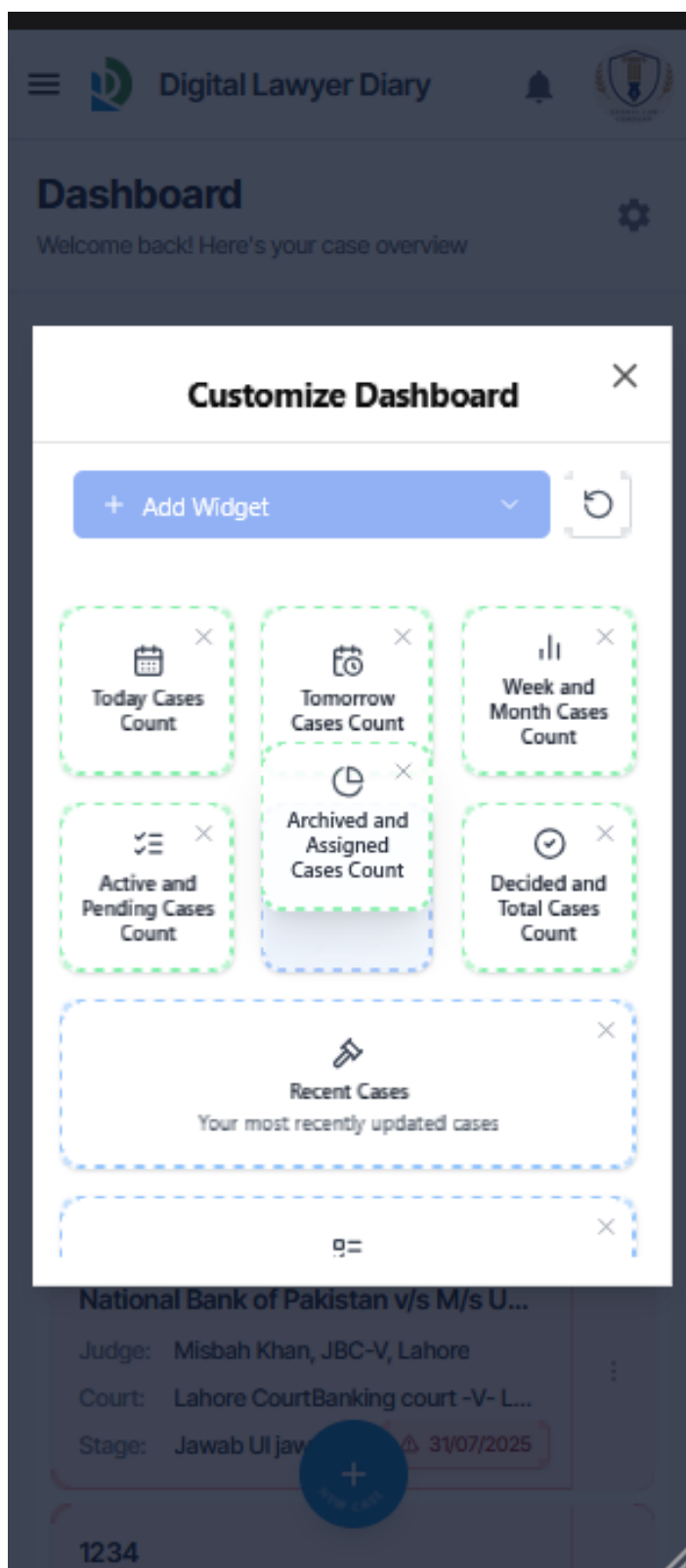
You'll know you're in customization mode when a popup appear



Step 2: Rearrange and Resize Widgets

Once in customization mode, you can organize your workspace.

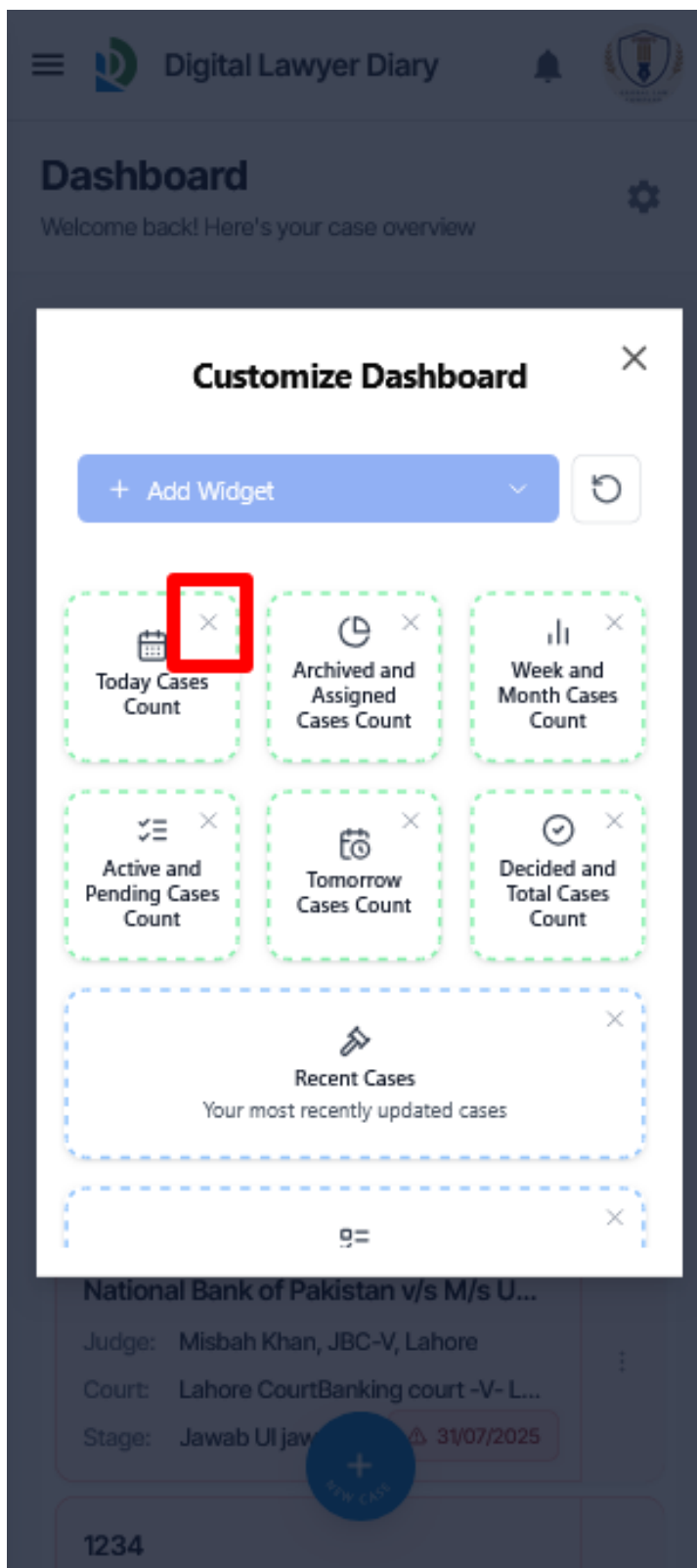
- **To Move a Widget:** Click and hold the widget, drag it to your desired location, and release.
- **To Resize a Widget:** Hover over the bottom-right corner of a widget until your cursor changes, then click and drag to make it larger or smaller.



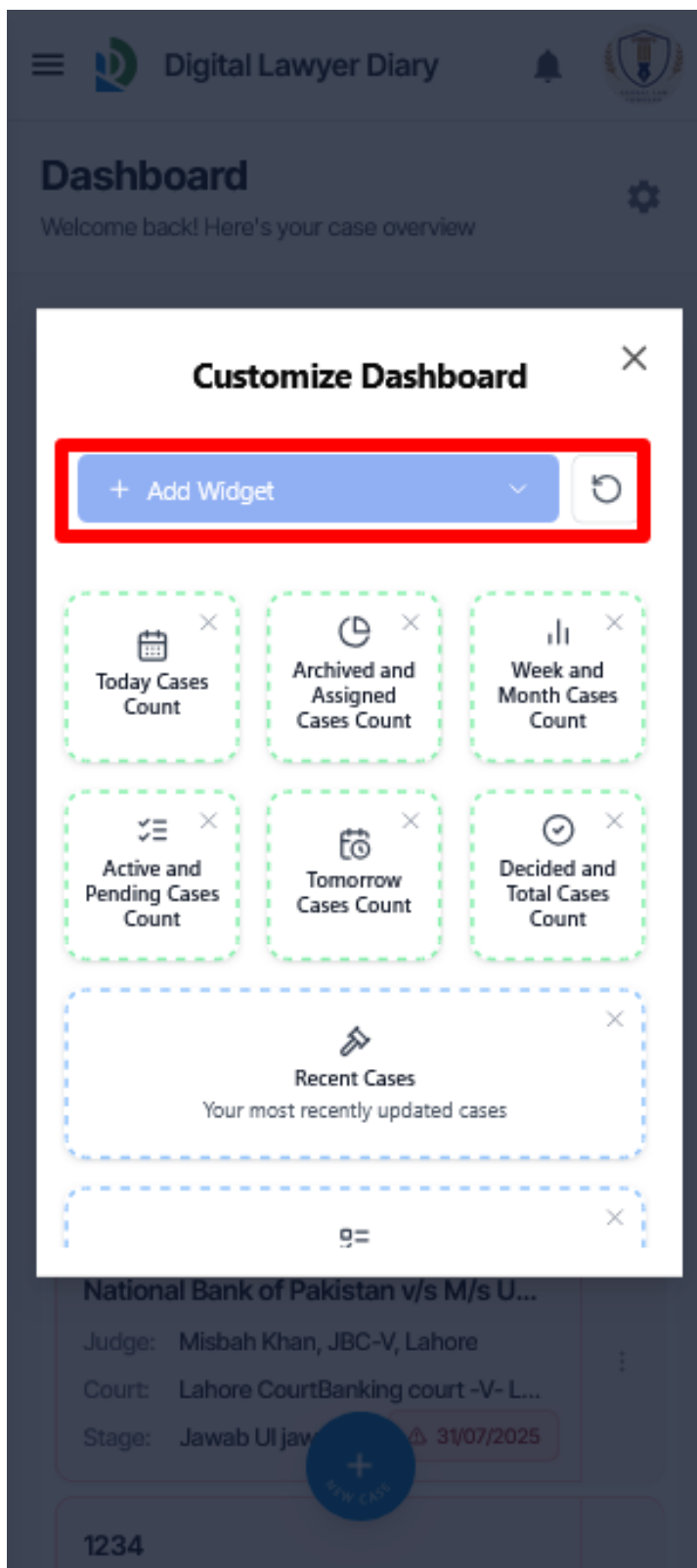
Step 3: Add and Remove Widgets

Tailor the dashboard to show only the information you need.

- **To Remove a Widget:** Click the red 'X' icon that appears at the top-right corner of any widget.



- **To Add a Widget:** Click the blue "+ Add Widget" button at the top of the screen. A dropdown menu will appear with a list of available widgets you can add back to your dashboard. Simply click on one to add it.



Step 4: Save or Reset Your Layout

Once you've finished customizing your dashboard, you have two options:

- **Save Your Changes:** Click the "X" button in the top-right corner of the Customize Dashboard modal to close it and save your personalized layout. Your dashboard will now display exactly as you configured it.
- **Reset to Default:** If you want to start fresh and return to the original layout, click the **reset icon** (↺) located next to the "+ Add Widget" button at the top of the Customize Dashboard modal. This will restore all widgets to their default positions and sizes.

💡 **Tip:** You can return to customization mode anytime by clicking the gear icon (⚙️) again to make further adjustments.

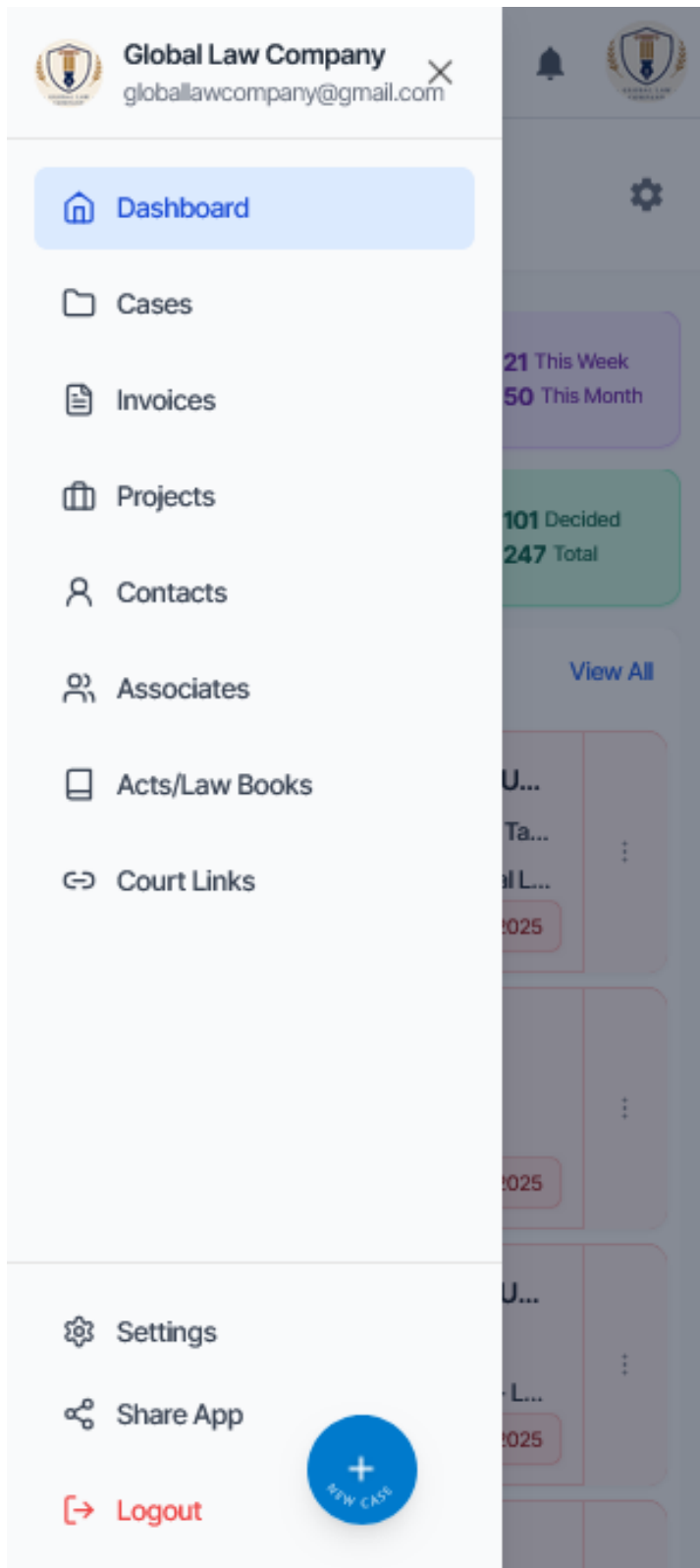
M3. Mobile Navigation: Quick Access on the Go

The mobile interface is designed for efficiency, giving you instant access to all your practice management tools from anywhere. Let's explore how to navigate effectively on your mobile device.

M3.1 Accessing the Sidebar Menu

The main navigation on mobile is accessed through a convenient sidebar menu. To open it:

1. **Tap the menu icon** (☰) located at the top-left corner of your screen, or
2. **Swipe from the left edge** of your screen to reveal the sidebar



The sidebar displays:

- **Your Profile:** At the top, you'll see your firm name and email address with a profile icon
- **Main Navigation Menu:** All key modules are accessible here:
 -  **Dashboard** - Your command center
 -  **Cases** - Manage all your legal cases
 -  **Invoices** - Handle billing and payments
 -  **Projects** - Organize tasks and workflows
 -  **Contacts** - Client and opponent information
 -  **Associates** - Team management
 -  **Acts/Law Books** - Legal reference library
 -  **Court Links** - Quick access to court websites
- **Settings & Tools:** At the bottom of the sidebar:
 -  **Settings** - Configure your preferences
 -  **Share App** - Invite colleagues
 -  **Logout** - Securely sign out

M3.2 Quick Navigation from Dashboard Widgets

Your dashboard widgets are not just for display; they are interactive and provide quick shortcuts:

- **Tap any case** in the "Recent Cases" widget to jump directly to its detailed Case View page
- **Tap case numbers** in the Today/Tomorrow widgets to see scheduled cases
- **Tap task items** to view or update task details

This allows you to quickly jump from a high-level overview to in-depth information without navigating through multiple menus, making your mobile workflow seamless and efficient.

M4. Case Management: The Heart of Your Practice

The **Cases** module is your central repository for all case-related information, from court dates and case numbers to client details and attached documents.

To get started, click on **Cases** in the main navigation menu on the left.

M4.1 The Cases List View

This is your main dashboard for all cases. It provides a comprehensive, sortable table of your entire caseload.


Digital Lawyer Diary





Active
Pending
Decided
Archived

Active Cases

Fields
Print
Calendar

Tahira younas vs public at large

Judge: Qasir Jameel gujar civil judge Lahore

Court: Lahore CourtCivil Court, Lahore

Stage: Notices

22/10/2025

Khalid Rashid Sheikh Vs Ms stexxa Pvt Ltd ...

Judge: Rana Muhammad Abbas, Civil Judge, Laho...

Court: Lahore CourtCivil Court, Lahore

Stage: Reply of Application

05/11/2025

Tahir Iqbal Baig vs CIR

Judge: Bench vi

Court: Lahore CourtIn land tribunal

Stage: Pillimery urgoments

10/11/2025

Farah Deebe Vs Rubina Yasmeen etc

Judge: Taswer Iqbal Civil Judge, Lahore

Court: Lahore CourtCivil Court, Lahore

Stage: Written Statement

16/10/2025

Muhammad Amin Vs DC Sneikhupura

Judge: Tahir Muhammad Khan Civil Judge, Lahore

Here, you have several powerful tools at your disposal:

- **Search Cases:** Use the search bar at the top to instantly find a case by its title, case number, court name, or any other detail.
- **Filter & Sort:** Use the **Filter by** and **Sort By** buttons to narrow down and organize your case list precisely.
- **Print Cause List:** Click the **Print** button to generate a professional, printable PDF of your current case list. Before printing, you can filter the list (e.g., by date) to create a perfect cause list for a specific day or court.

Digital Lawyer Diary

Search Upcoming Hearings

Active

Pending

Decided

Archived

Active Cases

Fields

Print

Calendar

Tahira younas vs public at large Judge: Qasir Jameel gujar civil judge Lahore Court: Lahore CourtCivil Court, Lahore Stage: Notices 22/10/2025	
Khalid Rashid Sheikh Vs Ms stexxa Pvt Ltd ... Judge: Rana Muhammad Abbas, Civil Judge, Laho... Court: Lahore CourtCivil Court, Lahore Stage: Reply of Application 05/11/2025	
Tahir Iqbal Baig vs CIR Judge: Bench vi Court: Lahore CourtIn land tribunal Stage: Pillimery urgoments 10/11/2025	
Farah Deebe Vs Rubina Yasmeen etc Judge: Taswer Iqbal Civil Judge, Lahore Court: Lahore CourtCivil Court, Lahore Stage: Written Statement 16/10/2025	
Muhammad Amin Vs DC Sneikhupura Judge: Tariq Khurshid /Khanuja Member III DPT La	

- **Customize:** Click the **Customize** button to choose which columns are visible in your table, allowing you to see only the information that matters most.
- **Calendar View:** Click the **Calendar View** icon to see your cases plotted on a monthly calendar based on their "Next Date."

Digital Lawyer Diary

Search Upcoming Hearings

Active

Pending

Decided

Archived

Active Cases

Fields

Print

Calendar

Tahira younas vs public at large

Judge: Qasir Jameel gujar civil judge Lahore

Court: Lahore CourtCivil Court, Lahore

Stage: Notices

22/10/2025

Khalid Rashid Sheikh Vs Ms stexxa Pvt Ltd ...

Judge: Rana Muhammad Abbas, Civil Judge, Laho...

Court: Lahore CourtCivil Court, Lahore

Stage: Reply of Application

05/11/2025

Tahir Iqbal Baig vs CIR

Judge: Bench vi

Court: Lahore CourtIn land tribunal

Stage: Pillimery urgoments

10/11/2025

Farah Deebe Vs Rubina Yasmeen etc

Judge: Taswer Iqbal Civil Judge, Lahore

Court: Lahore CourtCivil Court, Lahore

Stage: Written Statement

16/10/2025

Muhammad Amin Vs DC Sneikhupura

Judge: Tariq Khurshid /Khanais Member III DCT La

M4.2 Creating a New Case

Adding a new case is simple. From the Cases list view, click the "+ **Create Case**" button and fill out the comprehensive form, which includes sections for **Case Details**, **Contact Information**, **Additional Information** (for fees and timesheets), and **Attachments**.

Step 1: From the Cases list view, click the "+ **Create Case**" button.

Digital Lawyer Diary

Search Upcoming Hearings

Active

Pending

Decided

Archived

Active Cases

Fields

Print

Calendar

Tahira younas vs public at large

Judge: Qasir Jameel gujar civil judge Lahore

Court: Lahore CourtCivil Court, Lahore

Stage: Notices

22/10/2025

Khalid Rashid Sheikh Vs Ms stexxa Pvt Ltd ...

Judge: Rana Muhammad Abbas, Civil Judge, Laho...

Court: Lahore CourtCivil Court, Lahore

Stage: Reply of Application

05/11/2025

Tahir Iqbal Baig vs CIR

Judge: Bench vi

Court: Lahore CourtIn land tribunal

Stage: Pilimery urgoments

10/11/2025

Farah Deebe Vs Rubina Yasmeen etc

Judge: Taswer Iqbal Civil Judge, Lahore

Court: Lahore CourtCivil Court, Lahore

Stage: Written Statement

16/10/2025

Muhammad Amin Vs DC Sheikhupura

Judge: Tasir Khurshid Khan Civil Judge, Sheikhupura

Court: Sheikhupura District Court

Stage: Written Statement

16/10/2025

Step 2: Fill out the **Create Case** form. The form is divided into clear, collapsible sections.

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Digital Lawyer Diary



Create Case

Customize

1. Case Details

Office File Number

e.g., 12345-A

Court Case Number

e.g., 6789

Case Title

e.g., John Doe v. Jane Doe

Case Type

Type to search or create new entry

Case Stage

Type to search or create new entry

Court Name

e.g., Supreme Court

Judge Name

Type to search or create new entry

City

Type to search or create new entry

Counsel For

e.g., Plaintiff

Next Date

Pick a date

Notes

e.g., Important notes

Custom Fields

No custom fields added

Add Custom Field

Attachments



Drag and drop files, or click to select

Used: 310 KB / 50 MB (49.7 MB available)

2. Contact Information

3. Additional Information

4. Hidden Fields

Create Case

- **Case Details:** Enter the core information like Office File Number, Court Case Number, Case Title, Type, Stage, Court Name, Judge Name, and Next Date.
- **Contact Information:** Link the case to existing contacts for your Client, the Opponent, and the Opponent's Lawyer.

2. Contact Information

Client Name

Select a contact...



Opponent Name

Select a contact...



Opponent Lawyer

Select a contact...



- **Additional Information:** This section is for financial tracking and time management. You can add Timesheet Entries, set the Case Fee and Charges, and log Payments received. The system will automatically calculate the Total and Remaining Fee.

3. Additional Information

Time Sheet

Add new timesheet entry

Case Fee

e.g., \$1000

Case Charge

e.g., \$500

Payment History

Add new payment record

Total Fee: 0

Remaining Fee: 0

- **Attachments:** Drag and drop files directly into the upload area or click to select them from your computer. This is perfect for storing petitions, orders, and other relevant documents. (**50 MB Limit Per Account**) with more option for Enterprise accounts

Attachments



Drag and drop files, or click to select

Used: 310 KB / 50 MB (49.7 MB available)

✨ **Pro Tip: On-the-Fly Entries** For fields like Case Type, Stage, Judge, etc., you don't need to have everything pre-configured. Simply start typing a new entry (e.g., a new Judge's name). If it doesn't exist, an "+ **Add entry**" option will appear. Click it to add the new option to your list permanently without leaving the form!

Judge Name

Type to search or create new entry



As

+ Add entry "As"

Mr. Muhammad Kashif Pasha, Civil Judge,
Lahore



Sadia Aslam CJ Lahore



Naila Naseer Khakwani CJ Lahore



Mr. Justice Shahid Bilal Hasan



Ms. Mehreen Siyab Abbasi, Civil Judge,



Step 3: Once all the information is entered, click the blue "**Create Case**" button at the bottom. You will be taken directly to the new case's "Case View" page.



Create Case

 Customize

1. Case Details



2. Contact Information



3. Additional Information



4. Hidden Fields



Create Case

Customizing the "Create Case" Form

Your practice is unique, and so are your data needs. You can customize the **Create Case** form to hide fields you don't use.

- While on the "Create Case" page, click the **Add Custom Field** icon in the top-right corner.
- A "Customize Form" modal will appear. Add any fields you need.
- Click "**Save changes**". The form will now be streamlined to your preference.

×

Add Custom Field

Field Name:

Enter field name

Field Type:

Text

▼

Scope:

☒ This case

☐ All cases

Add Field

M4.3 The Case View Page: Your Digital Case File

After creating or clicking on an existing case, you'll land on the **Case View** page. This is the detailed file for a single case, containing all its information in one place.



Tahira younas vs public at large

Judge: Qasir Jameel gujar civil judge
Lahore

Stage: Notices



Next date: 22/10/2025  Quick add

Active



Case Details



Contact Information



Additional Information



Managing Hearing Dates

Keeping track of hearing dates is critical. Your Digital Diary makes this effortless.

- **Viewing Dates:** All upcoming and previous hearing dates are clearly listed in the **Case Details** tab.
- **Adding the Next Date (Quick Add):** The fastest way to schedule the next hearing is by using the **Quick add** button, located directly next to the "Next date" display. Clicking this opens a mini-calendar, allowing you to select the next date and add it instantly without needing to enter the full edit mode.



Judge: Qasir Jameel gujar civil judge
Lahore

Stage: Notices



Next date: 22/10/2025 Quick add

Active



Case Details



Office File No.

CS66

Court Case No.

21138325

Case Type

Suit for Declaration

Hearing Dates

22/10/2025



22/09/2025

30/07/2025

19/07/2025

24/06/2025

29/05/2025

14/05/2025

23/04/2025

26/03/2025

22/02/2025

Previous Date

22/09/2025



Judge: Qasir Jameel gujar civil judge
Lahore

Stage: Notices

Next date: 22/10/2025



Quick add



Active



Case Details



Office File No.

CS66

Court Case No.

21138325

Case Type

Suit for Declaration

Hearing Dates

22/10/2025



22/09/2025

30/07/2025

19/07/2025

24/06/2025

29/05/2025

14/05/2025

23/04/2025

26/03/2025

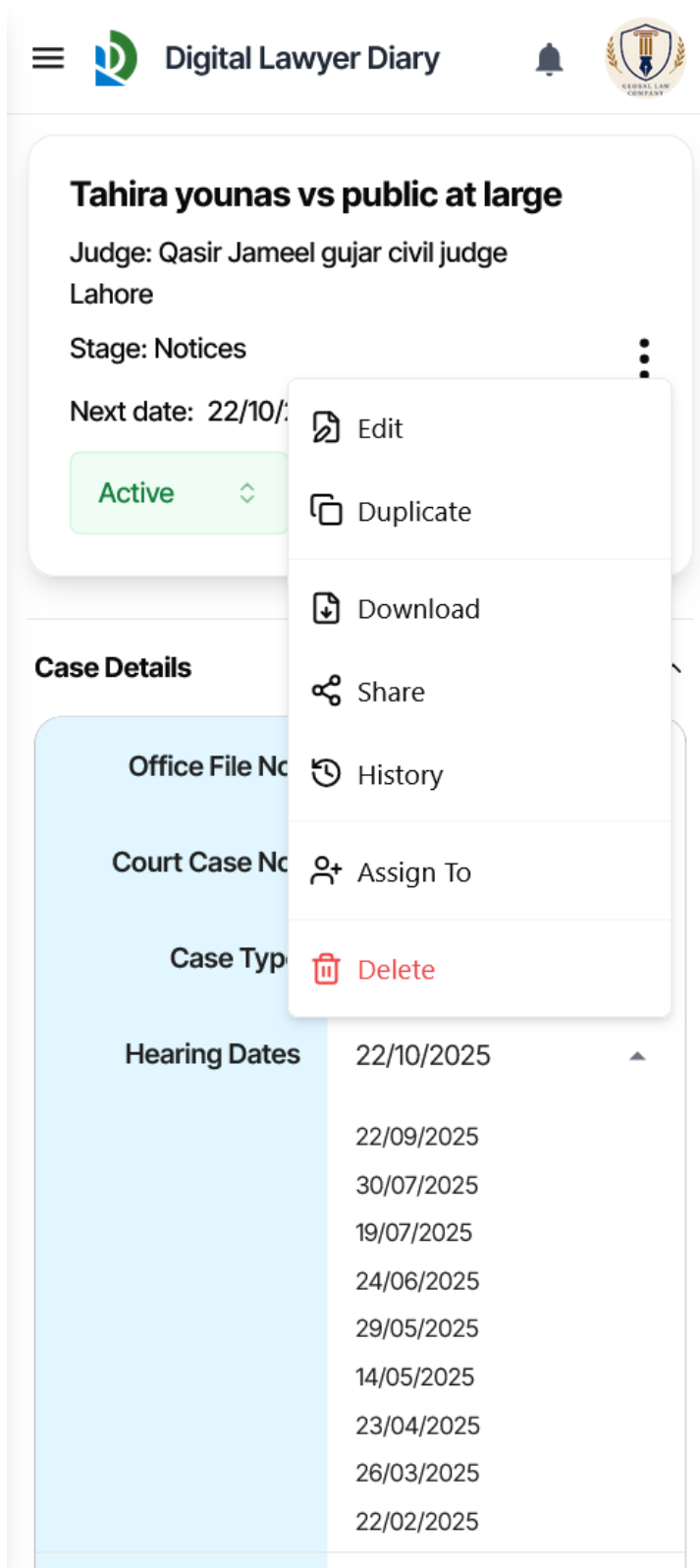
22/02/2025

Previous Date

22/09/2025

The Case Actions Menu

On mobile, case actions are accessible through a convenient three-dot menu (⋮) located in the top-right corner of the Case View page. Tap it to reveal all available case management options.



The actions menu includes:

- **Edit:** Opens the edit mode, allowing you to update any case information including case details, contacts, fees, and attachments.
- **Duplicate:** Creates an exact copy of the current case, perfect for similar cases with the same client or court. You can then modify the duplicated case as needed.
- **Download:** Generates and downloads a comprehensive PDF report of the case, including all case details, hearing dates, fees, and payment history. This is ideal for offline reference or sharing with clients.
- **Share:** Opens your device's native share menu, allowing you to quickly share case information via email, messaging apps, or other installed applications.
- **History (Audit Trail):** This is one of the most powerful features for accountability and tracking. Tapping **History** opens a window with a complete, timestamped log of every change ever made to the case.

- It shows **when** the change was made
 - It shows **who** made the change (by username)
 - It shows exactly **what** was changed (e.g., "Case Name changed from '123' to '1234'")
 - You can download the complete history log for your records or reporting purposes
- **Assign To:** Allows you to assign the case to team members within your firm. This enables collaborative case management where multiple lawyers or paralegals can access and update the same case file.
 - **Delete:** Permanently removes the case from your system. Use this option with caution, as deleted cases cannot be recovered. A confirmation prompt will appear before deletion.

 **Tip:** The **Assign To** option draws from the Team Members you have already invited through the [Associates module](#). If you don't see a colleague listed, invite them as an associate first and then return to assign the case.

Managing Case Status

The case status is one of the most visible elements on the Case View page, displayed as a colored badge just below the case title. Keeping your case status up-to-date helps you organize your practice and quickly identify which cases need attention.

Digital Lawyer Diary



Tahira younas vs public at large

Judge: Qasir Jameel gujar civil judge
Lahore

Stage: Notices

Next date: 22/10/2025  Quick add

Active

✓ Active

Archived

Decided

Office File No.

Court Case No.

Case Type

Hearing Dates

CS66

21138325

Suit for Declaration

22/10/2025

22/09/2025

30/07/2025

19/07/2025

24/06/2025

29/05/2025

14/05/2025

23/04/2025

26/03/2025

22/02/2025

To Change the Case Status:

- Tap the Status Badge** - Look for the status badge displaying the current status (e.g., "Active" with a green background) located below the case title
- Select New Status** - A dropdown menu will appear with three status options:
 - ✓ **Active** - The case is currently ongoing and requires regular attention. This is the default status for new cases.
 - Archived** - The case is completed or inactive, but you want to keep it in your system for reference. Archived cases can be easily filtered out from your active caseload.
 - Decided** - The case has received a final judgment or decision from the court. Use this status for closed cases with final outcomes.
- Status Updates Instantly** - As soon as you select a new status, the badge color will change to reflect the update, and the change will be saved automatically.

Page 54 of 87

Status Color Guide:

-  **Active** - Green background (ready for action)
-  **Archived** - Blue/Gray background (stored for reference)
-  **Decided** - Purple background (finalized)

 **Pro Tip:** Use the status filter in the Cases List View (M4.1) to quickly view only active cases, archived cases, or decided cases. This helps you focus on what matters most at any given time.

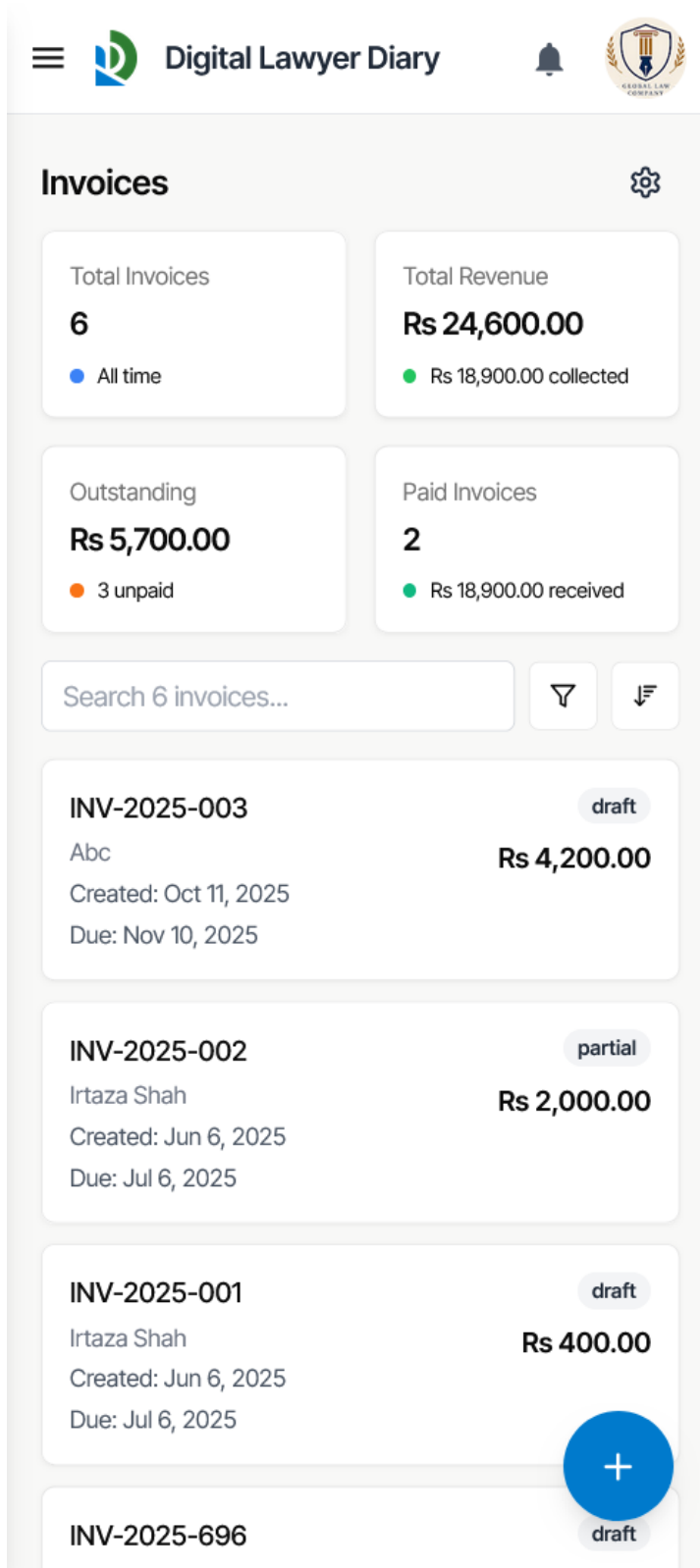
M5. Invoice Management: From Billing to Paid

The **Invoice** module streamlines your entire billing process, allowing you to create professional invoices, track payments, and monitor your firm's financial health at a glance.

To begin, tap on **Invoices** in the main navigation menu.

M5.1 The Invoice Dashboard

The mobile invoice dashboard provides a comprehensive overview of your billing status and all your invoices in an easy-to-scan format.



Financial Summary Cards:

At the top of the dashboard, you'll find four key metric cards that give you instant insight into your firm's financial health:

- **Total Invoices:** Shows the total count of all invoices ever created
 - Displays "All time" to indicate this is a cumulative count
 - Example: "6" invoices
- **Total Revenue:** The complete value of all invoices combined
 - Shows the total amount billed across all invoices
 - Breaks down into "collected" (paid) amounts with a green indicator
 - Example: "Rs 24,600.00" with "Rs 18,900.00 collected"
- **Outstanding:** The most critical metric for cash flow

- Shows the total amount that is yet to be paid across all unpaid/partial invoices
- Displays the number of unpaid invoices with an orange indicator
- Example: "Rs 5,700.00" with "3 unpaid"
- **Paid Invoices:** Your success metric
 - Shows the total number of fully paid invoices
 - Displays the amount received with a green indicator
 - Example: "2" with "Rs 18,900.00 received"

Quick Actions:

- **Settings Icon (⚙️):** Located in the top-right corner, tap this to access invoice configuration settings
- **Create Button (+):** The blue floating action button in the bottom-right corner for creating new invoices
- **Filter Icon:** Tap to filter invoices by status (Draft, Paid, Partial, Overdue)
- **Sort Icon:** Tap to sort your invoice list by date, amount, or client name

Invoice List:

Below the summary cards, you'll see a searchable list of all your invoices. Each invoice card displays:

- **Invoice Number:** (e.g., INV-2025-003)
- **Client Name:** Who the invoice is for
- **Status Badge:** Draft, Partial, or Paid
- **Amount:** The total invoice amount
- **Dates:** Created date and Due date

Search Functionality:

Use the search bar to quickly find invoices by:

- Invoice number
- Client name
- Amount
- Date range

M5.2 Setting Up Your Invoices (First-Time Setup)

Before creating your first invoice, it's essential to customize it with your firm's branding and preferences. This ensures every invoice you generate looks professional and reflects your practice.

Step 1: From the Invoice Dashboard, tap the **Settings icon (⚙️)** in the top-right corner.



Invoices



Total Invoices

6

● All time

Total Revenue

Rs 24,600.00

● Rs 18,900.00 collected

Outstanding

Rs 5,700.00

● 3 unpaid

Paid Invoices

2

● Rs 18,900.00 received

Search 6 invoices...



INV-2025-003

draft

Abc

Rs 4,200.00

Created: Oct 11, 2025

Due: Nov 10, 2025

INV-2025-002

partial

Irtaza Shah

Rs 2,000.00

Created: Jun 6, 2025

Due: Jul 6, 2025

INV-2025-001

draft

Irtaza Shah

Rs 400.00

Created: Jun 6, 2025

Due: Jul 6, 2025



INV-2025-696

draft

Step 2: You'll be taken to the Settings page. Tap on the "Invoices" tab to access invoice-specific settings.

Digital Lawyer Diary



Settings

General

Email

Language

Invoices

Invoice Settings

Customize your invoice settings here

Logo



Currency

Rs (PKR)

Sample amount: Rs 1,234.56

Template

Classic

Modern

Detailed

Invoice Numbering

Automatic Numbering

Step 3: Customize your invoice settings:

Logo Section:

- Tap the logo upload area (shown with a dashed border)
- Upload your law firm's logo from your device
- The logo will appear on every PDF invoice you generate
- Tap the **X** icon if you need to remove or replace the logo

Currency:

- Tap the currency dropdown to select your primary currency
- Options include Rs (PKR), USD, EUR, and many others
- A sample amount shows how numbers will be formatted (e.g., "Rs 1,234.56")

Template:

- Choose the visual style for your invoices
- Three template options are available:
 - ☐ **Classic** - Traditional invoice layout
 - ☐ **Modern** - Contemporary design with clean lines
 - ☒ **Detailed** - Comprehensive layout with all information (recommended for legal practices)
- Tap the radio button next to your preferred template

Invoice Numbering:

- Configure how invoice numbers are automatically generated
- **Automatic Numbering:** Toggle this on to let the system generate sequential invoice numbers
- **Invoice Prefix:** Set a prefix that appears before the number (e.g., INV)
 - The system automatically adds the year (e.g., INV-2025-001)
- **Next Invoice Number:** Set the starting number for your invoice sequence
 - Useful if you're migrating from another system or want to start from a specific number

Step 4: Scroll down and tap "**Save Changes**" to apply your settings.

Your invoices are now configured with professional branding and will automatically follow your numbering scheme!

M5.3 Creating a New Invoice

Creating an invoice on mobile is straightforward and optimized for touch input. The system guides you through each step to ensure all necessary information is captured.

Step 1: From the Invoice Dashboard, tap the blue "+" (**Plus**) button in the bottom-right corner.

Digital Lawyer Diary



Invoices

Total Invoices

6

All time

Total Revenue

Rs 24,600.00

Rs 18,900.00 collected

Outstanding

Rs 5,700.00

3 unpaid

Paid Invoices

2

Rs 18,900.00 received

Search 6 invoices...

INV-2025-003

draft

Abc

Rs 4,200.00

Created: Oct 11, 2025

Due: Nov 10, 2025

INV-2025-002

partial

Irtaza Shah

Rs 2,000.00

Created: Jun 6, 2025

Due: Jul 6, 2025

INV-2025-001

draft

Irtaza Shah

Rs 400.00

Created: Jun 6, 2025

Due: Jul 6, 2025

INV-2025-696

draft

This floating action button is always accessible, allowing you to quickly create a new invoice from anywhere on the invoices page.

Step 2: Fill in the Invoice Details

The Create Invoice form is organized into logical sections. Fill out each field:

Page 61 of 87



Create Invoice

Client/Paralegal *

Muzamil



Associated Case (Optional)

Select a case to associate with this invoice



Case Reference (Optional)

Enter case reference

Case Matter Type (Optional)

Enter case matter type

Invoice Number *

INV-2025-004

Invoice Date *

📅 October 15th, 2025

Due Date *

📅 November 14th, 2025

Items *

+ Add new invoice item

Required Fields:

- **Client/Paralegal** (Required - marked with red *):
 - Tap to open your contacts list
 - Select the client you're billing
 - Example: "Muzamil"
- **Invoice Number** (Required):
 - Auto-generated if you enabled automatic numbering
 - Format: INV-2025-004 (prefix-year-number)
 - Manually editable if needed
- **Invoice Date** (Required):

- Tap the calendar icon to select the issue date
- Defaults to today's date
- Example: October 15th, 2025
- **Due Date** (Required):
 - Tap the calendar icon to select the payment due date
 - Calculates automatically based on your payment terms
 - Example: November 14th, 2025

Optional Fields:

- **Associated Case** (Optional):
 - Tap the dropdown to select a case from your cases list
 - Links the invoice to a specific case file
 - When selected, can auto-fill Case Reference and Matter Type
 - Placeholder: "Select a case to associate with this invoice"
- **Case Reference** (Optional):
 - Enter a reference number or identifier
 - Useful for internal tracking or court references
 - Placeholder: "Enter case reference"
- **Case Matter Type** (Optional):
 - Specify the type of legal matter
 - Examples: "Civil Litigation," "Criminal Defense," "Contract Review"
 - Placeholder: "Enter case matter type"

Step 3: Add Line Items (Services and Charges)

This is the core of your invoice where you detail the billable services.

Associated Case (Optional)

Select a case to associate with this invoice

Case Reference (Optional)

Enter case reference

×

Add New Item

Product Name *

Type to search or create new entry

Quantity *

-

1

+

Rate *

0

Tax *

0

%

Amount (including tax)

Rs 0.00

Add & New

Add

No items added yet. Click 'Add Item' to add your first invoice item.

Subtotal:

Rs 0.00

Discount Type

Discount (%)

Adding Items:

1. Tap the "+ Add new invoice item" button
2. A modal titled "Add New Item" will appear with the following fields:

Item Details:

- **Product Name** (Required):
 - Tap the field to search existing services or create a new one
 - Type to search (e.g., "Legal services," "Consultation," "Court appearance")
 - If the service doesn't exist, an option to create it will appear
 - Saves to your product library for future use
- **Quantity** (Required):

- Use the - and + buttons to adjust the quantity
- Or tap the number field to type directly
- Represents hours, units, or sessions
- Default: 1
- **Rate** (Required):
 - Enter your hourly rate or fixed price
 - Use the up/down arrows or type directly
 - Example: Rs 5,000 per hour
 - Currency matches your settings
- **Tax** (Optional):
 - Enter the tax percentage if applicable
 - Use the up/down arrows or type directly
 - Displays as percentage (%)
 - Default: 0
- **Amount (including tax):**
 - Automatically calculated field (read-only)
 - Formula: $(\text{Quantity} \times \text{Rate}) + \text{Tax}$
 - Updates in real-time as you adjust values
 - Example: Rs 0.00 (updates after entering values)

Action Buttons:

- **"Add & New"** (Blue button): Adds the current item to the invoice and keeps the modal open to add another item immediately. Perfect for multi-item invoices.
- **"Add"** (Blue button): Adds the item and closes the modal, returning you to the main invoice form.

Step 4: Review Totals and Add Notes

After adding items, the invoice automatically calculates:

📅 October 15th, 2025

Due Date *

📅 November 14th, 2025

Items *

+ Add new invoice item

No items added yet. Click 'Add Item' to add your first invoice item.

Subtotal: Rs 0.00

Discount Type

Discount (%)

Percentage (%)



0



Tax: Rs 0.00

Total: Rs 0.00

Notes

Add notes or payment instructions...

Create Invoice

- **Subtotal:** Sum of all line items (before discounts and tax)
 - Example: Rs 0.00 (updates after adding items)
- **Discount Type & Discount (%):**
 - Choose between "Percentage (%)" or "Fixed Amount"
 - Enter the discount value
 - Useful for early payment discounts or negotiated rates
- **Tax:** Calculated total tax amount across all items
 - Example: Rs 0.00
- **Total:** The final invoice amount (Subtotal - Discount + Tax)

- This is the amount your client needs to pay
- Displayed prominently in bold
- Example: Rs 0.00

Notes Section:

- Tap the notes field to add payment instructions or additional information
- Common uses:
 - Payment methods accepted
 - Bank transfer details
 - Payment terms and conditions
 - Thank you message
- Placeholder: "Add notes or payment instructions..."

Step 5: Create the Invoice

Once you've reviewed all information:

1. Scroll to the bottom of the form
2. Tap the blue **"Create Invoice"** button
3. The invoice is saved and you'll be taken to the Invoice View page

 **Pro Tip:** You can save time by creating template items in your product library. Tap "Add new invoice item" and create commonly used services like "Legal Consultation - 1 Hour," "Court Appearance," or "Document Review." These will appear as quick-select options in future invoices!

 **Note:** If you don't see any items added yet, the message "No items added yet. Click 'Add Item' to add your first invoice item" will be displayed to guide you.

M5.4 The Invoice View Page: Managing Payments and Actions

After creating an invoice, you are taken to its detailed view. Here you can track its status, record payments, and perform other actions.

Digital Lawyer Diary

Make Payment

Invoice

#INV-2025-004

Draft

Client

Muzamil

Case Reference

Not specified

Invoice Date

October 15, 2025

Due Date

November 14, 2025

Subtotal:

Rs 680.00

0

Total:

Rs 920.00

Total Paid:

Rs 0.00

Amount Due:

Rs 920.00

Invoice Items

Legal services

1 x Rs 400.00

Tax: 15%

Rs 340.00

Key Features:

- **Status Banner:** A prominent banner at the top shows the **Amount Due** and the due date. Its color indicates if it's current, due soon, or overdue.
- **Payment History:** A table that logs every payment made against this invoice.
- **Action Bar:** At the top, you have several options:
 - **Print:** Generate a professional PDF of the invoice.
 - **Duplicate:** Create a new, identical invoice.
 - **Edit:** Modify the invoice details.
 - **Delete:** Remove the invoice.

Recording a Payment

Step 1: From the Invoice View page, click the blue **"Make Payment"** button.



Make Payment

Invoice



#INV-2025-004

Draft

Client

Muzamil

Case Reference

Not specified

Invoice Date

October 15, 2025

Due Date

November 14, 2025

Subtotal: Rs 680.00

0

Total: Rs 920.00

Total Paid: Rs 0.00

Amount Due: Rs 920.00

Invoice Items

Legal services

1 x Rs 400.00

Tax: 15%

Rs 340.00

Digital Lawyer Diary

Make Payment

Record Payment

Record a payment for invoice #INV-2025-004.
Amount due: Rs 920.00

Payment Amount

Rs 920

Payment Date

October 15th, 2025

Payment Method

Cash

Reference (Optional)

Transaction ID, Cheque number, etc.

Add a reference number for this payment if applicable.

Record Payment

Legal services

1x Rs 400.00

Tax: 15%

Rs 340.00

Step 2: In the "Record Payment" pop-up:

- Enter the **Payment Amount**. You can enter a partial amount or the full amount.
- Select the **Payment Date** and **Payment Method** (e.g., Cash, Bank Transfer).
- Add an optional **Reference** number (like a check number or transaction ID).
- Click "**Record Payment**".

The invoice will instantly update:

- The **Payment History** will show the new payment.
- The **Amount Due** in the status banner will decrease.
- The invoice status will change from **Draft** to **Partial** (if partially paid) or **Paid** (if fully paid).

M5.5 Printing and Sharing Your Invoice

Step 1: From the Invoice View page, click the **Print** button.

The screenshot shows the 'Digital Lawyer Diary' app interface. At the top, there's a navigation bar with a menu icon, the app name, a bell icon, and a logo. Below this is a blue button labeled 'Make Payment'. The main section is titled 'Invoice' and contains a back arrow, a red-outlined 'Print' icon, a share icon, an edit icon, and a trash icon. The invoice details include: Invoice ID #INV-2025-004 (Draft), Client Muzamil, Case Reference Not specified, Invoice Date October 15, 2025, and Due Date November 14, 2025. A summary table shows Subtotal: Rs 680.00, Total: Rs 920.00, Total Paid: Rs 0.00, and Amount Due: Rs 920.00. Below this is the 'Invoice Items' section, listing 'Legal services' for 1 x Rs 400.00 and 'Tax: 15%' for Rs 340.00.

Item	Amount
Subtotal:	Rs 680.00
0	
Total:	Rs 920.00
Total Paid:	Rs 0.00
Amount Due:	Rs 920.00

Item	Amount
Legal services	1 x Rs 400.00
Tax: 15%	Rs 340.00

Step 2: A professional, multi-page PDF will be generated and downloaded. This document is ready to be emailed or printed for your client. It includes:

- Your firm's logo and contact details.
- The client's information.
- A clear breakdown of services and charges.
- A summary of the total amount, amount paid, and the final **Balance Due**.
- A detailed history of all payments made.



INVOICE

Global Law Company
3rd Floor, Ahmad & Shafi Plaza, 13-Fane Road, Lahore
Phone: +92 333 4125951
Email: globallawcompany@gmail.com

Invoice Number: INV-2025-002
Invoice Date: June 6, 2025
Due Date: July 6, 2025
Status: **PARTIAL**

BILL TO

Irtaza Shah
No address provided

CASE INFORMATION

Case Reference: N/A
Matter Type: Legal Consultation
Service Period: June 6, 2025 - July 6, 2025

SERVICES PROVIDED

Description	Quantity/Hours	Rate	Tax Rate	Amount
Legal services	5	Rs 400.00	0%	Rs 2,000.00

Subtotal: Rs 2,000.00

Tax (0%): Rs 0.00

Total: Rs 2,000.00

Amount Paid: Rs 1,500.00

Balance Due: Rs 500.00

PAYMENT HISTORY

Date	Method	Reference	Amount
October 11, 2025	cash	N/A	Rs 1,500.00

This invoice has been generated using Digital Lawyer Diary

Page 1 of 2

M6. Managing Your Team: The Associates Module

Collaboration is at the core of a successful law firm. The **Associates** module allows you to securely invite your partners, junior lawyers, paralegals, and other staff to your Digital Lawyer Diary workspace.

To get started, click on **Associates** in the main navigation menu.

M6.1 The Associates Dashboard

This page is your central hub for managing everyone connected to your firm. It's divided into two main sections:



Digital Lawyer Diary



Associates






Abdullah Zahid

Developer

2 cases





Mian Abdullah BSCS 2022 FAST NU LHR

lawyer

7 cases





Muhammad Nouman

lawyer

0 cases





Shafay

Assistant

1 case





United Foam Industries Pvt Ltd

Advocate

5 cases





- **Active Team Members:** This is a list of all associates who have accepted your invitation and are currently part of your firm. Each member is displayed on a card showing their name, role, and the number of cases they are assigned to.
- **Pending Invitations You Sent:** This section appears whenever you have an outstanding invitation. It helps you keep track of who has been invited but has not yet responded.

Keeping this list current ensures every Team Member picker throughout the app—including case assignments, invoicing, and project dashboards—has the right people available.

M6.2 Inviting a New Associate

Adding a new member to your firm is a simple, secure invitation-based process.

Step 1: From the Associates Dashboard, click the "+ Invite Associate" button in the top-right corner.

Step 2: The **Invite Associate** window will appear. Fill in the required details:

- **Email Address:** Enter the email address of the person you want to invite. They must have or create a Digital Lawyer Diary account with this email.
- **Role:** Specify their role within your firm (e.g., "Partner," "Senior Associate," "Paralegal"). This is for your organizational reference.

The screenshot shows the 'Digital Lawyer Diary' interface. At the top, there's a navigation bar with a menu icon, the app name, a bell icon, and a profile icon. Below this is a section titled 'Associates' with a search bar and filter icons. A card for 'Abdullah Zahid, Developer' is partially visible. Overlaid on this is a white modal titled 'Invite Associate' with a close button (X) in the top right. The modal contains the text 'Send an invitation to join your law firm'. It has two input fields: 'Email:' with a placeholder 'Enter email address' and a note 'We'll send them an invitation email', and 'Role:' with a placeholder 'e.g., Senior Associate, Partner' and a note 'Specify their role in the firm'. At the bottom are two buttons: 'Cancel' and 'Send Invitation'.

What happens next? The system clearly explains the process: The person you invite will receive an email and a notification within their own Digital Lawyer Diary account. They will appear in your "Pending" list until they accept.

Step 3: Click the "Send Invitation" button.

M6.3 Managing Pending Invitations

Once the invitation is sent, a new card will appear under the "Pending Invitations You Sent" section.

Associates

▼
↑

Abdullah Zahid
Developer
2 cases

⋮

Muhammad Nouman
lawyer
0 cases

⋮

Shafay
Assistant
1 case

⋮

United Foam Industries Pvt Ltd
Advocate
5 cases

⋮

Pending Invitations You Sent

Keep track of invitations that are awaiting a response. You can resend or cancel them anytime.

Mian Abdullah BSCS 2022 FAST N...
Pending

Email:
Role: Partner
Sent 15/10/2025

Resend
Cancel Invitation

+

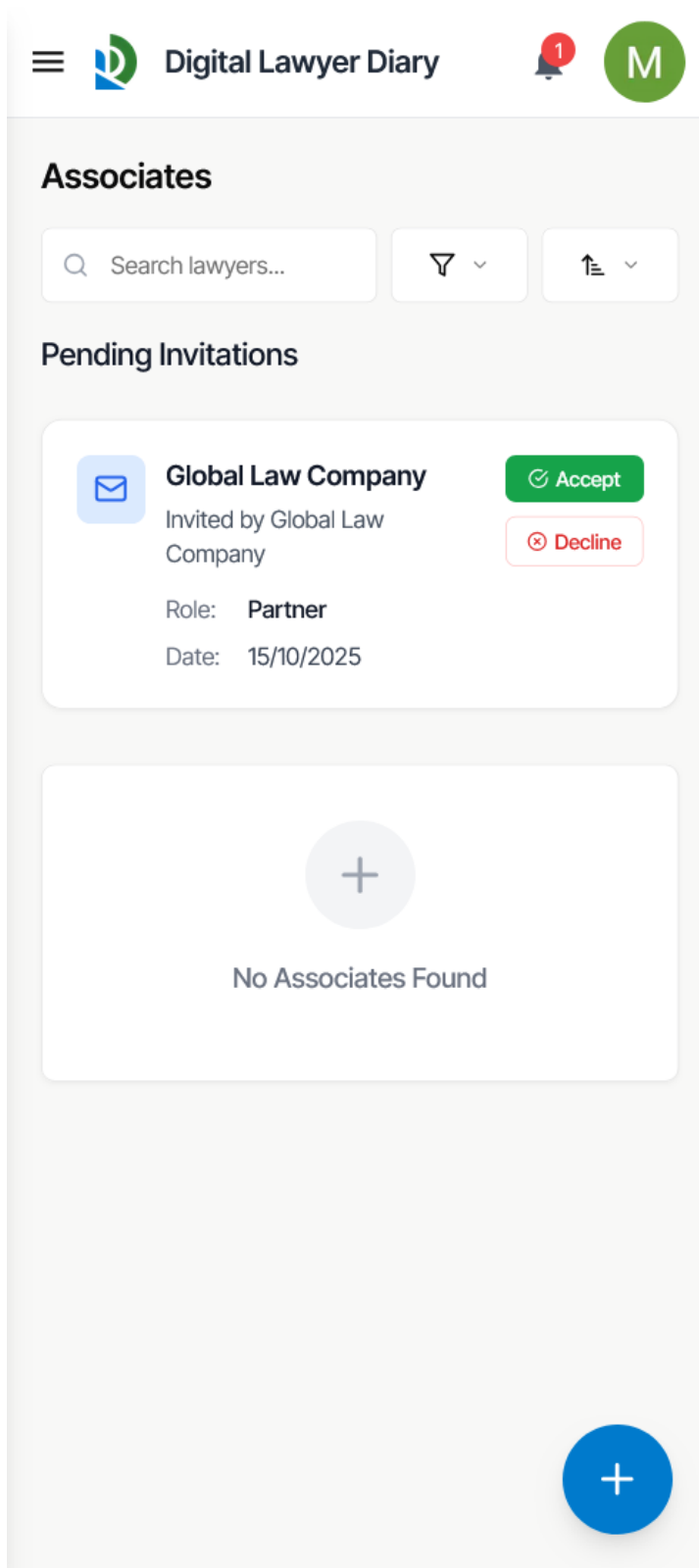
This card shows the invitee's email, their assigned role, and a "Pending" status. You have two options here:

- **Resend:** If your associate hasn't seen the invitation, click this to send the invitation email again.
- **Cancel Invitation:** If you sent the invitation by mistake or no longer wish for them to join, click this to revoke the invitation.

M6.4 What the Invitee Sees: Accepting the Invitation

Your team member will receive the invitation inside their own Digital Lawyer Diary account.

When they log in and navigate to their "Associates" page, they will see a pending invitation from your firm.



They have two choices:

- **Accept:** By clicking "Accept," they officially join your firm's workspace. They will then appear in your "Active Team Members" list, and the pending invitation will be removed.
- **Decline:** If they click "Decline," the invitation is rejected and removed.

M6.5 Managing Active Team Members

Once an associate has accepted your invitation, their card moves to the "Active Team Members" list.


Digital Lawyer Diary



Associates



Abdullah Zahid

Developer

2 cases



Mian Abdullah BSCS 2022 FAST NU LHR

lawyer

0 cases



Muhammad Nouman

lawyer

0 cases



Shafay

Assistant

1 case



United Foam Industries Pvt Ltd

Advocate

5 cases



From here, you can:

- **Assign them to cases** (as shown in the Case Management section).
- **Manage their permissions** by clicking the **three-dot menu icon** on their card. This allows you to edit their role or remove them from the firm if they leave your practice.

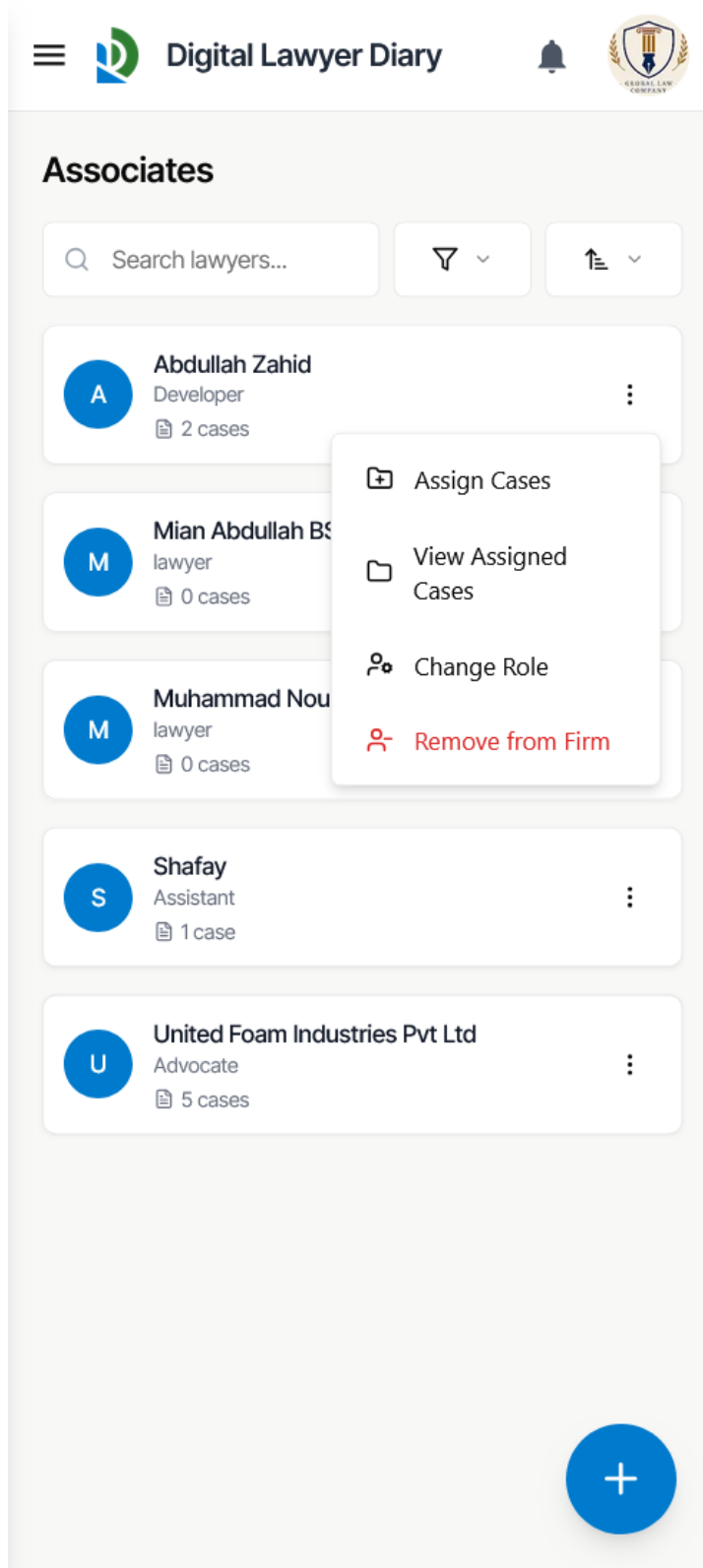
M6.6 Assigning and Reviewing Cases

Each associate card includes a **three-dot menu** in the top-right corner. Use it to keep case assignments synchronized:

1. Click **Assign Cases** to open the selection dialog.
2. Search, filter, or scroll through the list, then select one or more matters to share with the associate.
3. Choose **Select Cases to Assign** to confirm. The associate gains immediate access to those files.

Need to audit workloads later? Choose **View Assigned Cases** from the same menu to see everything currently shared with that team member—

including status and court details—without leaving the Associates module.



Tip: Use **Select All** or **Clear All** inside the dialog to handle bulk reassignment when someone joins or leaves a matter.

M7. Project Management: Organizing Your Legal Work

While the "Cases" module is perfect for litigation and court-related matters, the **Projects** module offers a flexible and powerful way to manage any set of tasks with a defined workflow. This is ideal for internal firm initiatives, complex client matters that aren't in litigation (like a large merger or contract review), or any work that benefits from visual task tracking.

To begin, click on **Projects** in the main navigation menu.

M7.1 Creating a New Project

Step 1: From the main Projects page, click the "+ **Create Project**" button in the top-right corner.

Step 2: Fill out the **New Project** form.

The screenshot shows the 'New Project' form in the Digital Lawyer Diary app. The app's header includes a menu icon, the 'Digital Lawyer Diary' logo, a notification bell, and a user profile icon with the letter 'M'. The form title is 'New Project' with a back arrow. The form is divided into three main sections: 'Project Details', 'Case Reference', and 'Team Members'. The 'Project Details' section has a 'Project Name' field with a red asterisk, containing the text 'This is a new Project'. Below it is a 'Description' section with 'Edit' and 'Preview' buttons, a rich text editor toolbar with icons for bold, italic, heading, list, link, and unlink, and a text area containing 'This is new project'. The 'Case Reference' section has a 'Link to Case' dropdown menu with the text 'Select Case...' and a 'No cases available' message. The 'Team Members' section has a search bar, a list of 'Available Team Members' with one member 'Global Law Company Partner' and a selection radio button, and 'Select All' and 'Clear All' buttons. At the bottom of the form are 'Cancel' and 'Create Project' buttons.

- **Project Details:**

- **Project Name:** (Required) Give your project a clear, descriptive name (e.g., "ACME Corp Merger Due Diligence" or "Q4 Marketing Campaign").
- **Description:** (Optional) Use the rich text editor to provide a detailed overview of the project's goals, scope, and key information.

Toggle between **Edit** and **Preview** modes. You can use formatting options like:

- **Bold (B)** and *Italic (I)*
- **Headings (H)**
- Bullet lists and numbered lists

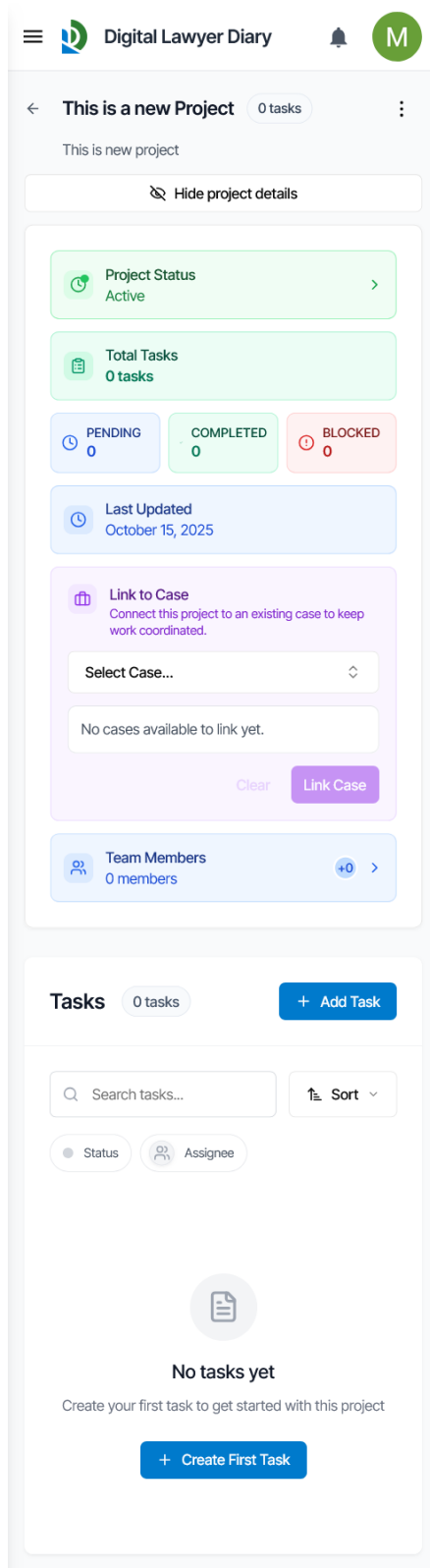
- Links and quotes
- Horizontal separators
- **Case Reference:**
 - **Link to Case:** (Optional) If this project is directly related to a formal case in your system, you can select it from the dropdown to link them for easy cross-referencing. If you don't have any cases yet, you'll see "No cases available."
- **Team Members:**
 - **Search team members...** Use the search box to find and add team members from your associates.
 - **Available Team Members:** Select team members by clicking the checkbox next to their name. You can select individual members or use "**Select All**" to add everyone.
 - **Clear All:** Remove all selections if needed.
 - Team members must be added to your [Associates module](#) before they'll appear in this list.

Step 3: Review your entries and click the "**Create Project**" button at the bottom of the form.

Once created, you'll be taken directly to your new project's dashboard where you can begin adding tasks and managing the workflow.

M7.2 The Project Dashboard: Your Mission Control

After creating your project, you'll be taken to its main dashboard. This is the central hub for everything related to this specific project.



The dashboard is divided into two main areas:

Left Panel (Project Overview): This gives you an at-a-glance summary of the project's health and configuration:

- **Project Status:** Shows whether the project is Active, On Hold, or Completed. Click to change status.
- **Total Tasks:** Quick count of all tasks in this project.
- **Task Status Breakdown:**
 - **PENDING** - Tasks not yet started (shown in blue)
 - **COMPLETED** - Finished tasks (shown in green)
 - **BLOCKED** - Tasks waiting on dependencies (shown in red)
- **Last Updated:** Timestamp showing when the project was last modified.
- **Link to Case:** Connect this project to an existing case for coordination. If no cases are available, you'll see "No cases available to link yet."
- **Team Members:** View all collaborators on this project. Use the "+0" button to add new members or the "Edit Stages" button to

customize the workflow stages.

Right Panel (Task Management): This is where you'll create, view, and manage all the individual tasks for the project:

- Use "+ **Add Task**" to create new tasks
- **Search tasks...** bar to quickly find specific tasks
- **Sort** dropdown to organize tasks by different criteria
- Filter by **Status** or **Assignee** to focus on specific task subsets
- The main area displays all your tasks with their details, including stage indicators, descriptions, milestone progress, and assignment status.

M7.3 Managing Project Tasks

A project is made up of tasks. Your Digital Diary gives you a flexible system to manage them.

Creating a Task

1. From the Project Dashboard, click the "+ **Add Task**" button in the Tasks section.
2. Fill out the **New Task** form with the following information:

←

New Task

Project: This is a new Project

Task Information

Title *

Abdullah

Description (Optional)

Edit

Preview

123

Stage

Intake & Assessment

Status

Pending

Due Date (Optional)

Select due date...

Team Assignment

Assign To (Optional)

No team members available

Add associates to your firm first

Milestones

Milestones (Optional)

+ Add

Test

×

Cancel

+ Create Task

Task Information:

- **Title:** Give the task a clear, descriptive name (required).
- **Description:** (Optional) Add detailed context, notes, or instructions. Supports both Edit and Preview modes for formatted text.
- **Stage:** Select the workflow stage for this task (e.g., Intake & Assessment , Documentation & Filing). The available stages are specific to this project and can be customized.
- **Status:** Set the current status (e.g., Pending , In Progress , Completed , Blocked).
- **Due Date:** (Optional) Assign a deadline to keep the task on track.

Team Assignment:

- **Assign To:** (Optional) Assign the task to a specific team member. The dropdown will show "No team members available" if you haven't added any associates to your firm yet.

Note: Project assignees come from your Associates list. Make sure the colleague is added in the [Associates module](#) before they can appear

here.

Milestones:

- Break down large tasks into smaller, trackable sub-tasks or milestones.
 - Click "+ **Add**" to create new milestones.
 - Check off milestones as they're completed to track progress.
3. Click "**Create Task**" to add the task to your project.

The new task will appear in your Tasks list and can be filtered, sorted, and organized by Status or Assignee.

M7.4 Personalizing Your Workflow: Project-Specific Stages

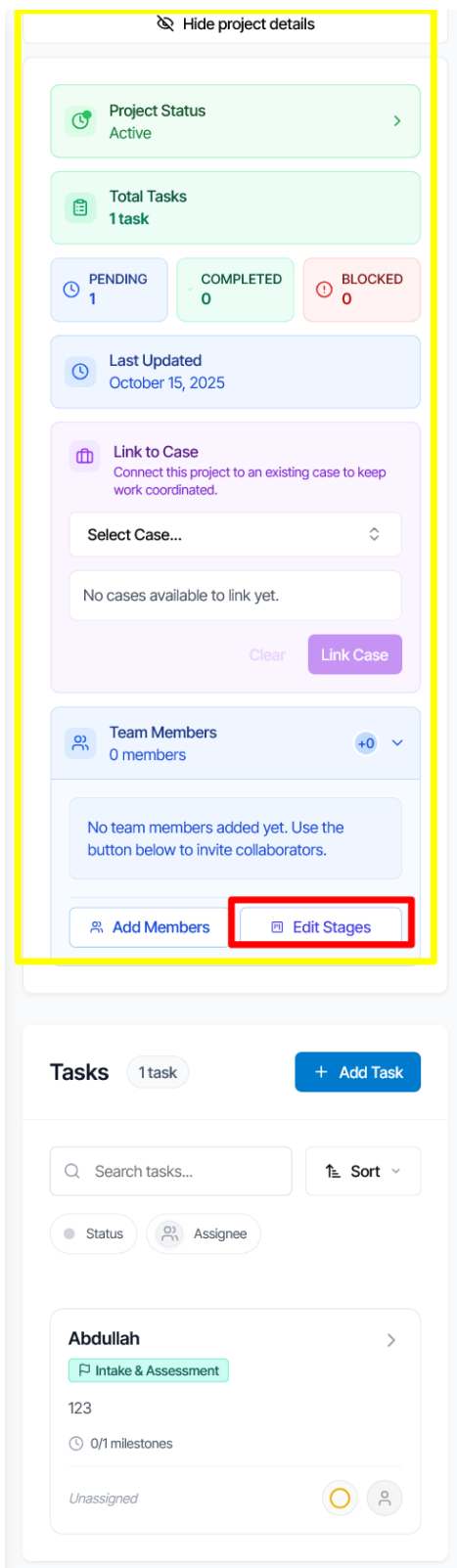
Every project is different. A contract review has a different workflow than a property acquisition. Your Digital Diary allows you to **customize the workflow stages for each project individually** without affecting any other project.

By default, each new project comes with a standard legal matter workflow that includes the following stages:

- **Intake & Assessment** - Initial client consultation and case evaluation
- **Documentation & Filing** - Preparing and filing necessary documents
- **Hearings & Negotiations** - Court proceedings and settlement discussions
- **Resolution & Follow-up** - Final resolution and post-case activities

However, you can fully customize these stages to match your specific project needs.

Step 1: On your Project Dashboard, find the "**Team Members**" widget on the left panel and click the "**Edit Stages**" button.



Step 2: In the "Edit Project Stages" window, you can fully customize your workflow:



Task Stage Configuration

Renaming or reordering stages refreshes the workflow on the next load. Removed stages will move their tasks to the default stage when the board reloads.

Cancel

- Page 86 of 87

Step 3: After making your changes, click "**Save Stages**".

Important Notes:

- *Changes apply only to this project and won't affect other projects.*
- *Renaming or reordering stages refreshes the workflow on the next load.*
- *Removed stages will move their tasks to the default stage (the first stage in your list) when the board reloads.*

Your Kanban board and the "Stage" dropdown in your tasks will now instantly update to reflect this new, custom workflow, **for this project only**.

M7.5 Collaboration: Adding Members and Linking Cases

As the project evolves, you can easily manage your team and references.

- **To Add Team Members:** In the left panel, click the "+ **Add Members**" button in the Team Members widget to add more collaborators.
- **To Link to a Case:** If you didn't link a case during creation, you can do so at any time using the "**Link to Case**" widget in the left panel.

M8. Install as Mobile App (PWA)

Install the Digital Lawyer Diary as a Progressive Web App so it behaves like a native mobile app, launches full-screen, and stays one tap away from your homescreen.

M8.1 Install on Android (Chrome)

1. Open the Digital Lawyer Diary in Chrome and verify you are signed in.
2. Tap the **three dots menu** in the upper-right corner of Chrome.
3. Choose **Add to Home screen** (or **Install app** on newer Android versions).
4. Confirm the suggested name, then tap **Add**. Chrome will place the icon on your home screen or let you drag it where you want it.
5. Launch the new icon once so Android records the app in your recent apps list.

M8.2 Install on iOS (Safari)

1. Open Safari and navigate to the Digital Lawyer Diary while logged in.
2. Tap the **Share** icon (square with an upward arrow) at the bottom of the screen.
3. Scroll the sheet and tap **Add to Home Screen**.
4. Edit the shortcut name if desired, then tap **Add** in the top-right corner.
5. Return to your home screen and launch the new icon to use the diary in a standalone window.

M8.3 Manage the App Experience

- Keep at least one login active so the PWA opens directly without re-entering credentials; the standard session timeout rules still apply.
- Allow notifications when prompted to receive reminders for hearings, invoices, and task updates just like in the browser.
- If the interface looks outdated, open the menu and select **Reload** (Android) or pull down to refresh (iOS) to fetch the latest version.
- To uninstall, remove the homescreen icon; Android will also prompt you to clear the stored data.

Congratulations! You now have access to all the power of your Digital Lawyer Diary, both on desktop and mobile. Whether you're in court, at the office, or on the move, your entire practice is at your fingertips.