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Desktop Guide

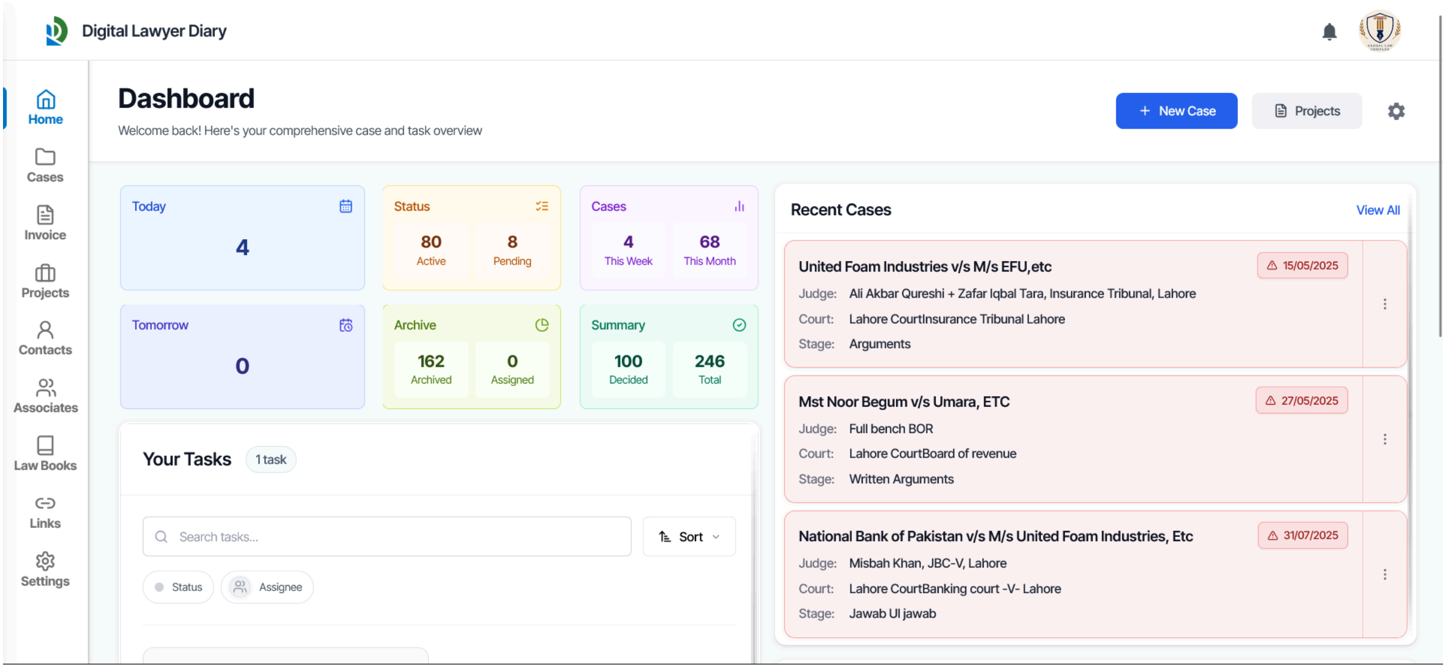
Mobile Guide

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.



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.

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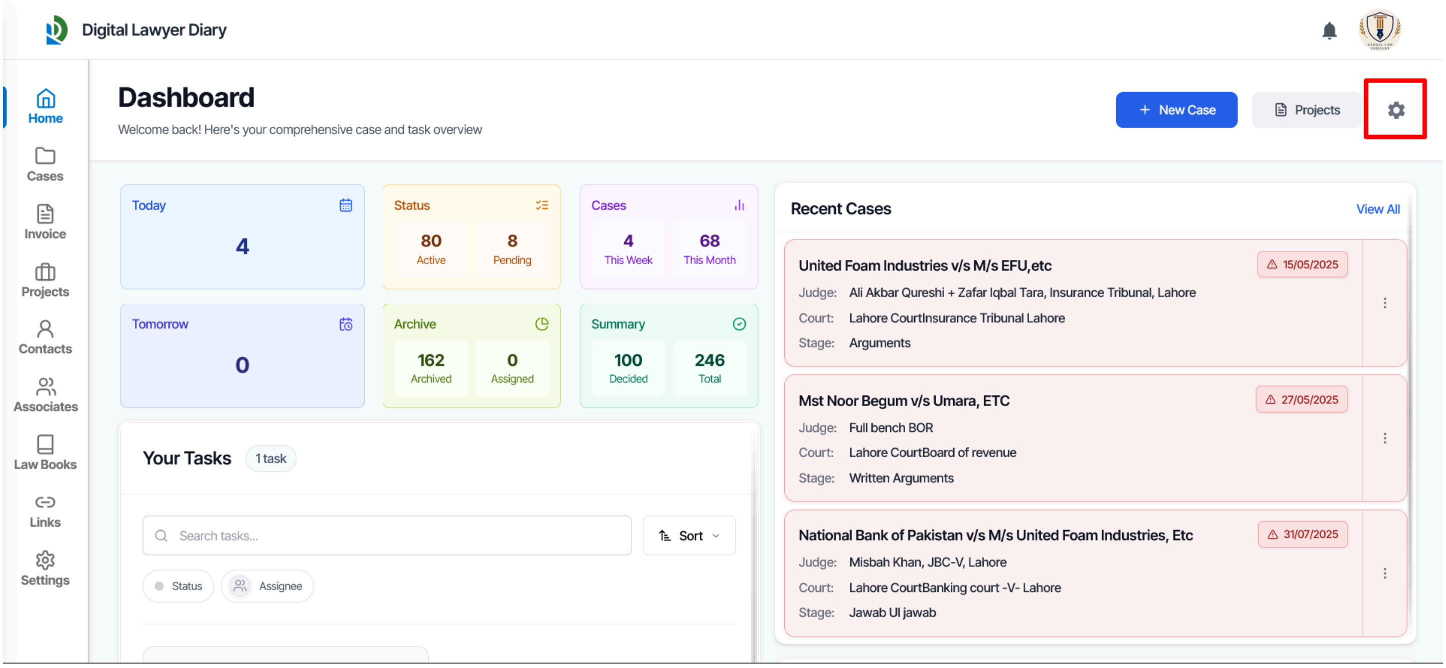
2. Personalizing Your Workspace: Customizing the Dashboard

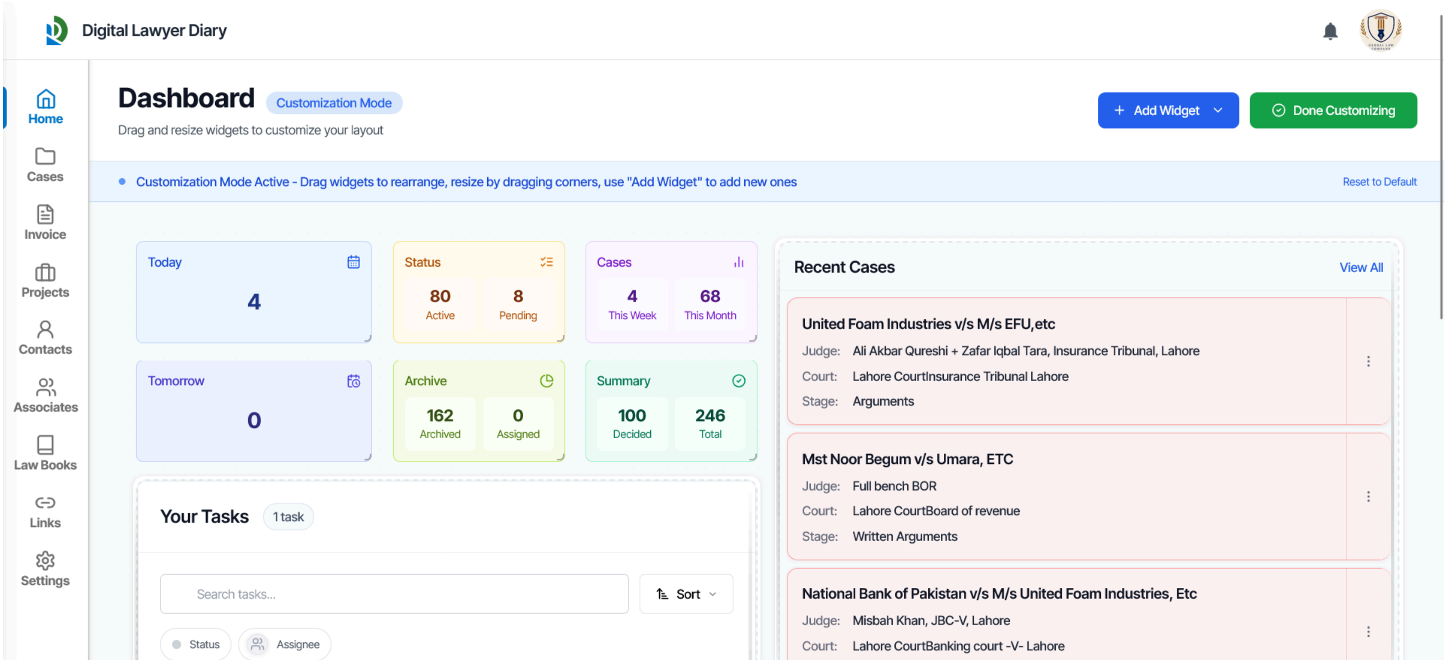
Think of your dashboard as a set of building blocks (widgets). You can move, resize, add, or remove them to prioritize what's most important to you.

Step 1: Enter Customization Mode

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



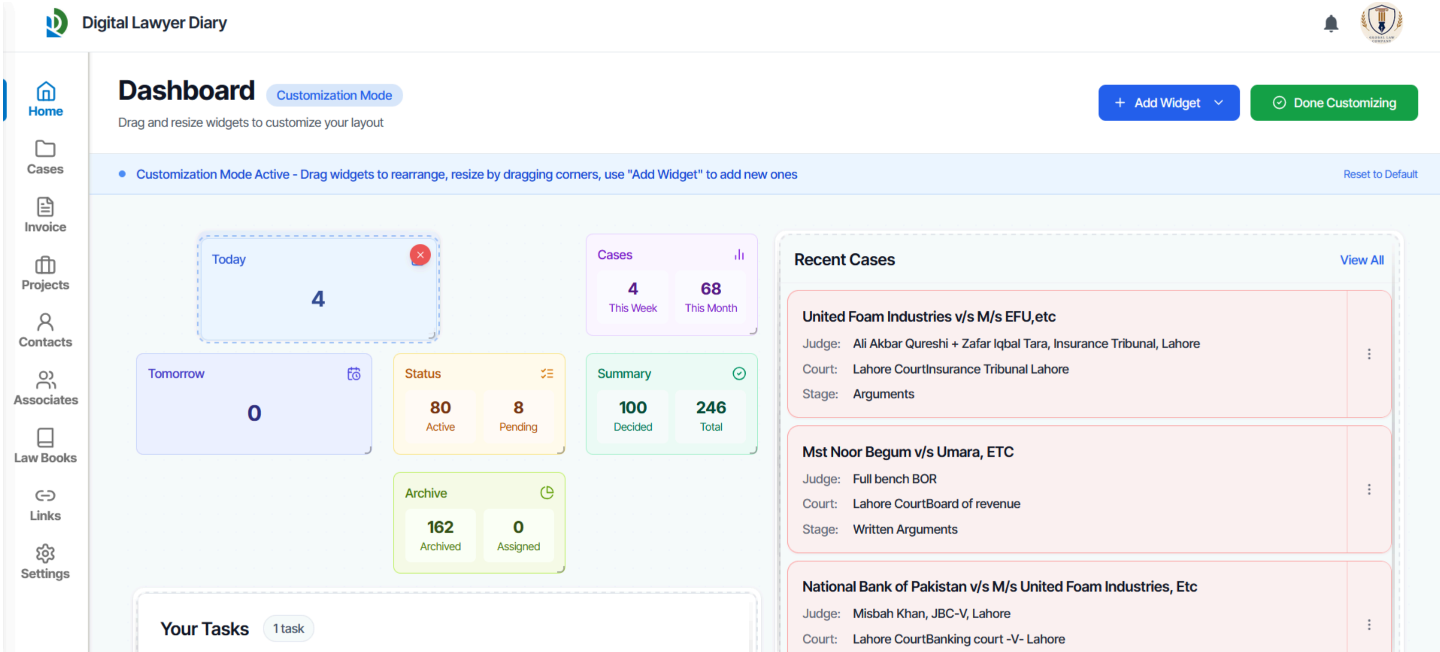
You'll know you're in customization mode when a blue banner appears and your widgets have a dashed border.



Step 2: Rearrange and Resize Widgets

Once in customization mode, you can organize your workspace.

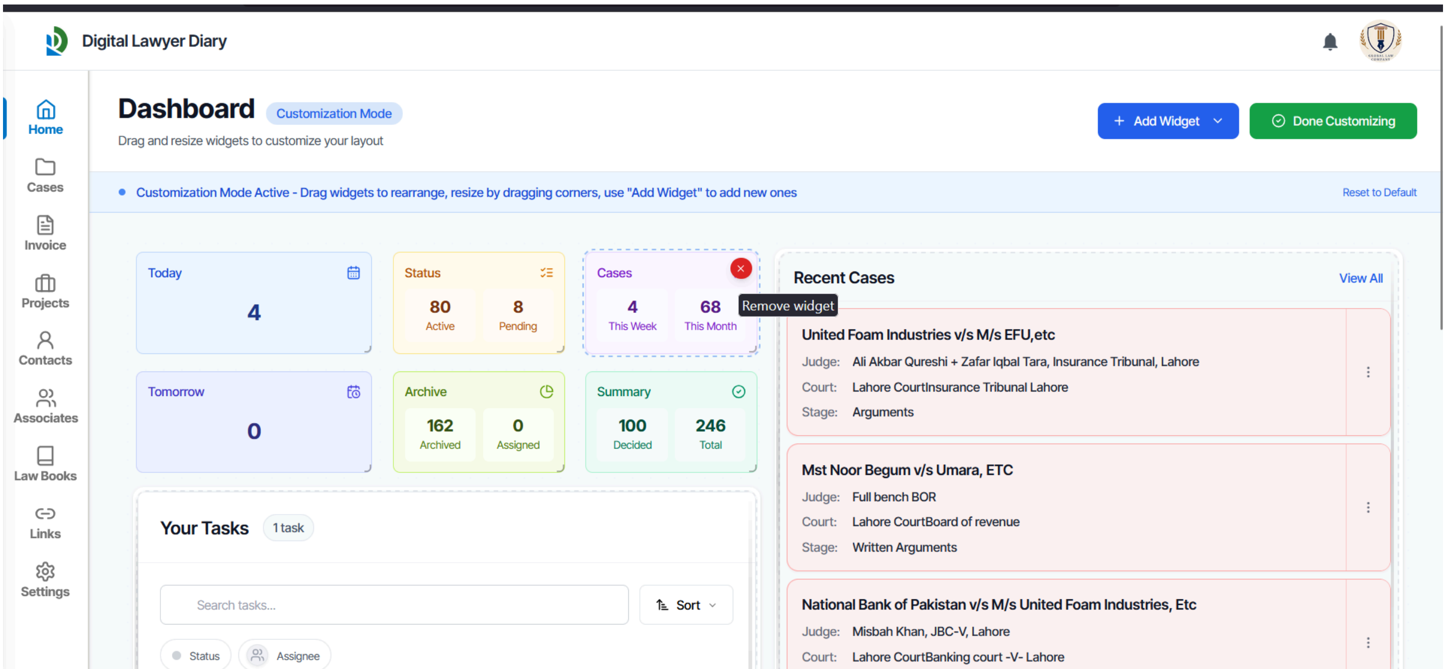
- **To Move a Widget:** Click and hold the widget, drag it to your desired location, and release.
- **To Resize a Widget:** Hover over the bottom-right corner of a widget until your cursor changes, then click and drag to make it larger or smaller.



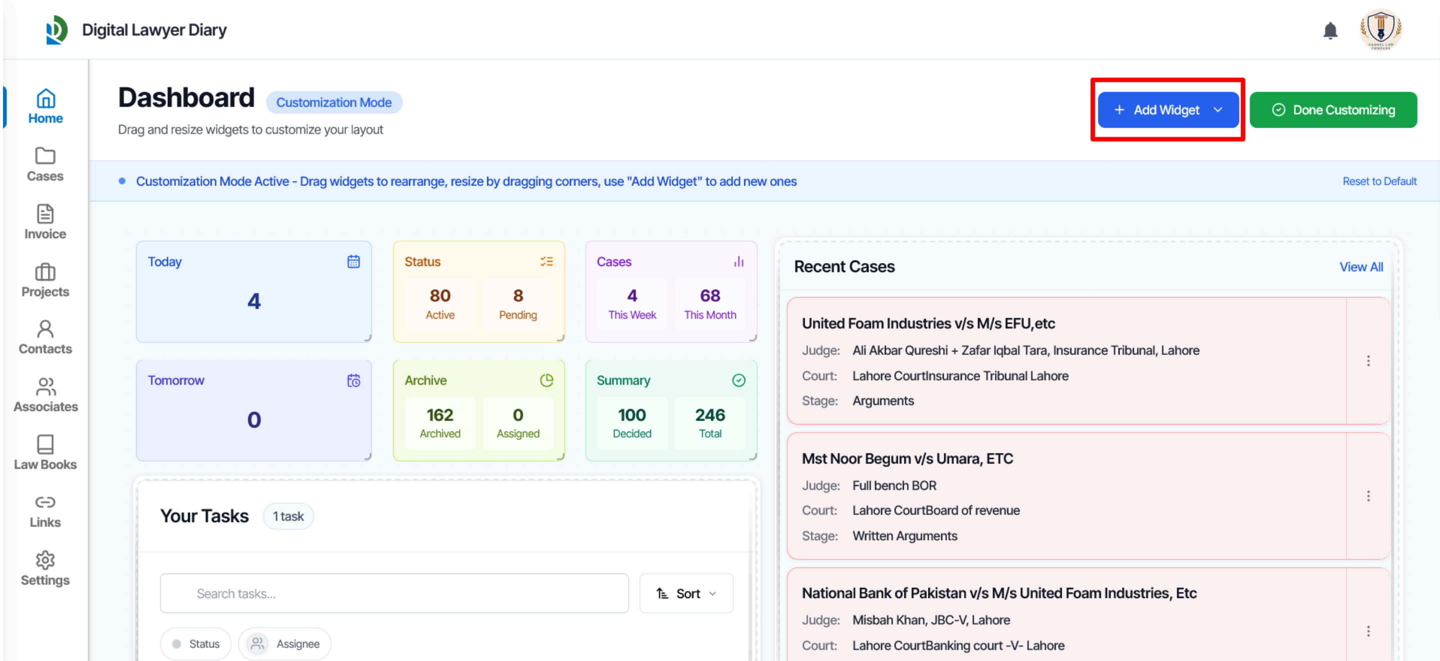
Step 3: Add and Remove Widgets

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

- **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.

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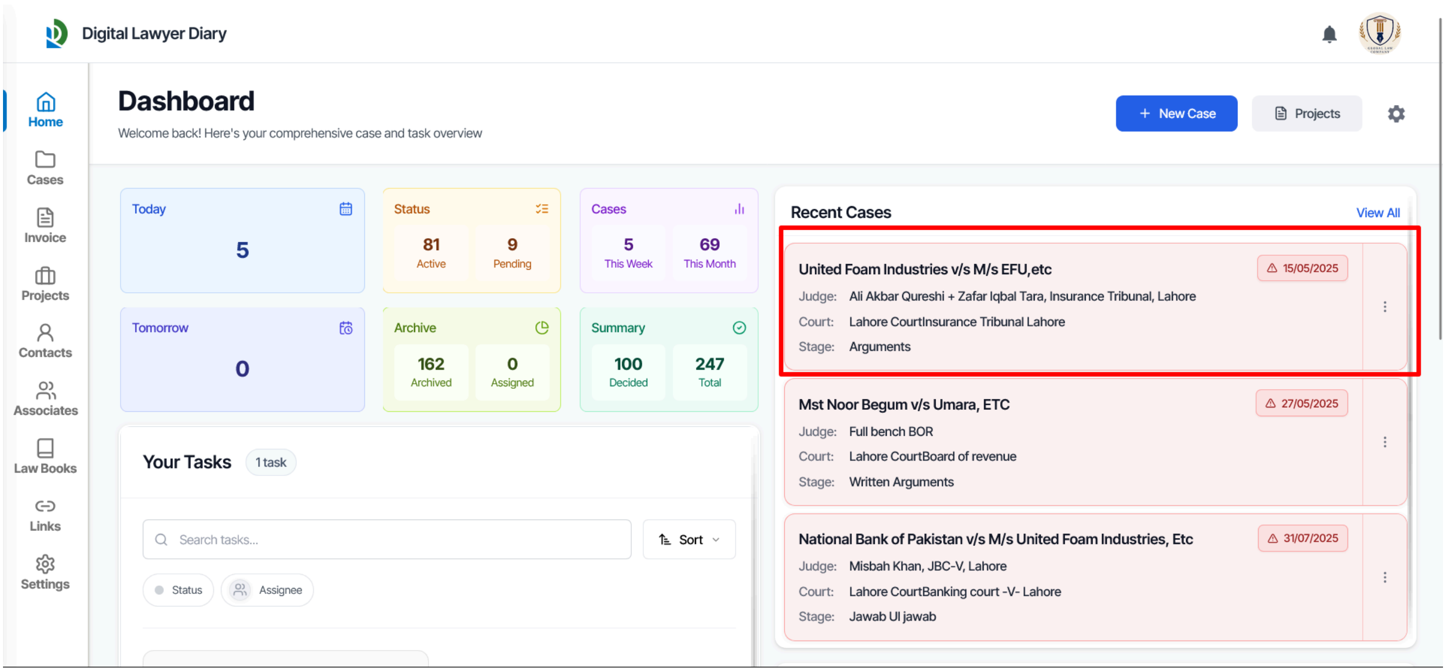
3. Quick Navigation: Accessing Case Details

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.



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

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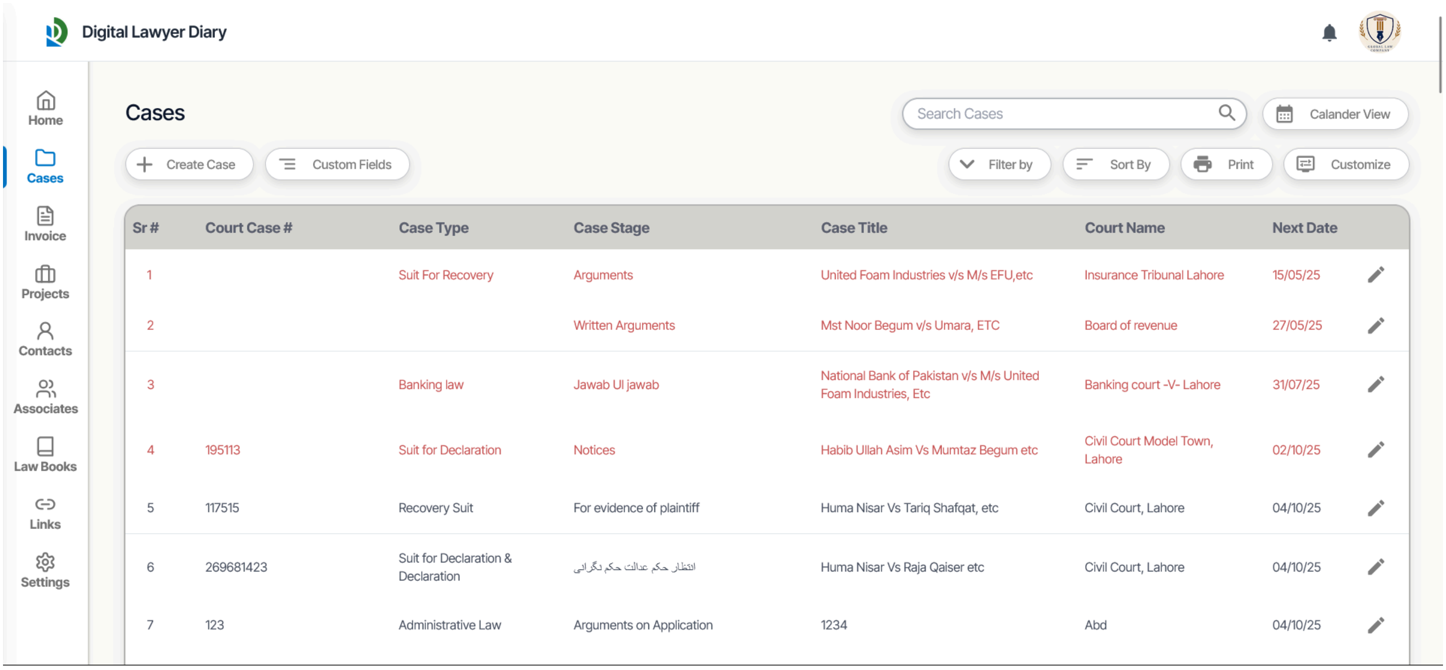
4. Case Management: The Heart of Your Practice

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.



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	

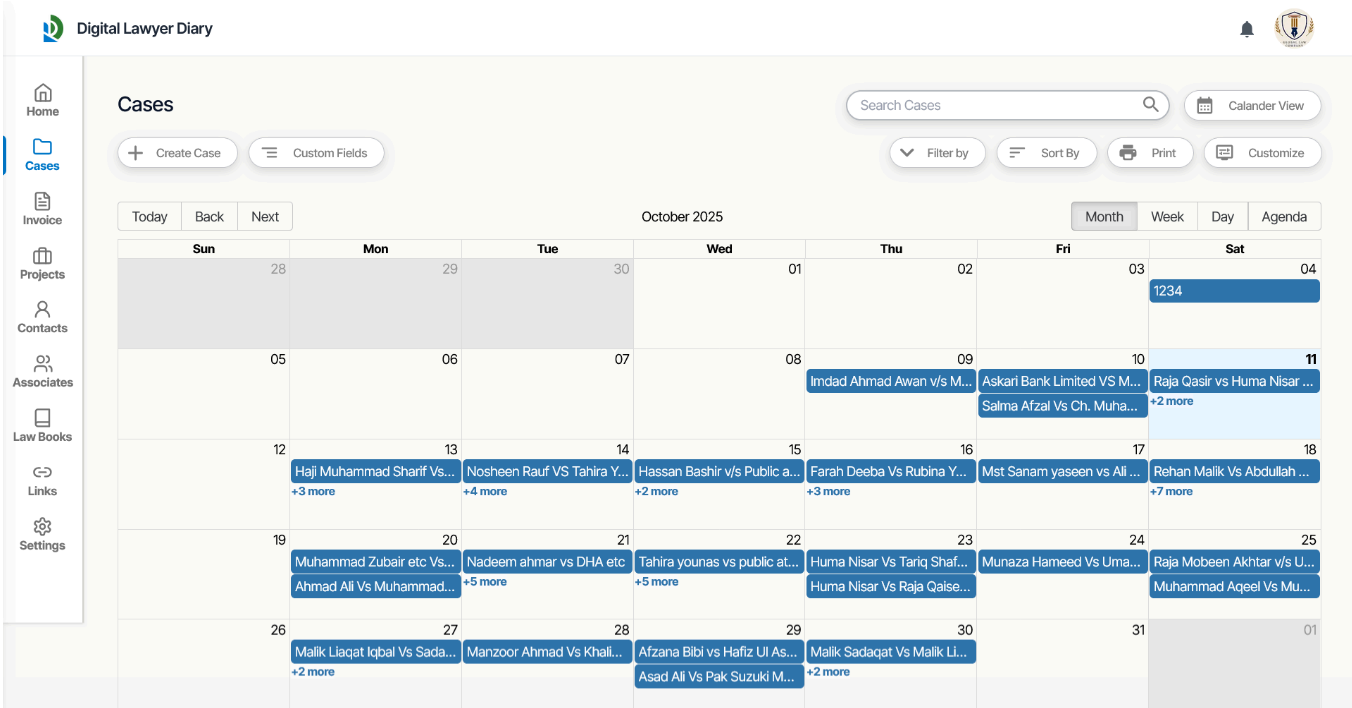
02-10-25

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

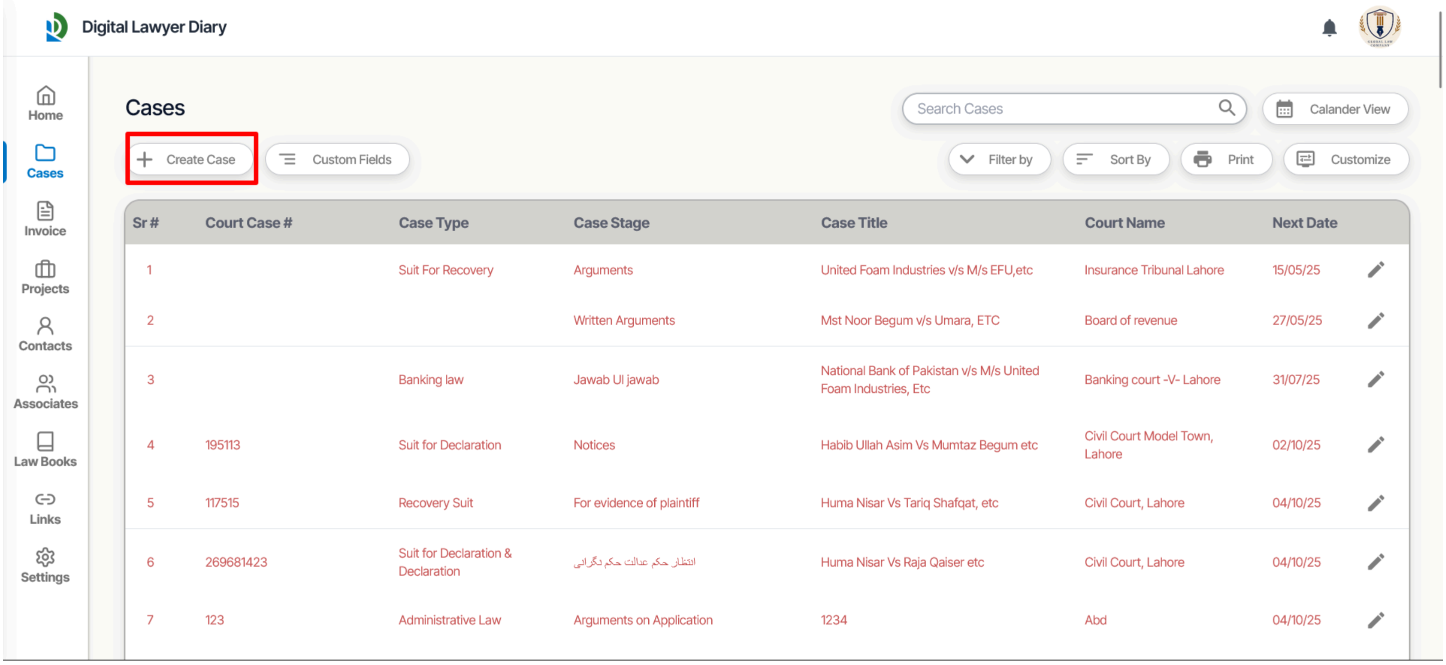
- **Customize:** Click the **Customize** button to choose which columns are visible in your table, allowing you to see only the information that matters most.
- **Calendar View:** Click the **Calendar View** icon to see your cases plotted on a monthly calendar based on their "Next Date."



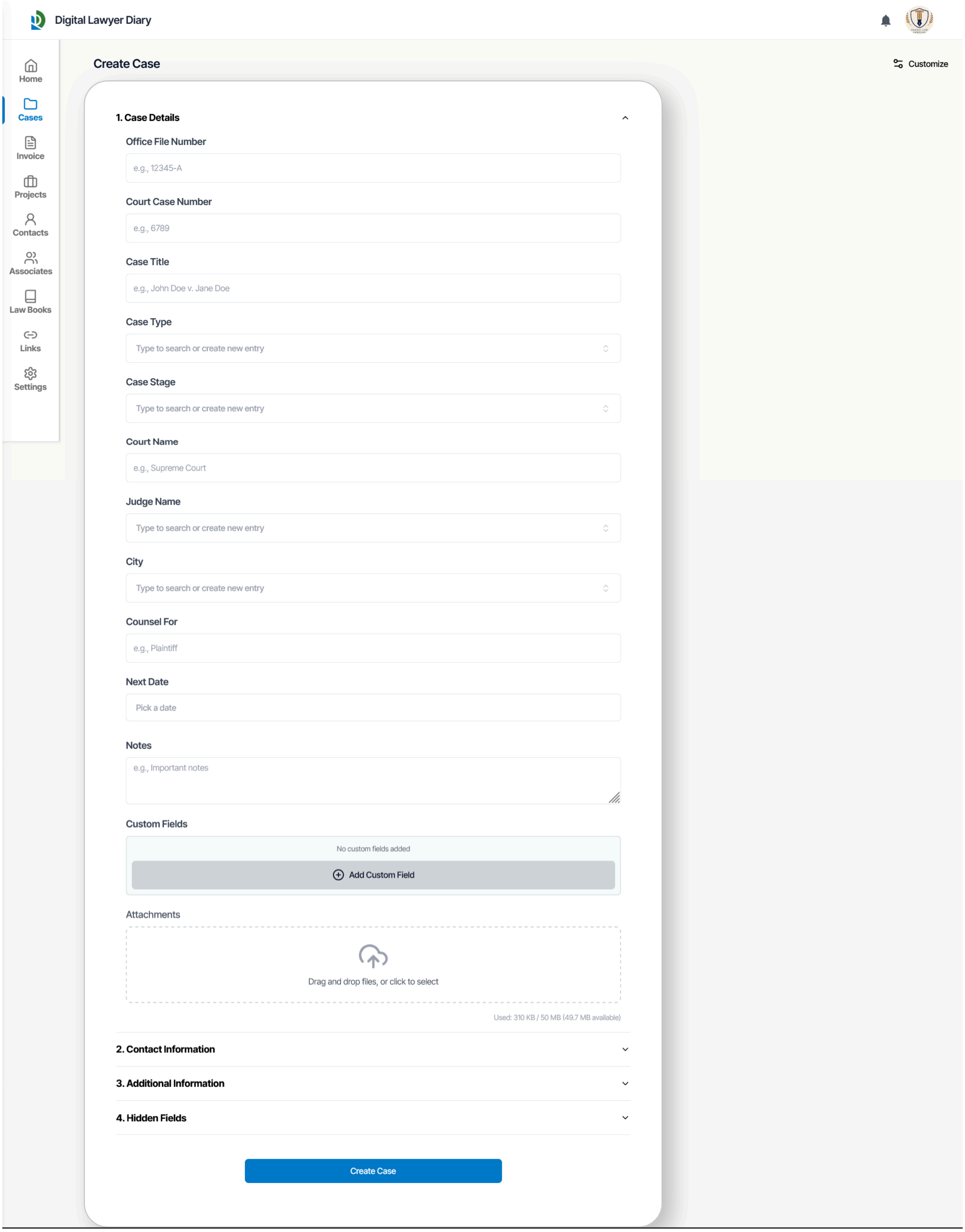
4.2 Creating a New Case

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**.

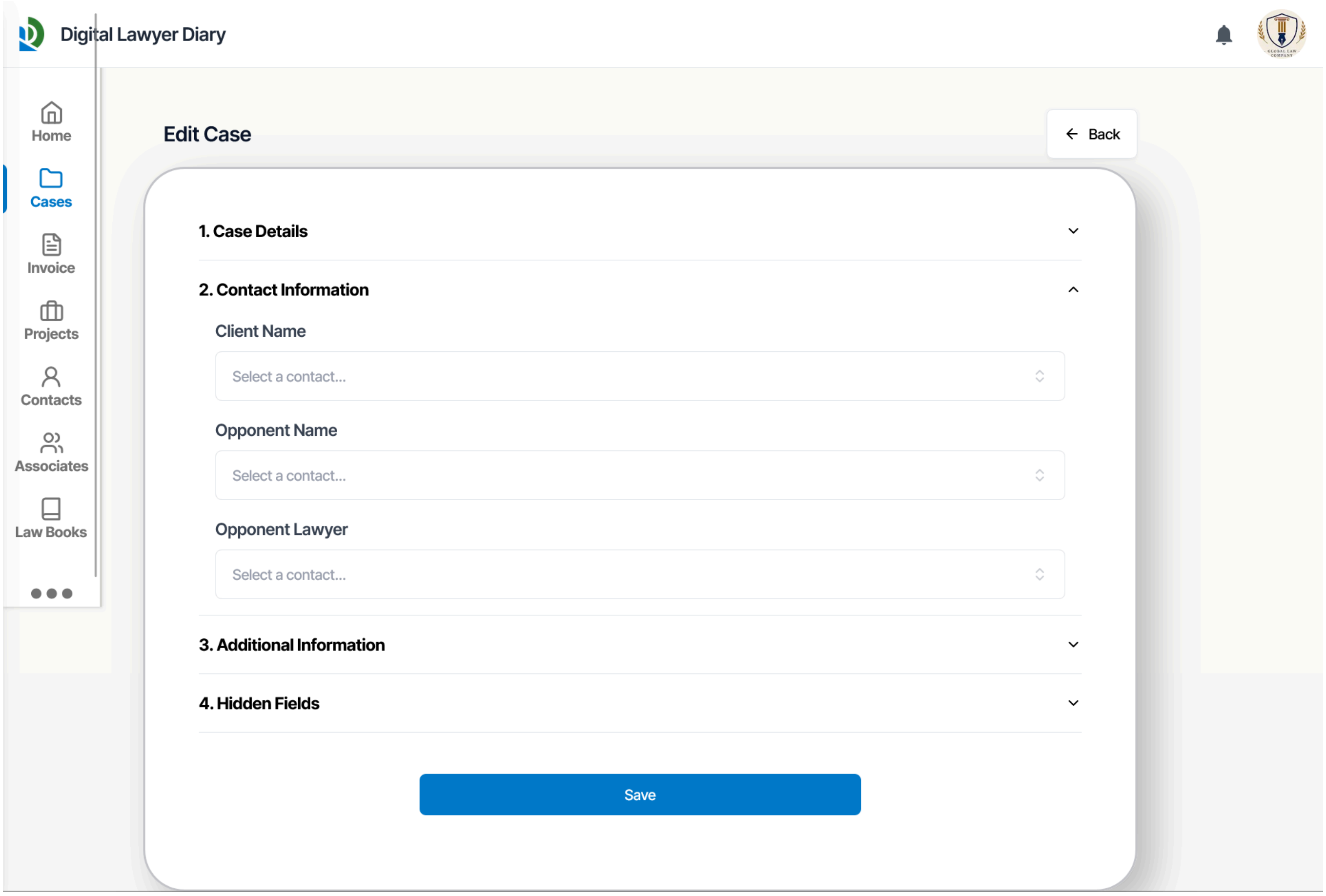
Step 1: From the Cases list view, click the **"+ Create Case"** button.



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



- **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.



- **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.

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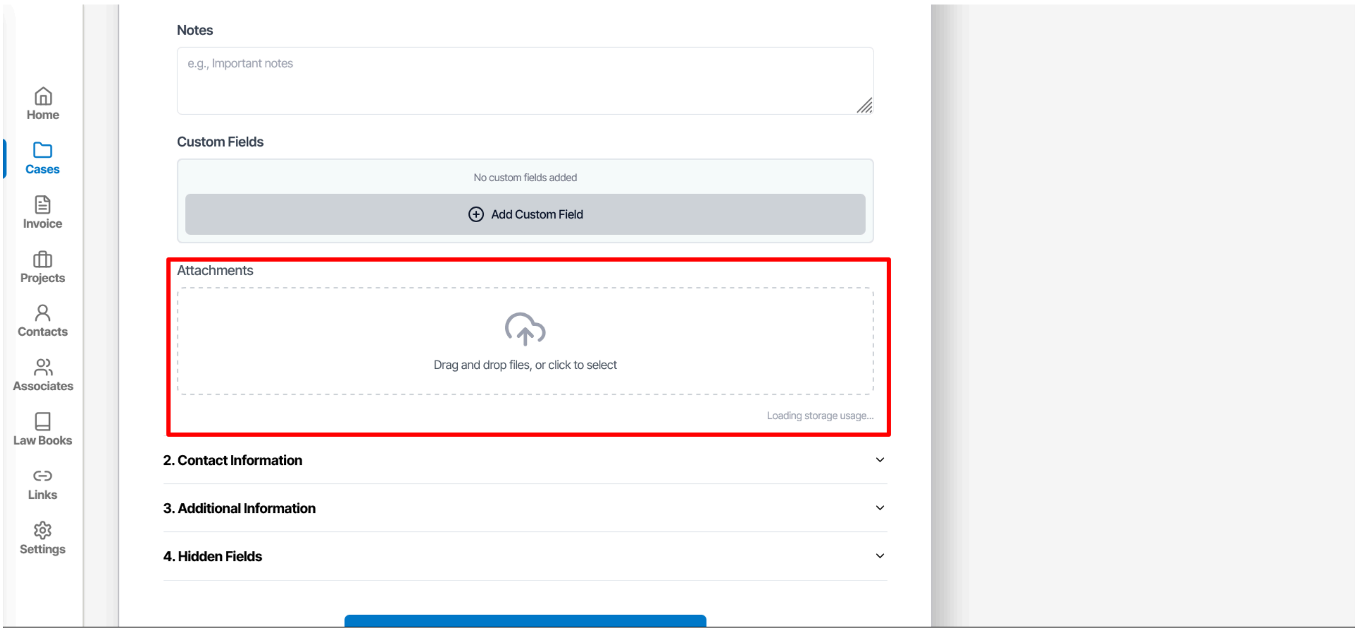
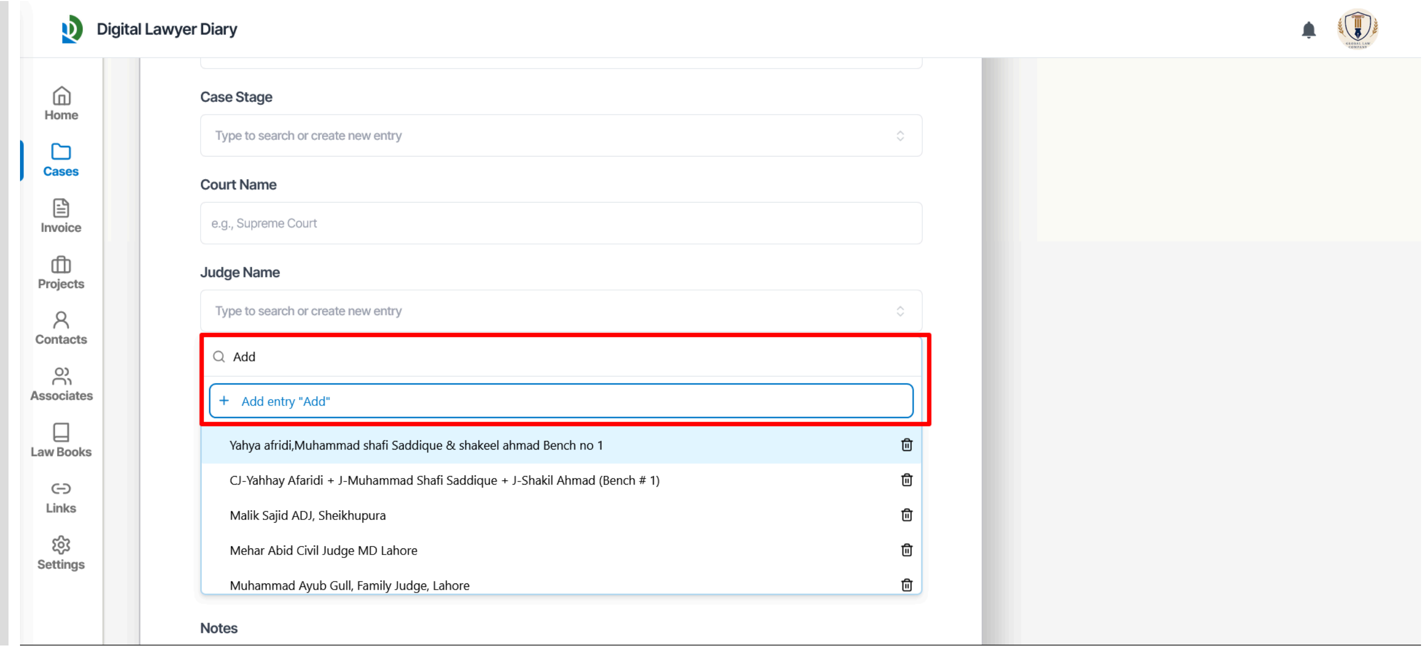
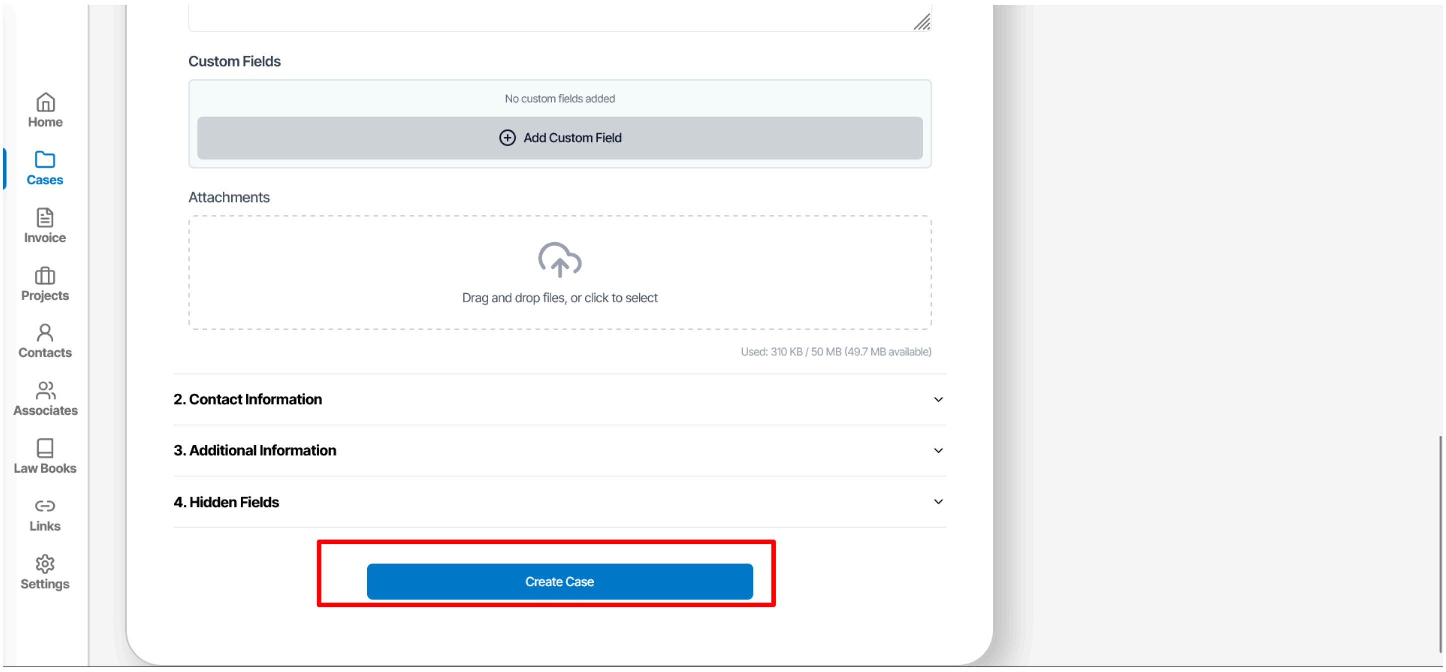
- **Attachments:** Drag and drop files directly into the upload area or click to select them from your computer. This is perfect for storing petitions, orders, and other relevant documents. (**50 MB Limit Per Account**) with more option for Enterprise accounts



> ✨ ***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!*



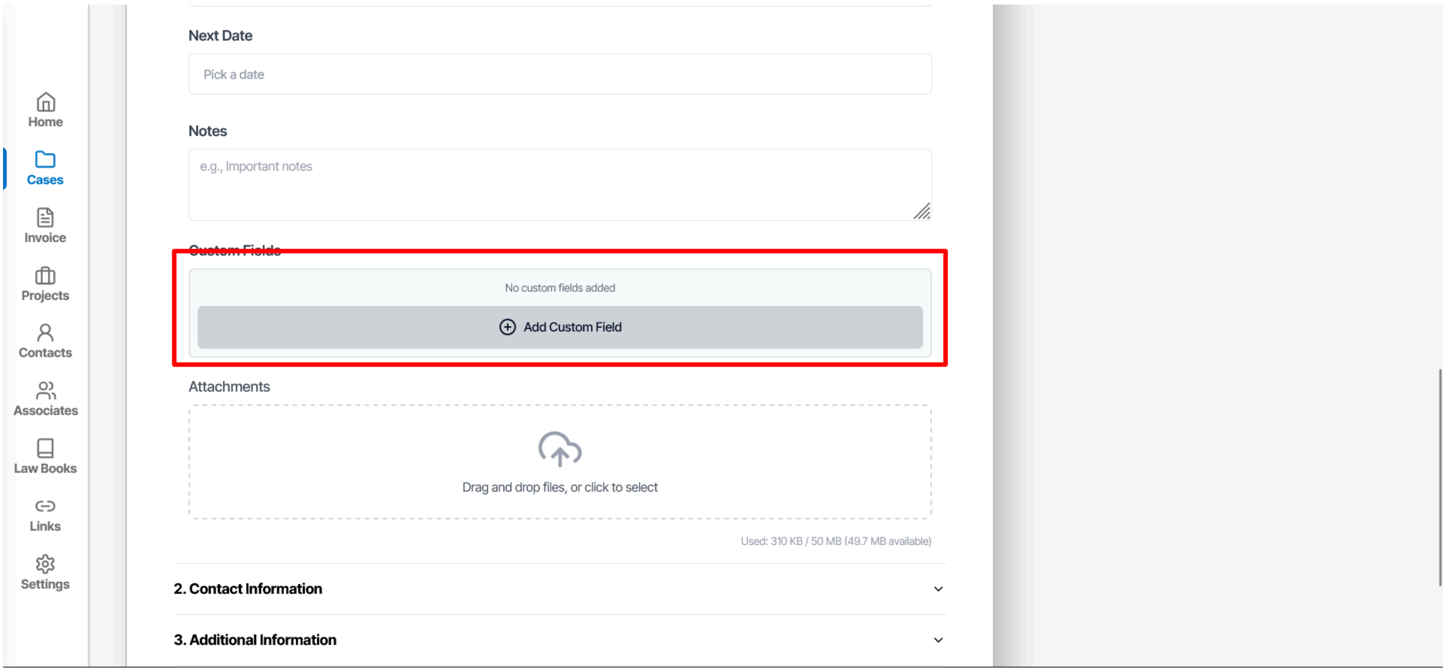
Step 3: Once all the information is entered, click the blue **"Create Case"** button at the bottom. You will be taken directly to the new case's "Case View" page.

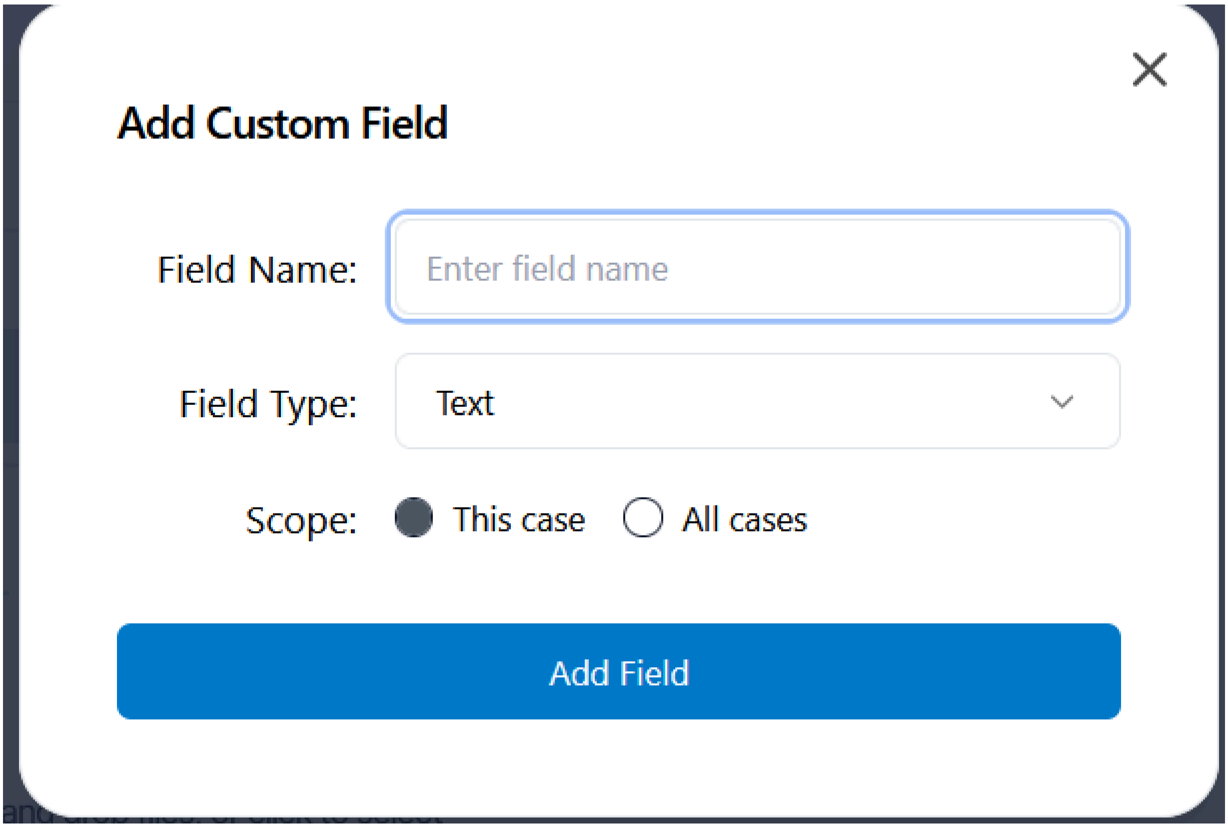


Customizing the "Create Case" Form

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

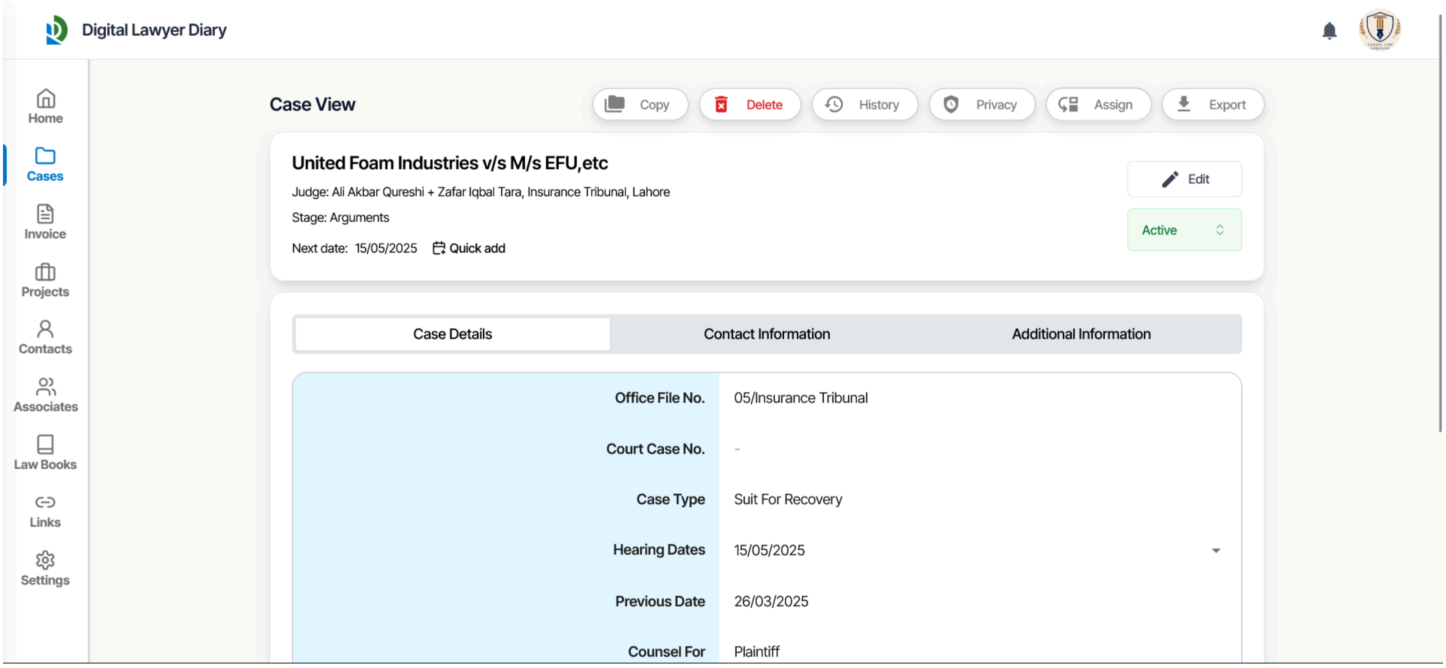
- **While on the "Create Case" page, click the Customize icon in the top-right corner.**
- **A "Customize Form" modal will appear. Uncheck any fields you don't need.**
- **Click "Save changes". The form will now be streamlined to your preference.**





4.3 The Case View Page: Your Digital Case File

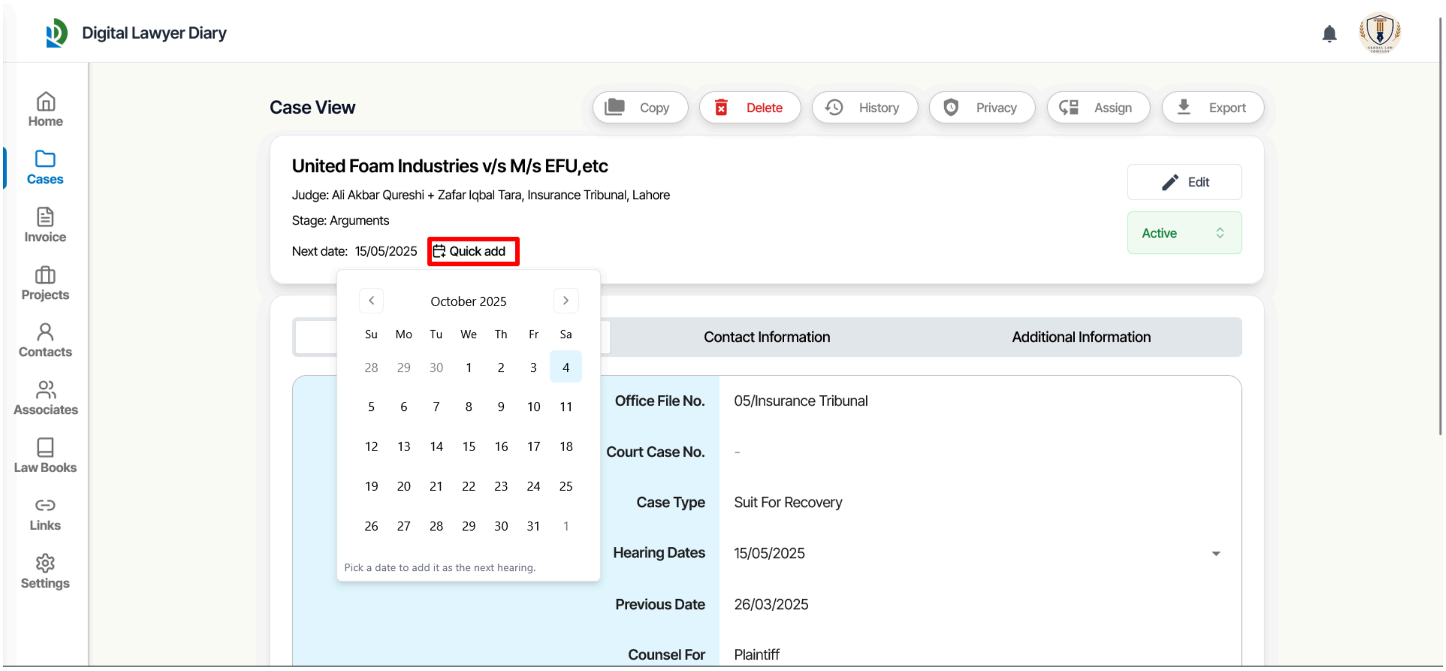
After creating or clicking on an existing case, you'll land on the **Case View** page. This is the detailed file for a single case, containing all its information in one place.



Managing Hearing Dates

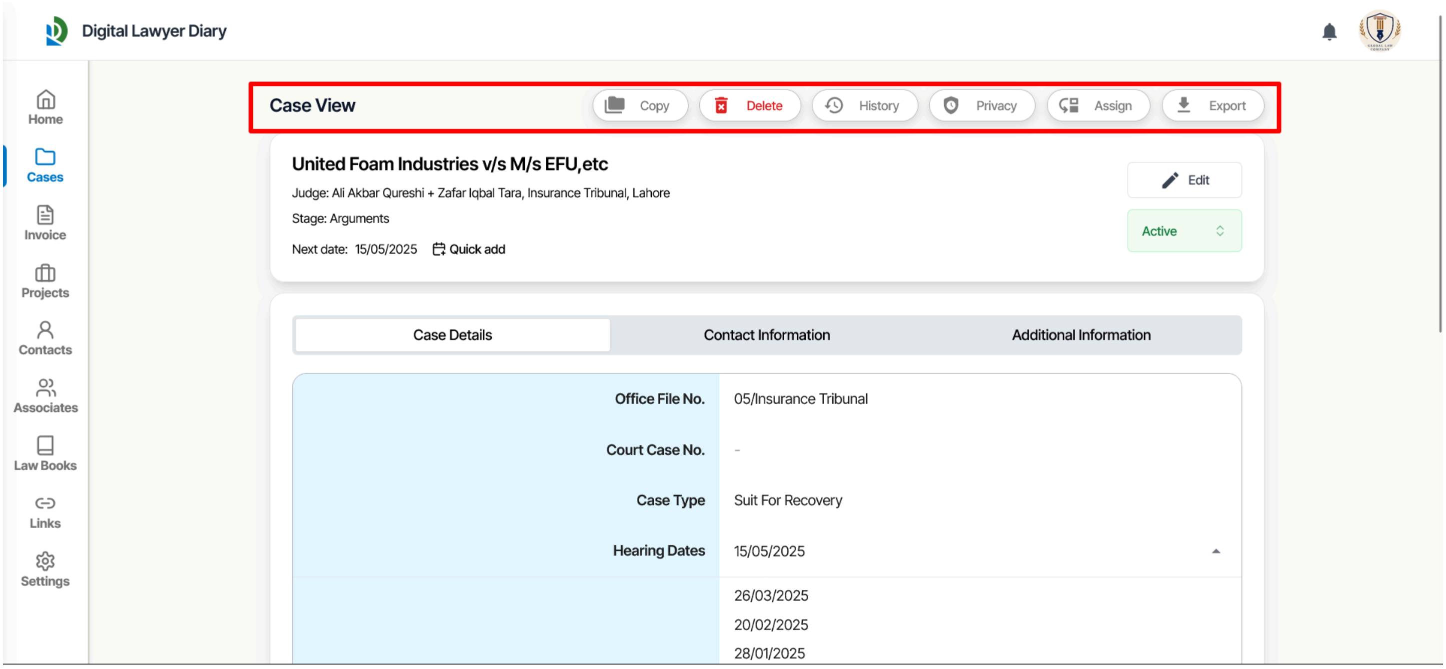
Keeping track of hearing dates is critical. Your Digital Diary makes this effortless.

- **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.



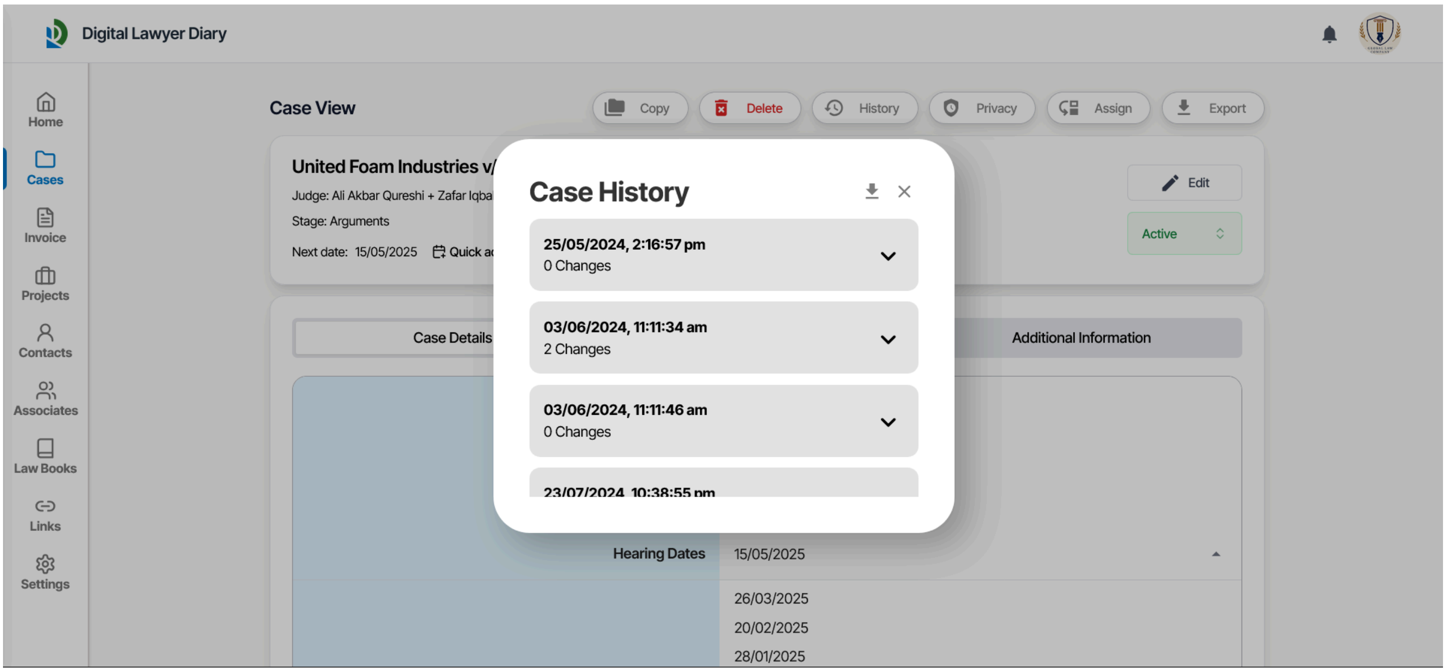
The Case Actions Bar

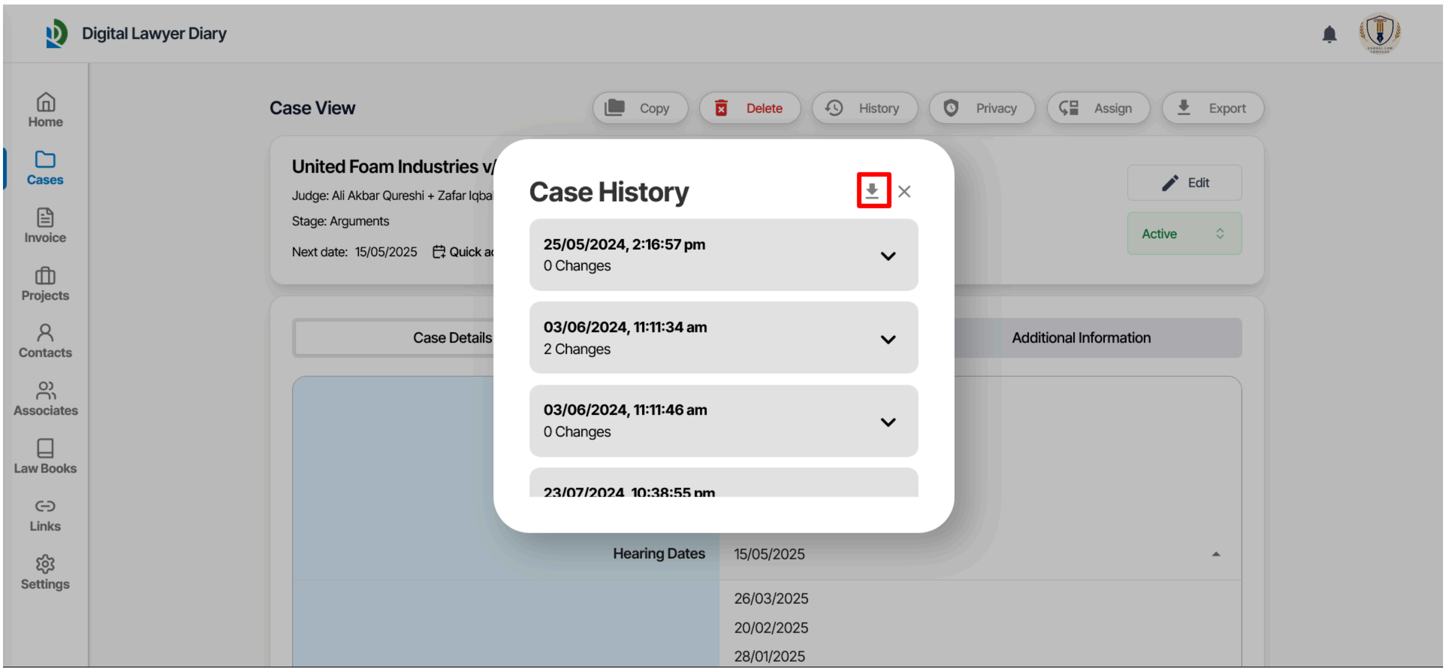
At the top of the Case View page is a powerful action bar that lets you manage every aspect of the case.



- **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.*





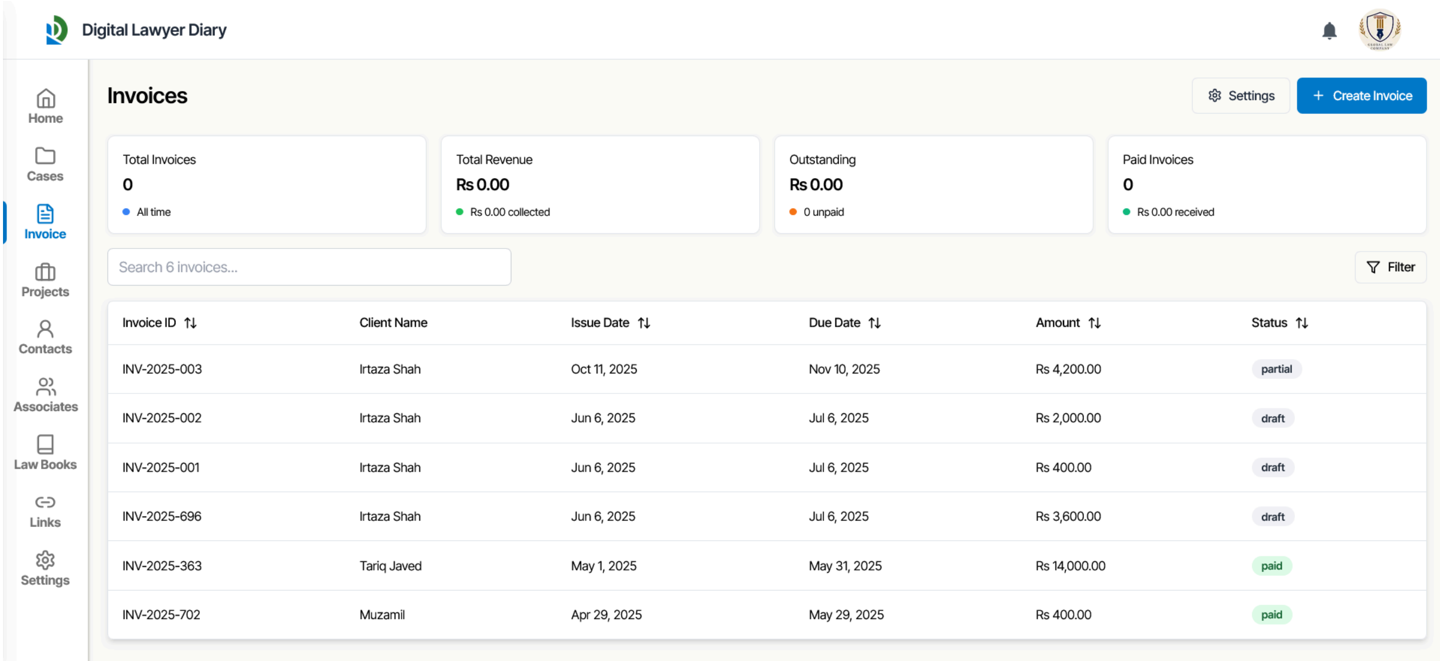
5. Invoice Management: From Billing to Paid

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.

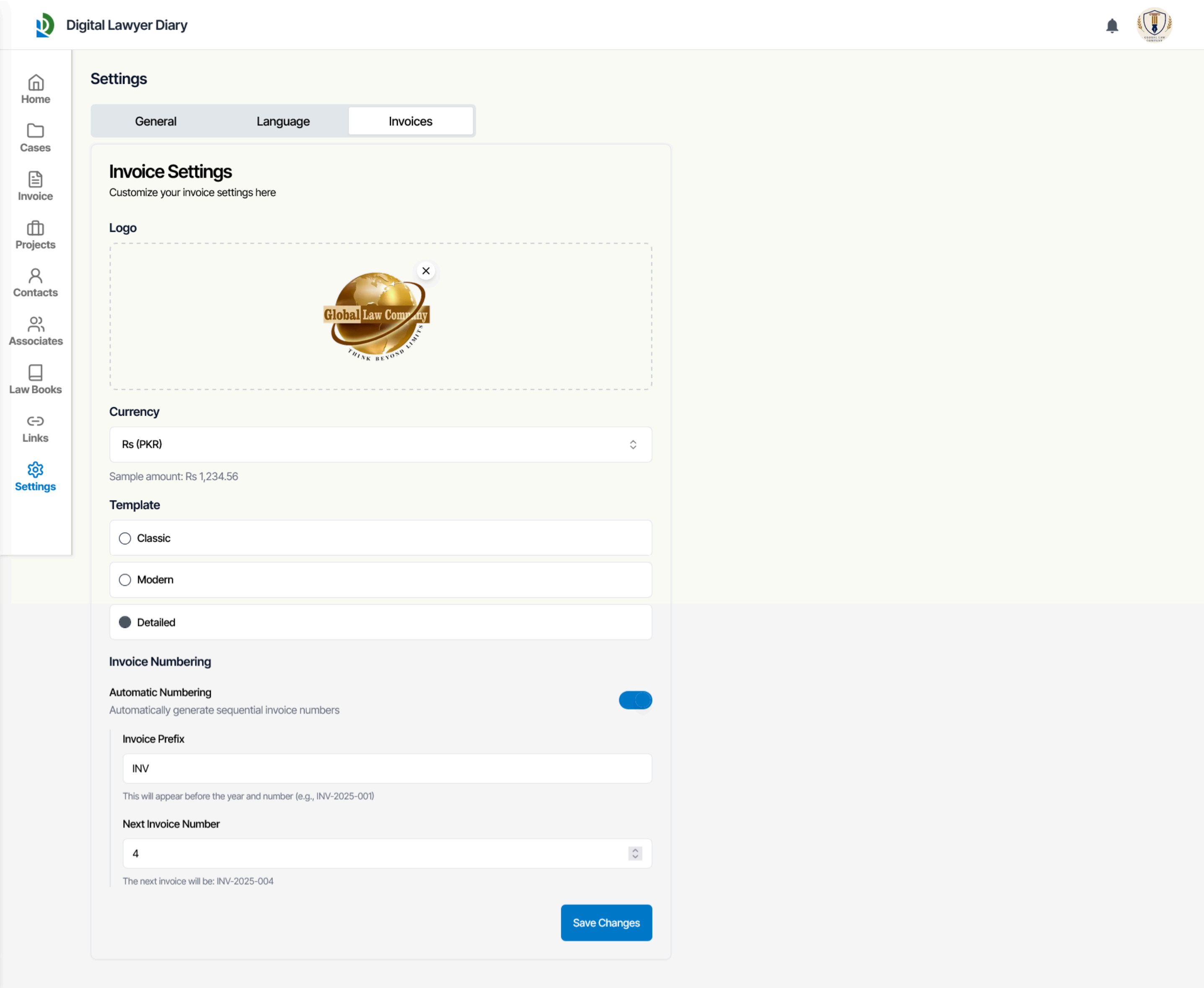


- **Financial Summary:** At the top, you'll find key metrics:
  - **Total Invoices:** A count of all invoices ever created.
  - **Total Revenue:** The total value of all invoices.
  - **Outstanding:** The total amount of money that is yet to be paid across all unpaid invoices.
  - **Paid Invoices:** 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.



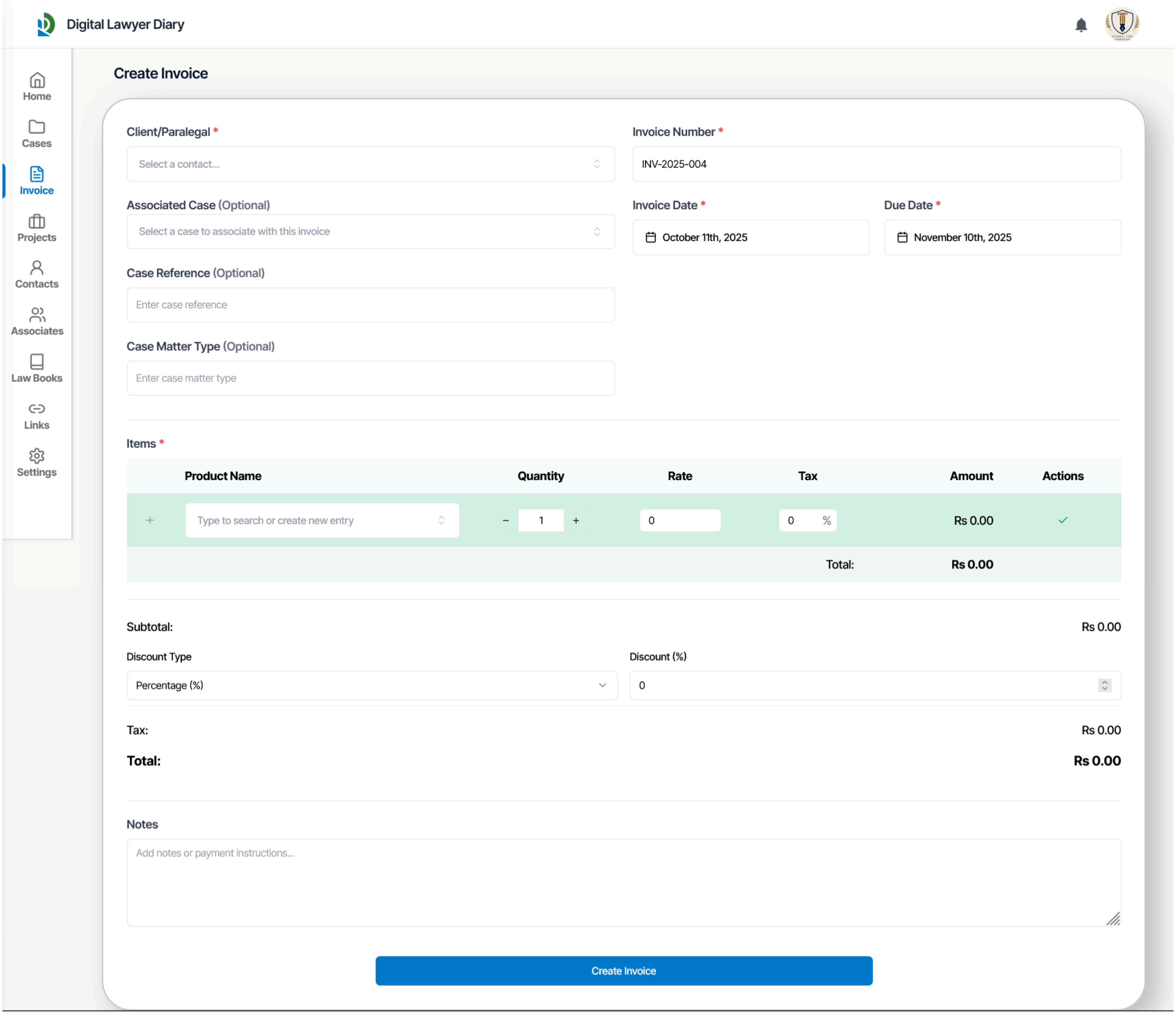
Step 2: Customize your invoice settings:

- **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

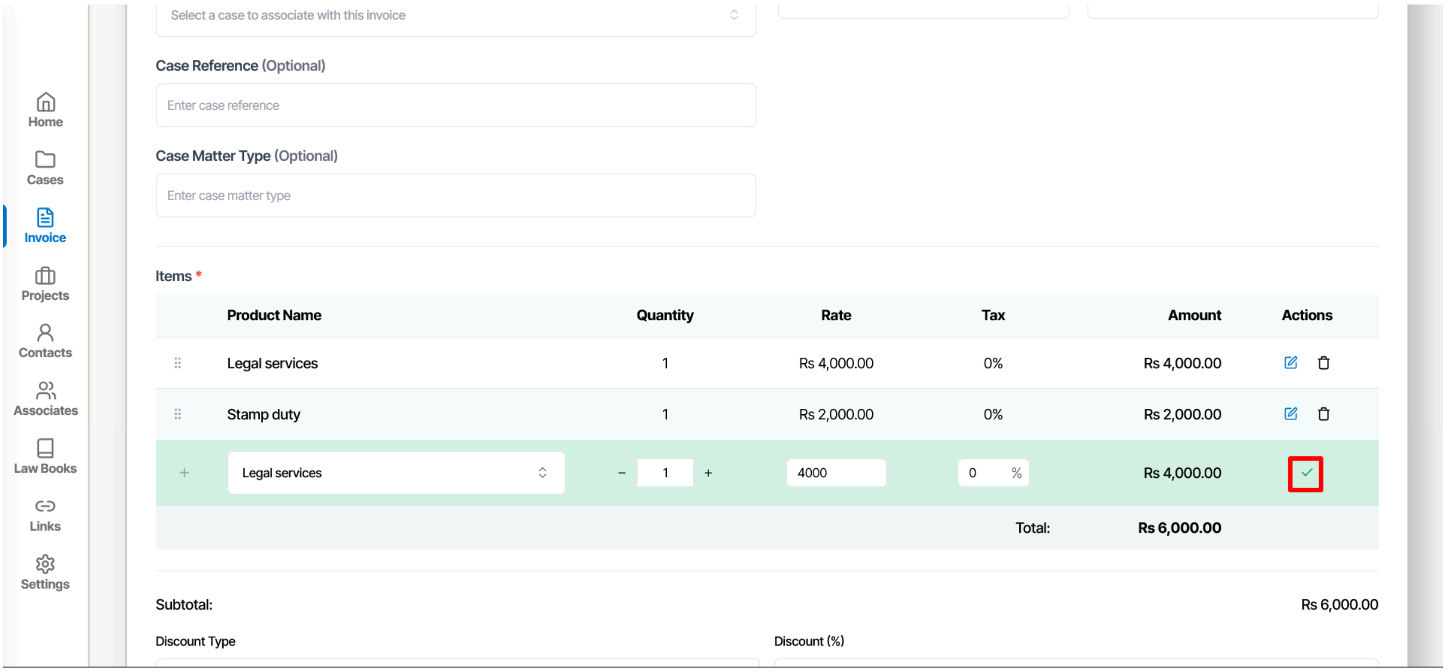
Step 1: From the Invoice Dashboard, click the **"+ Create Invoice"** button.

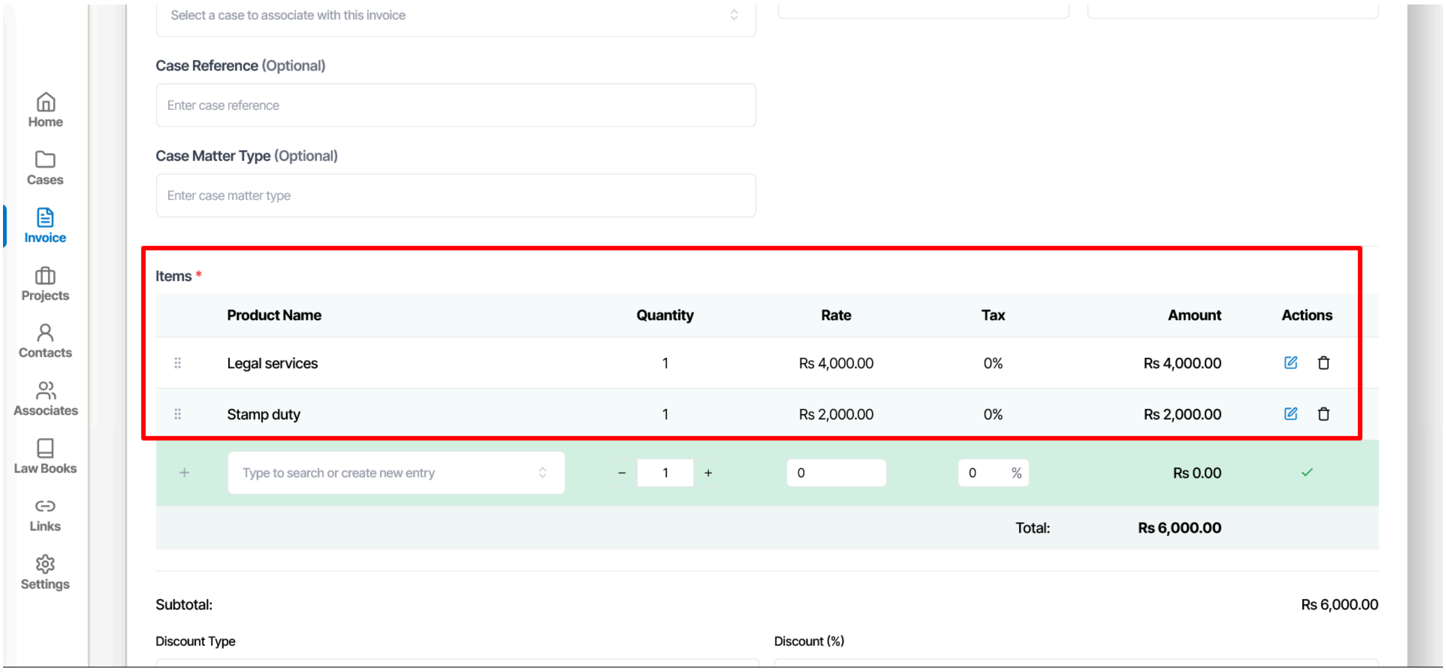


Step 2: Fill in the Core Details

- **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.

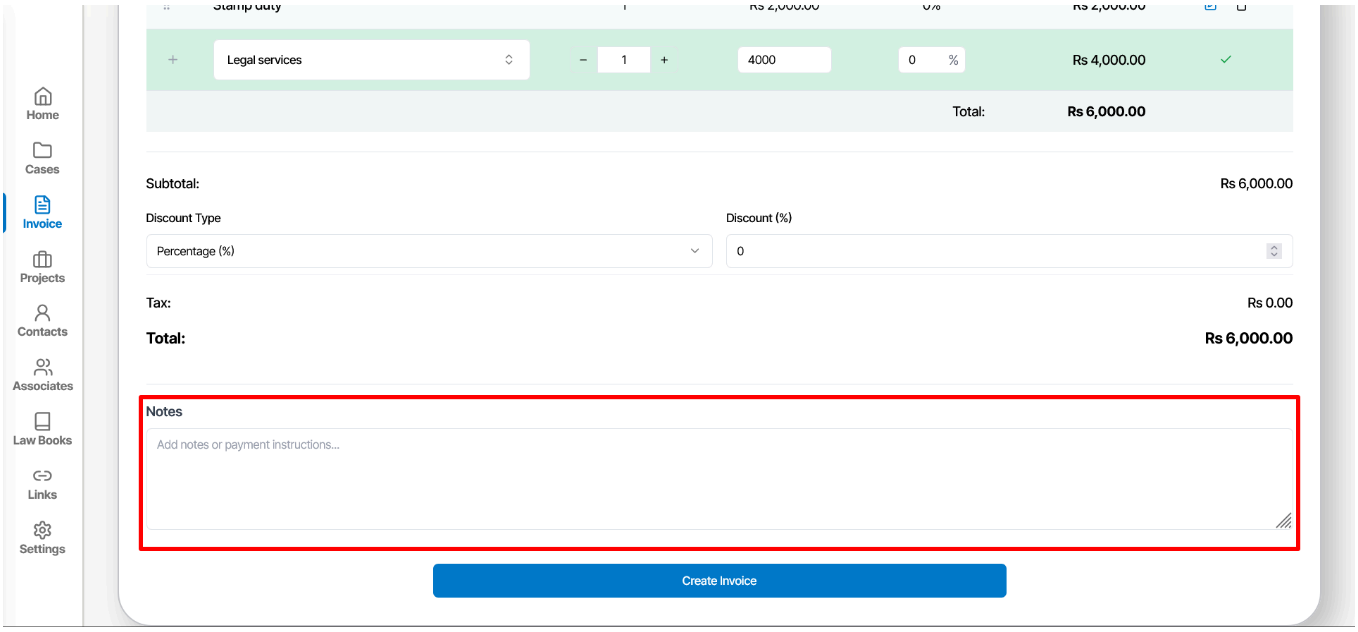




- In the **Product Name** field, select a service from your saved list (e.g., "Legal services") or type a new one and click **"+ Add entry '**New Service**'" to save it for future use.
- Enter the **Quantity** (e.g., hours) and the **Rate**. The system automatically calculates the Amount.
- Add applicable **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**.

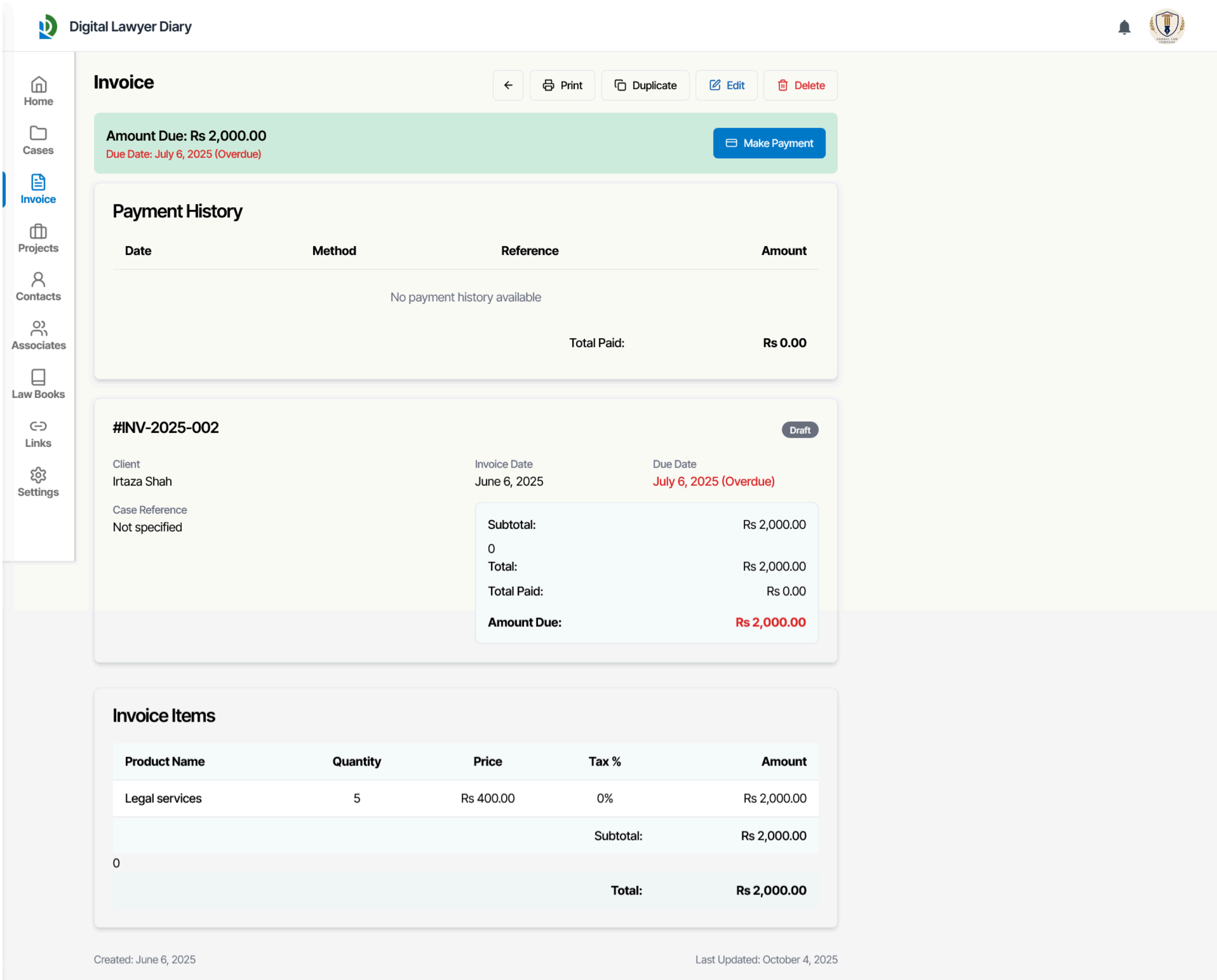
Step 4: Add Notes and Finalize

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



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.



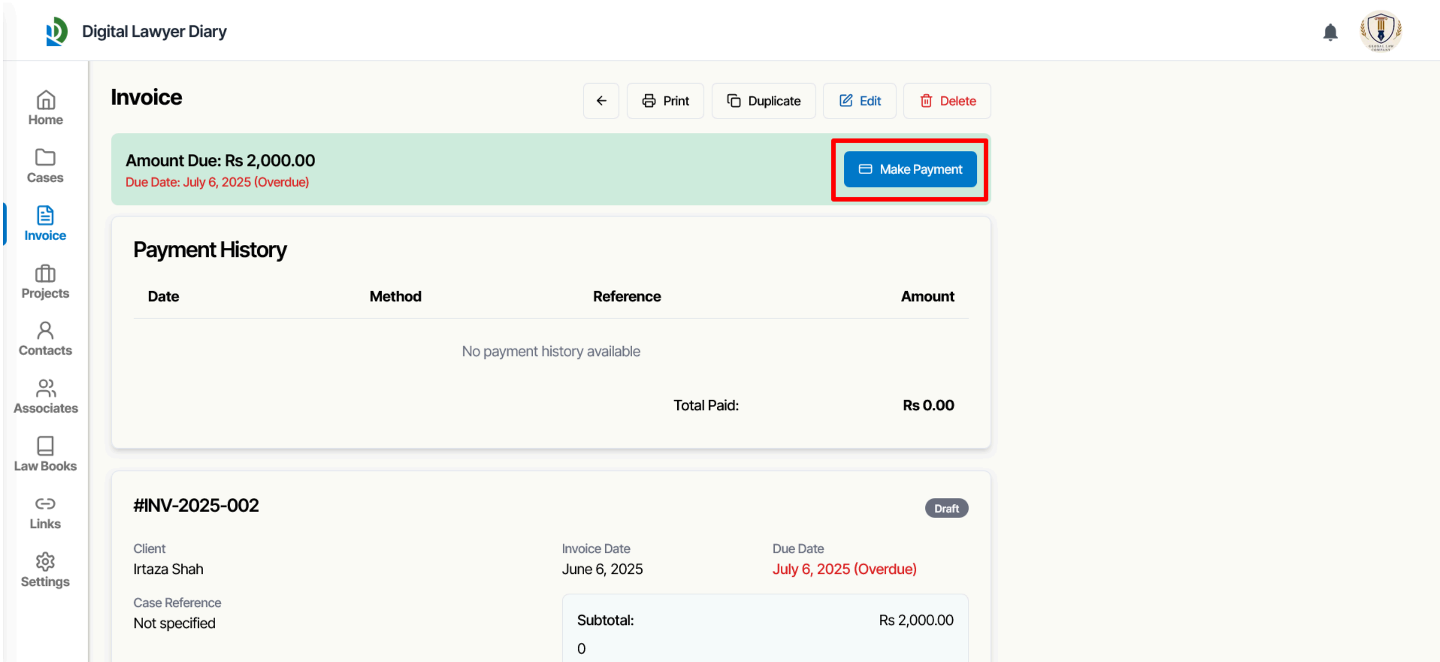
Key Features:

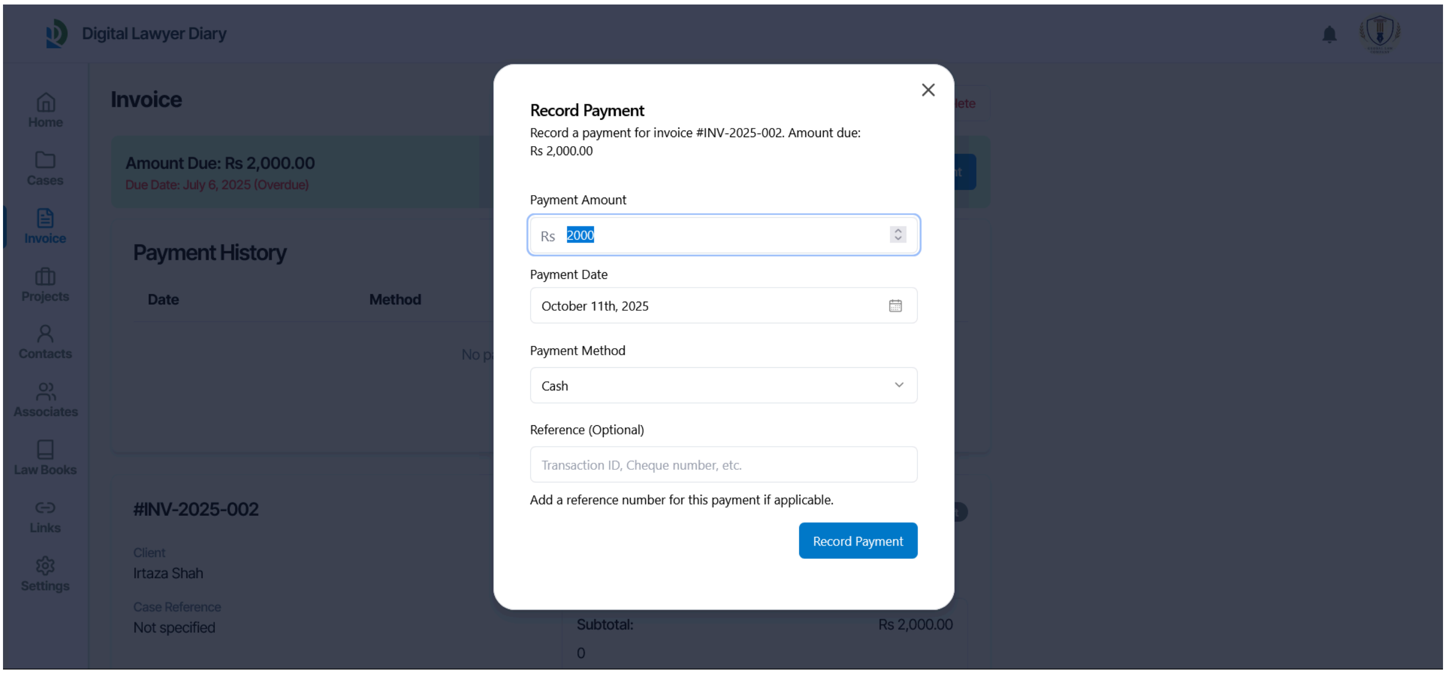
- **Status Banner:** A prominent banner at the top shows the **Amount Due** and the due date. Its color indicates if it's current, due soon, or overdue.

- **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.



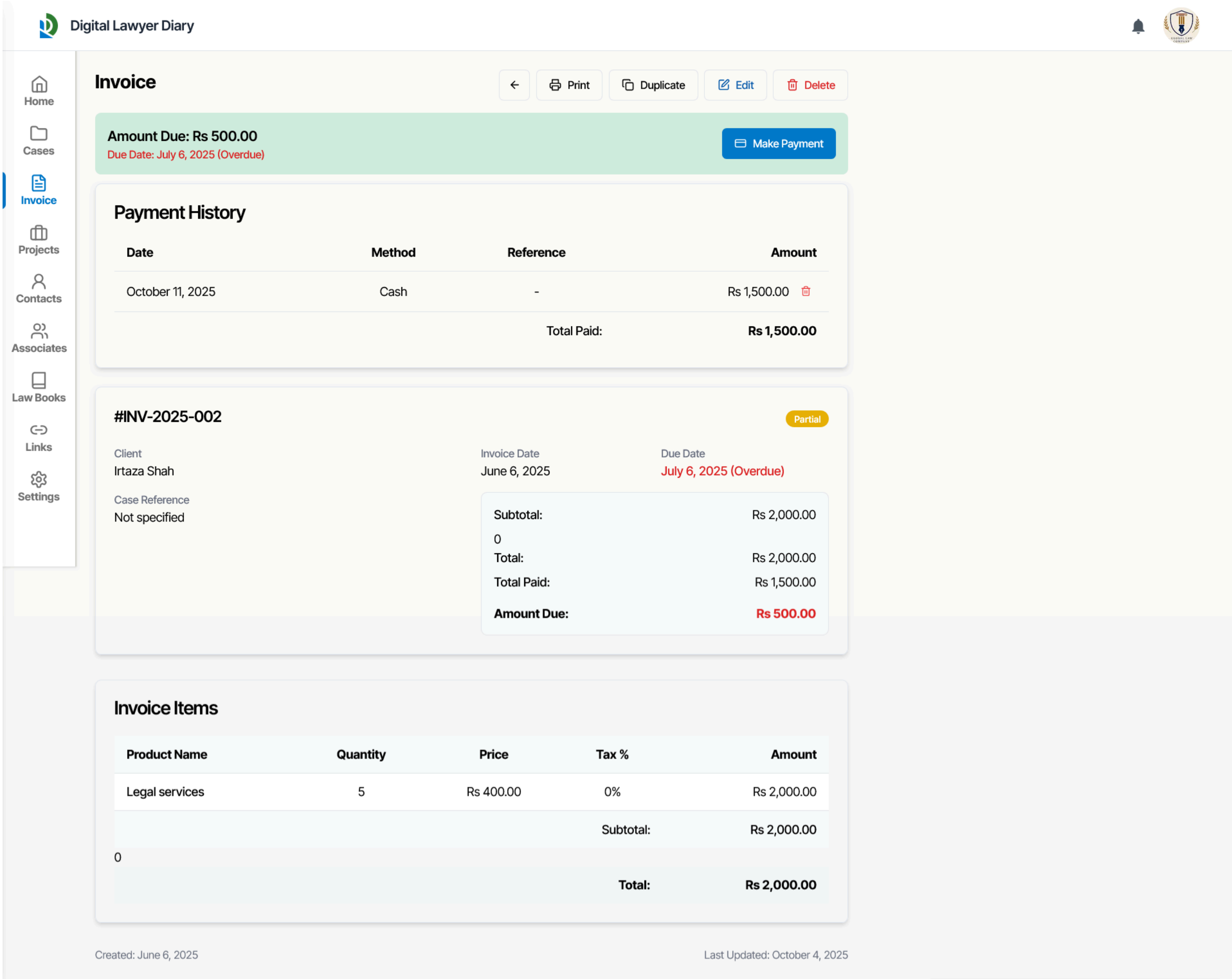


Step 2: In the "Record Payment" pop-up:

- 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).



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

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

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

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

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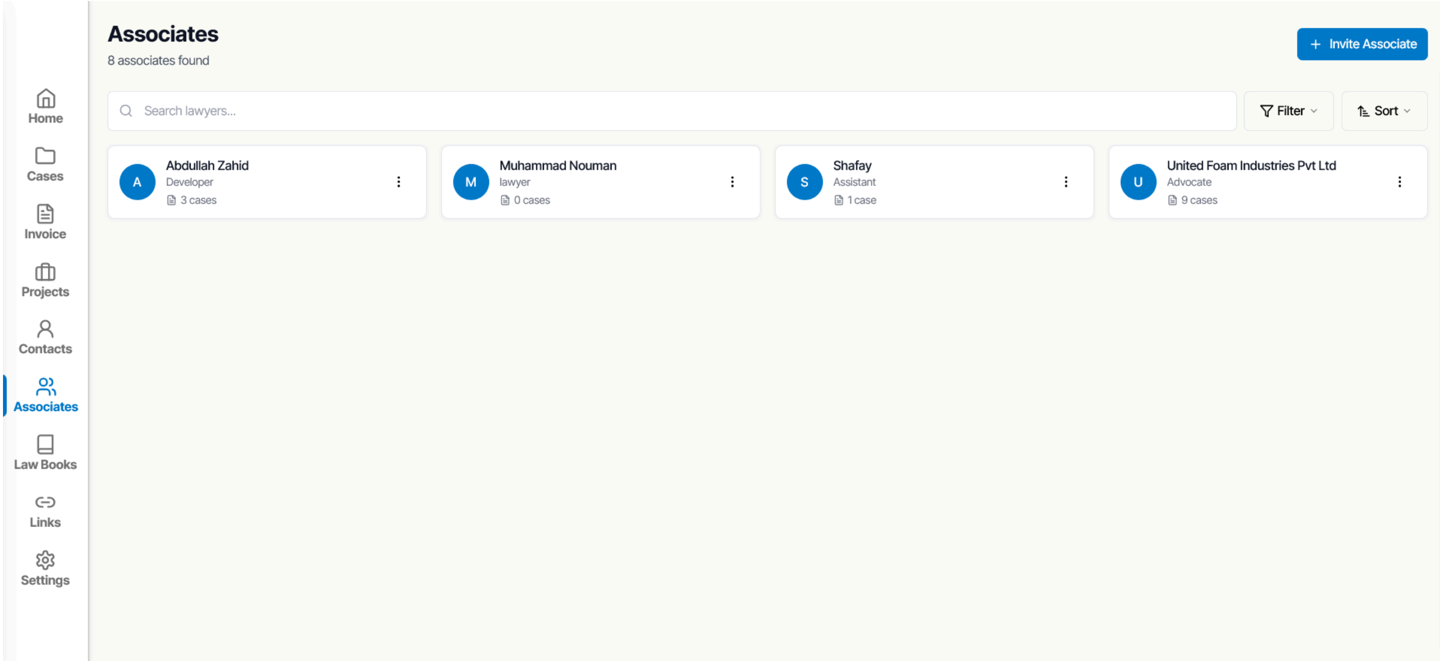
6. Managing Your Team: The Associates Module

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.

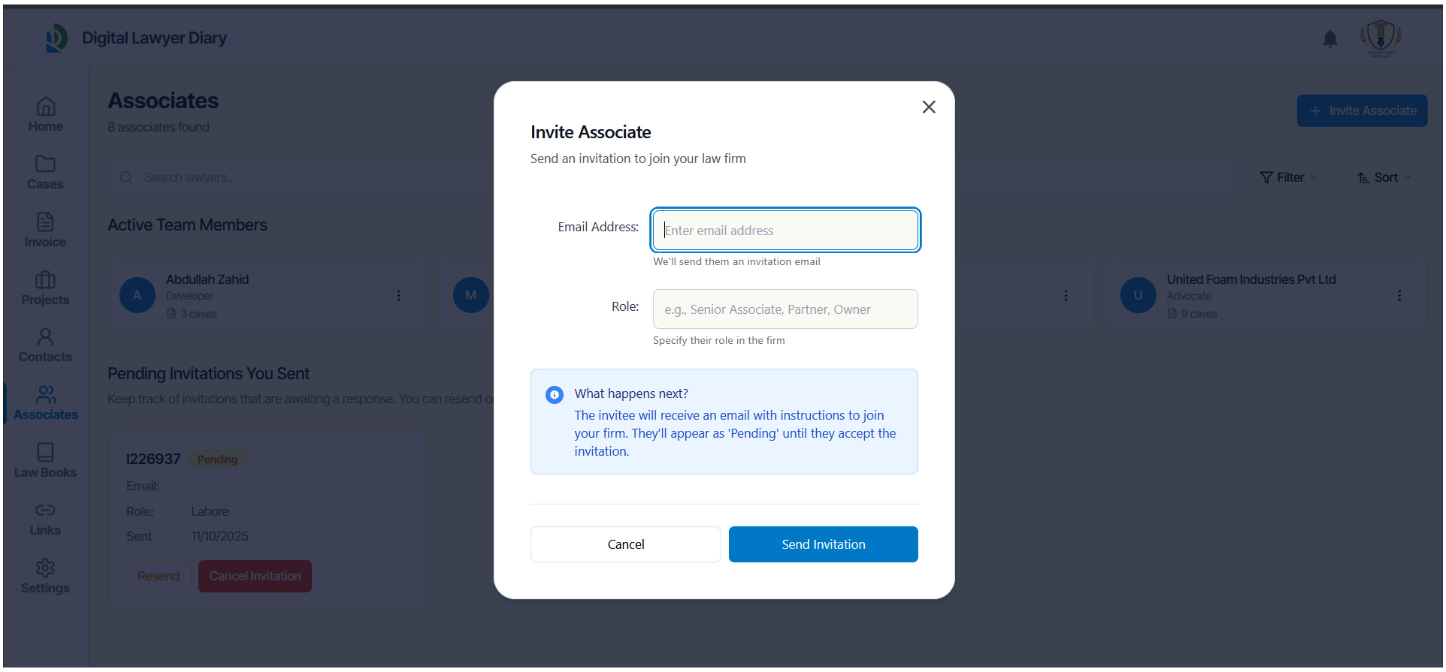
6.2 Inviting a New Associate

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.

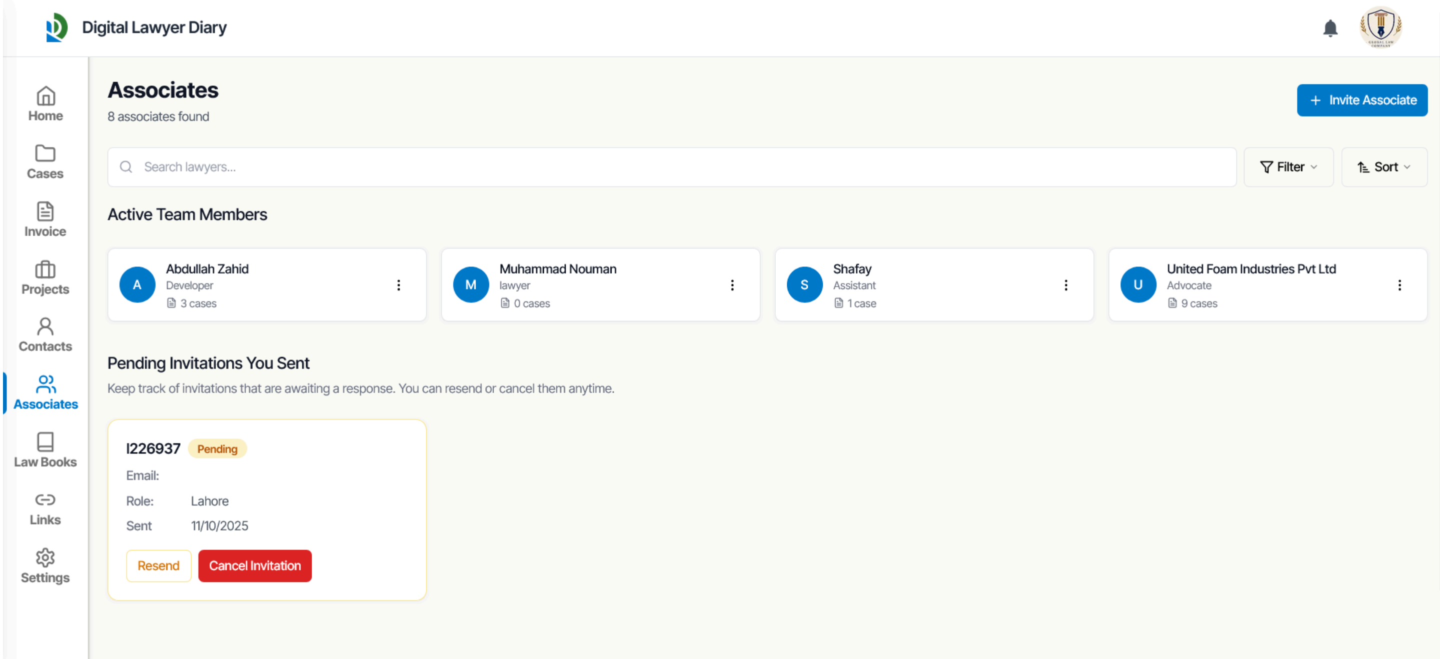


> ***What happens next?*** *The system clearly explains the process: The person you invite will receive an email and a notification within their own Digital Lawyer Diary account. They will appear in your "Pending" list until they accept.*

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.



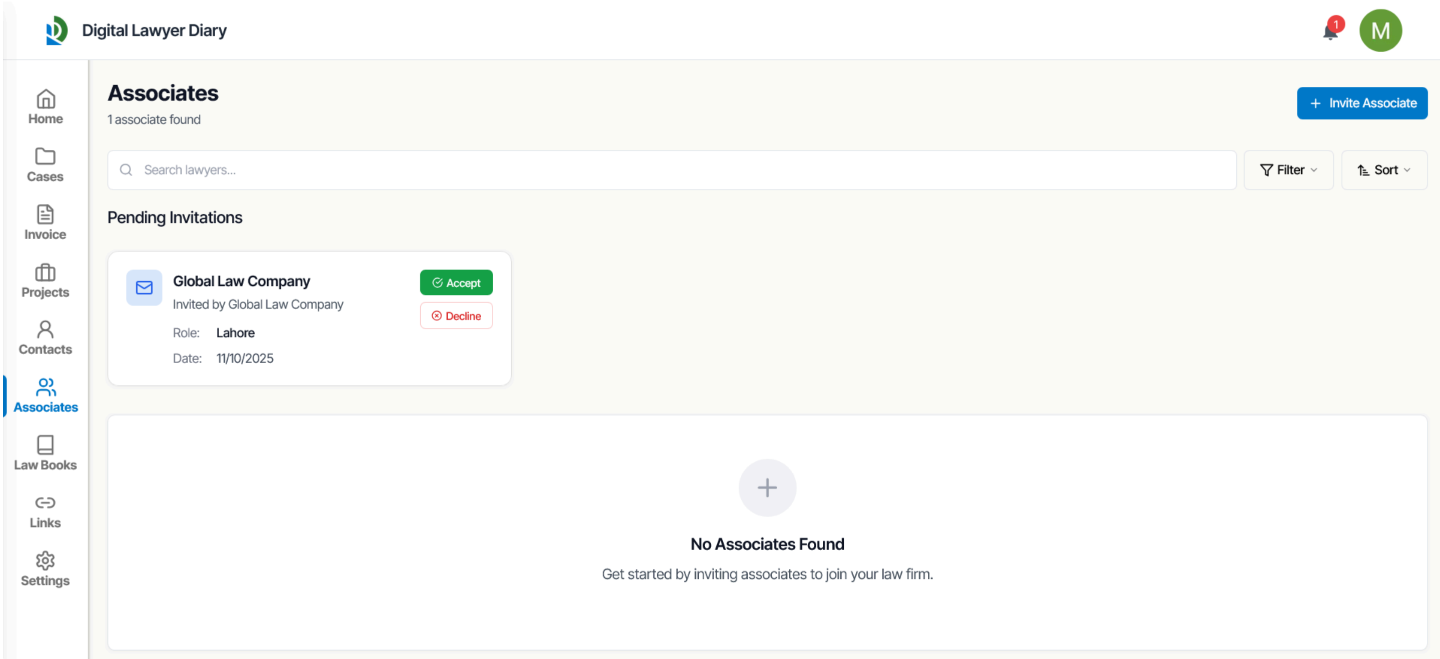
This card shows the invitee's email, their assigned role, and a "Pending" status. You have two options here:

- **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.

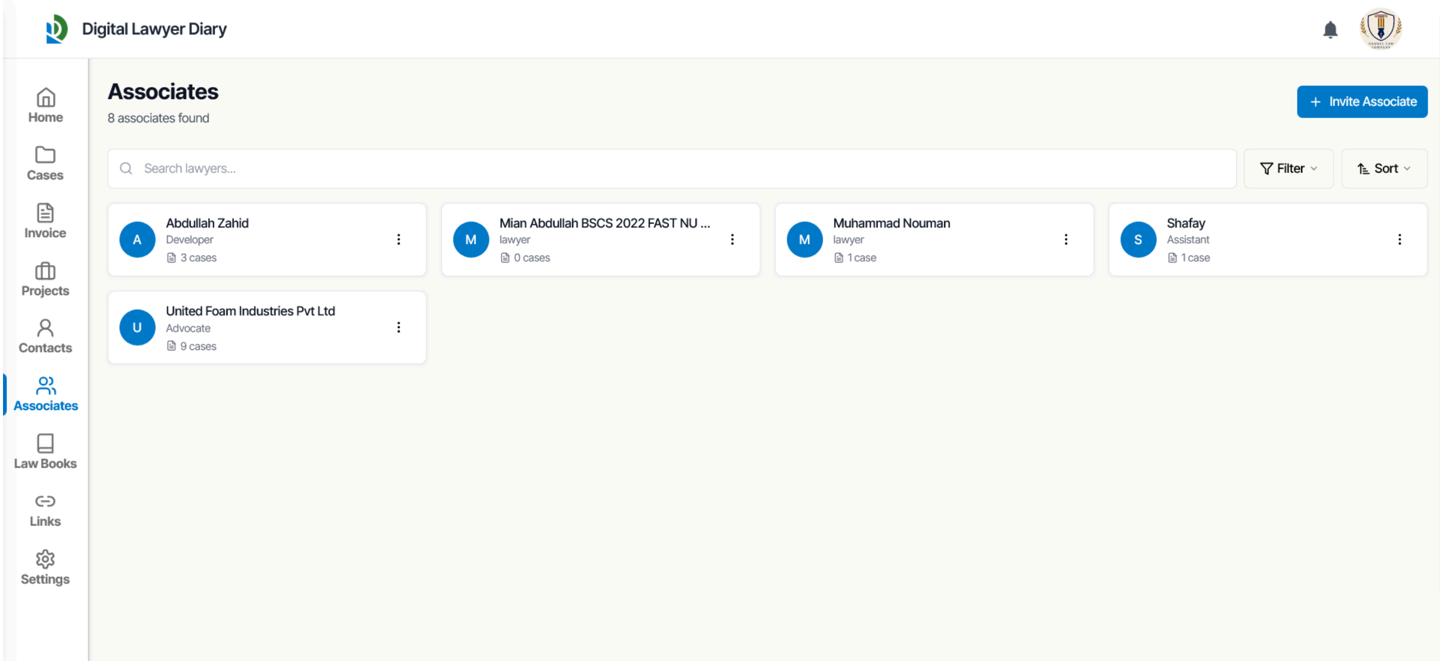


They have two choices:

- **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.



From here, you can:

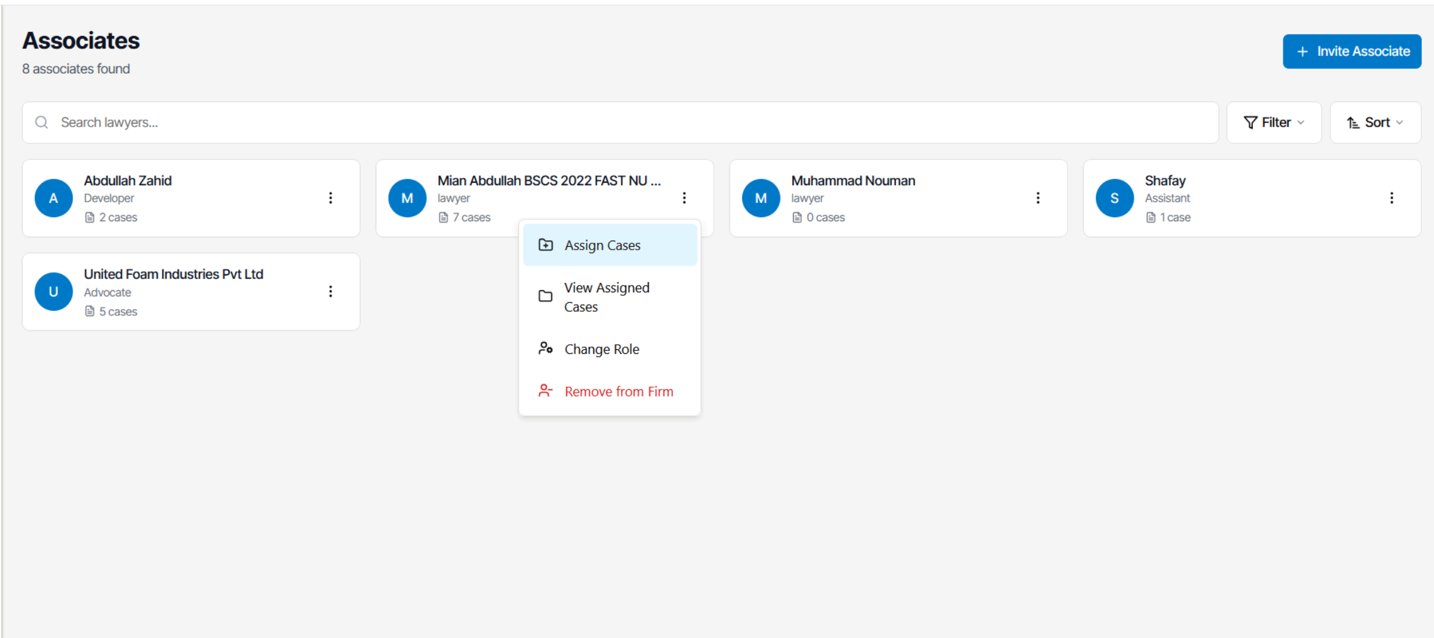
- **Assign them to cases** (as shown in the Case Management section).
- **Manage their permissions** by clicking the **three-dot menu icon** on their card. This allows you to edit their role or remove them from the firm if they leave your practice.

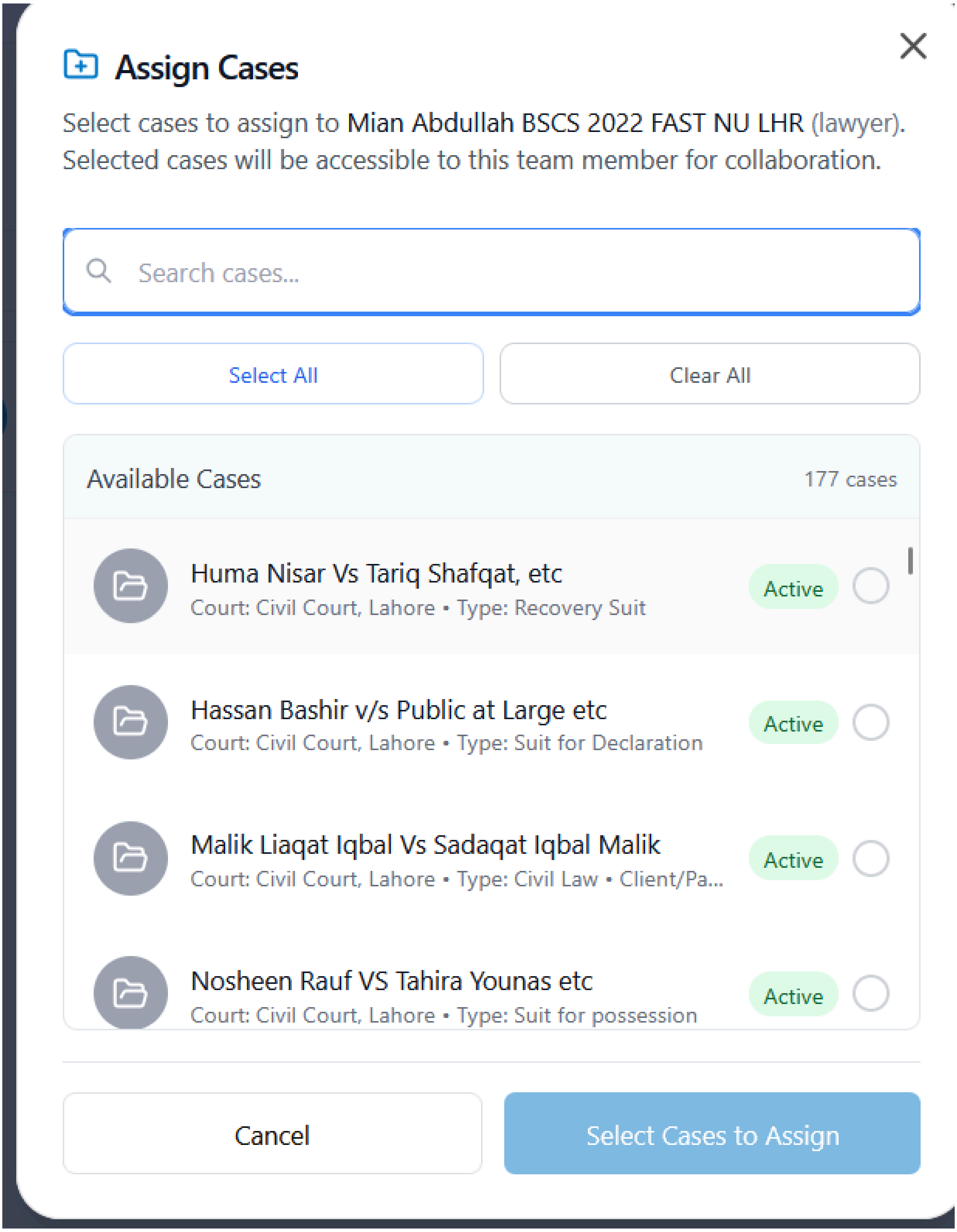
6.6 Assigning and Reviewing Cases

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.





> ***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

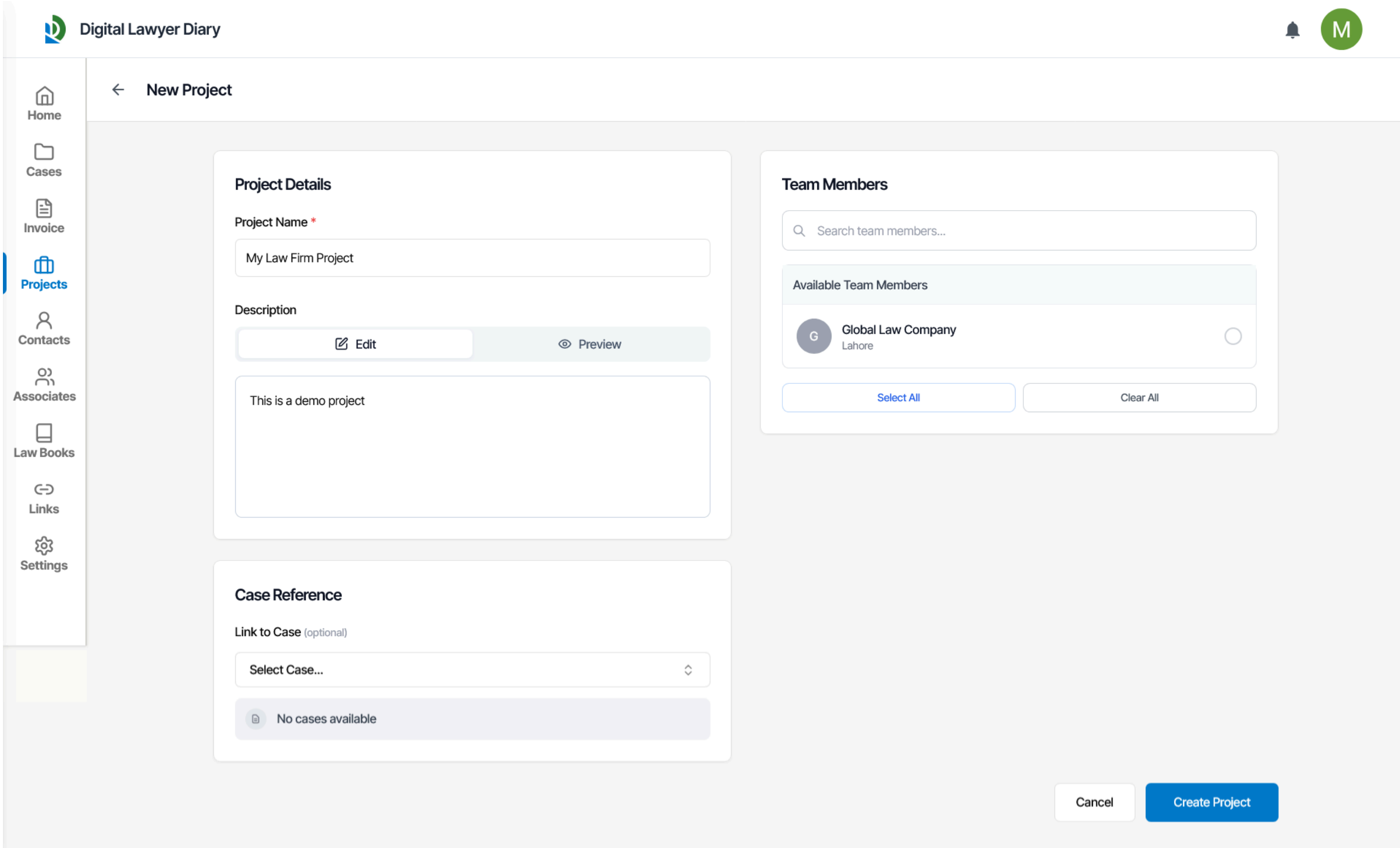
While the "Cases" module is perfect for litigation and court-related matters, the **Projects** module offers a flexible and powerful way to manage any set of tasks with a defined workflow. This is ideal for internal firm initiatives, complex client matters that aren't in litigation (like a large merger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

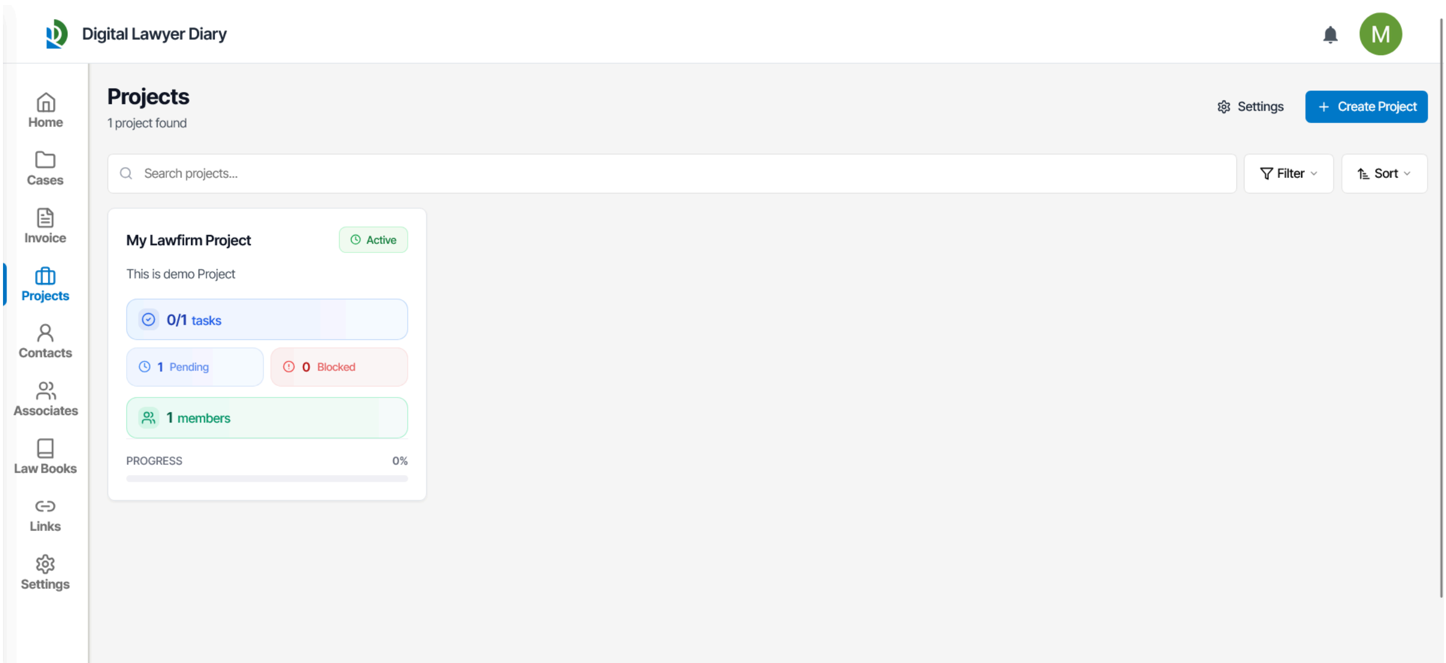


- **Project Details:**
  - **Project Name:** Give your project a clear, descriptive name (e.g., "ACME Corp Merger Due Diligence").
  - **Description:** Use the rich text editor to provide a detailed overview of the project's goals, scope, and key information. You can use formatting like bold, lists, 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.



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.

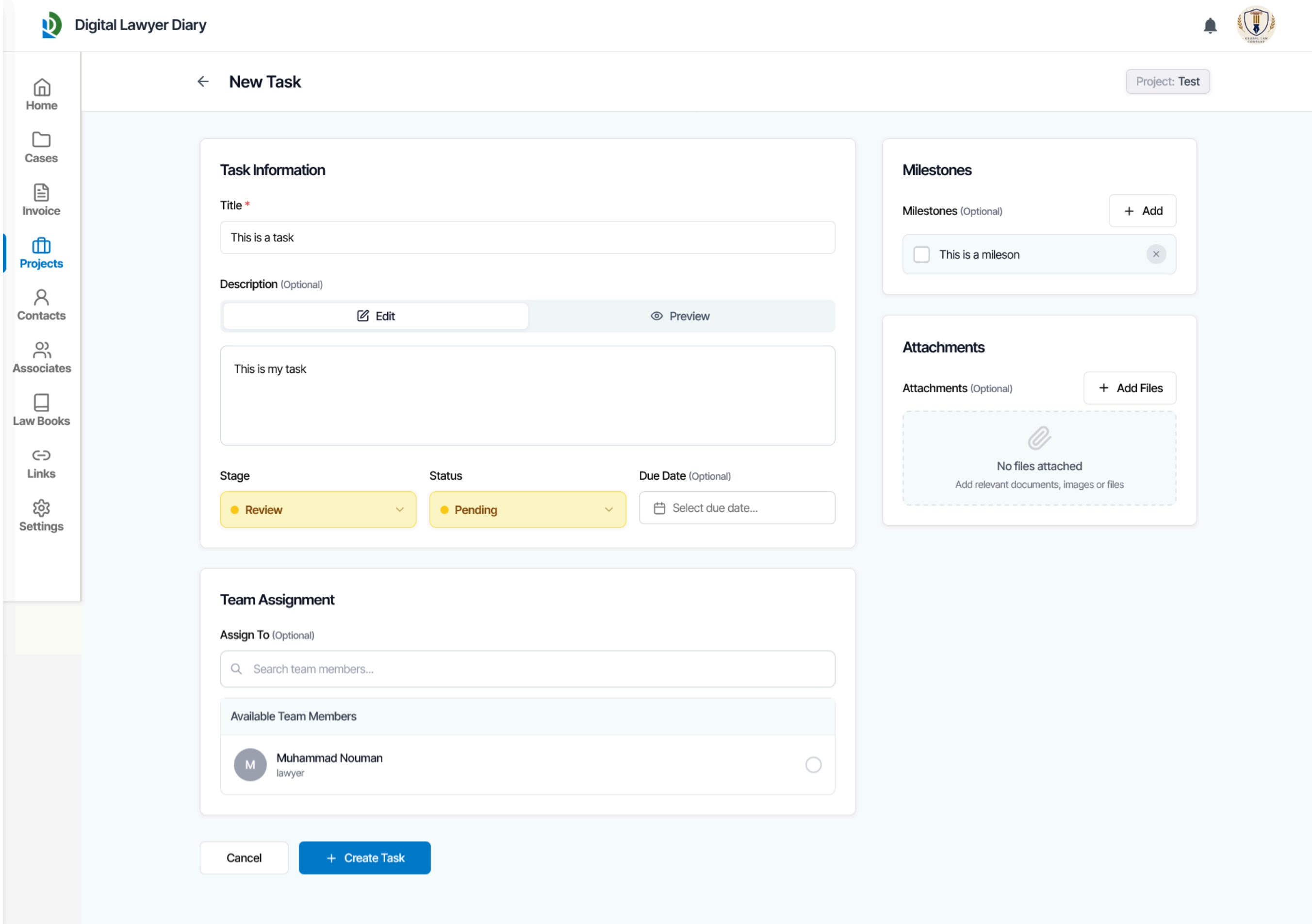
Creating a Task

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"**.

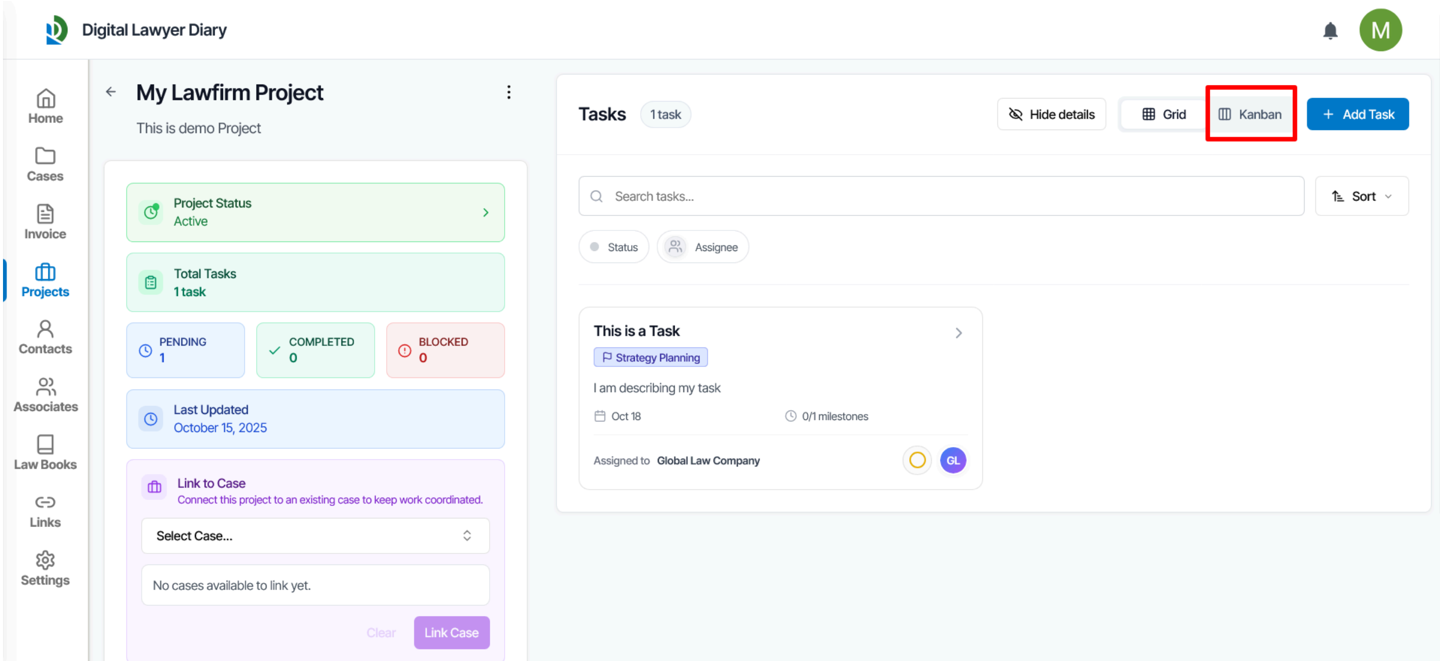


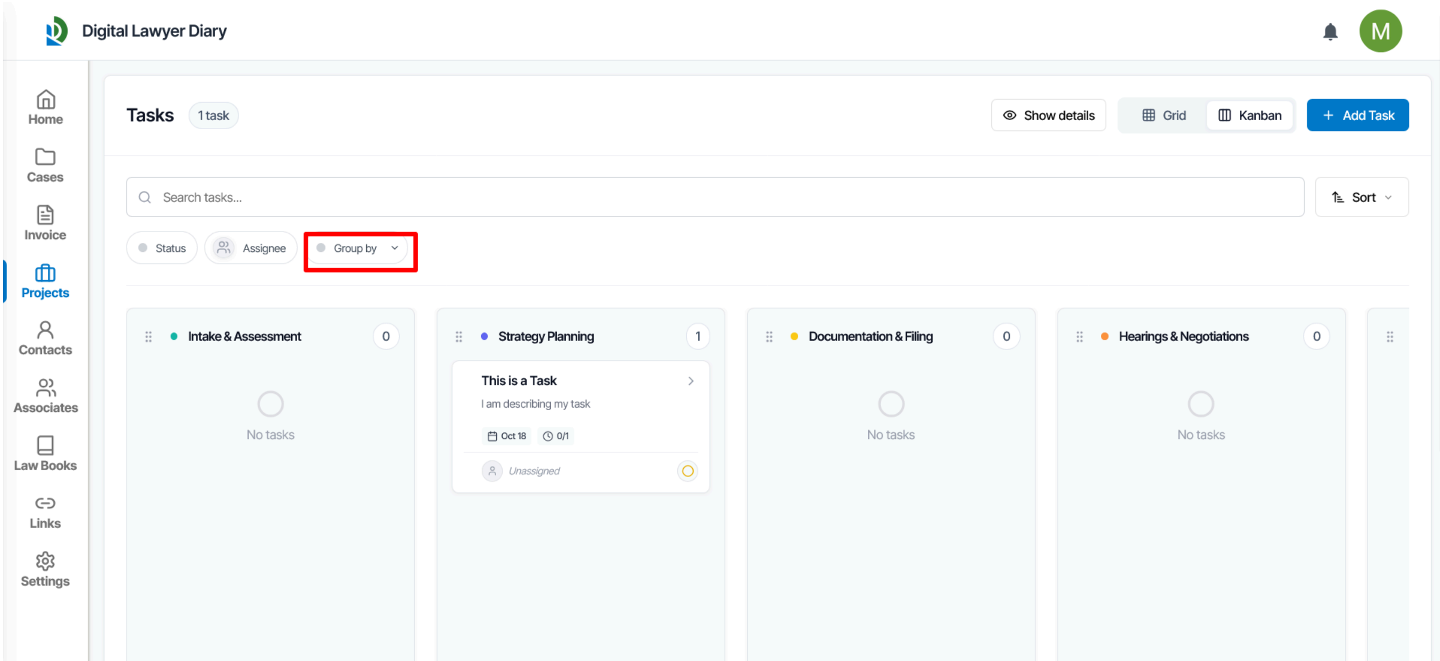
Visualizing Your Tasks: The Kanban Board

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.*



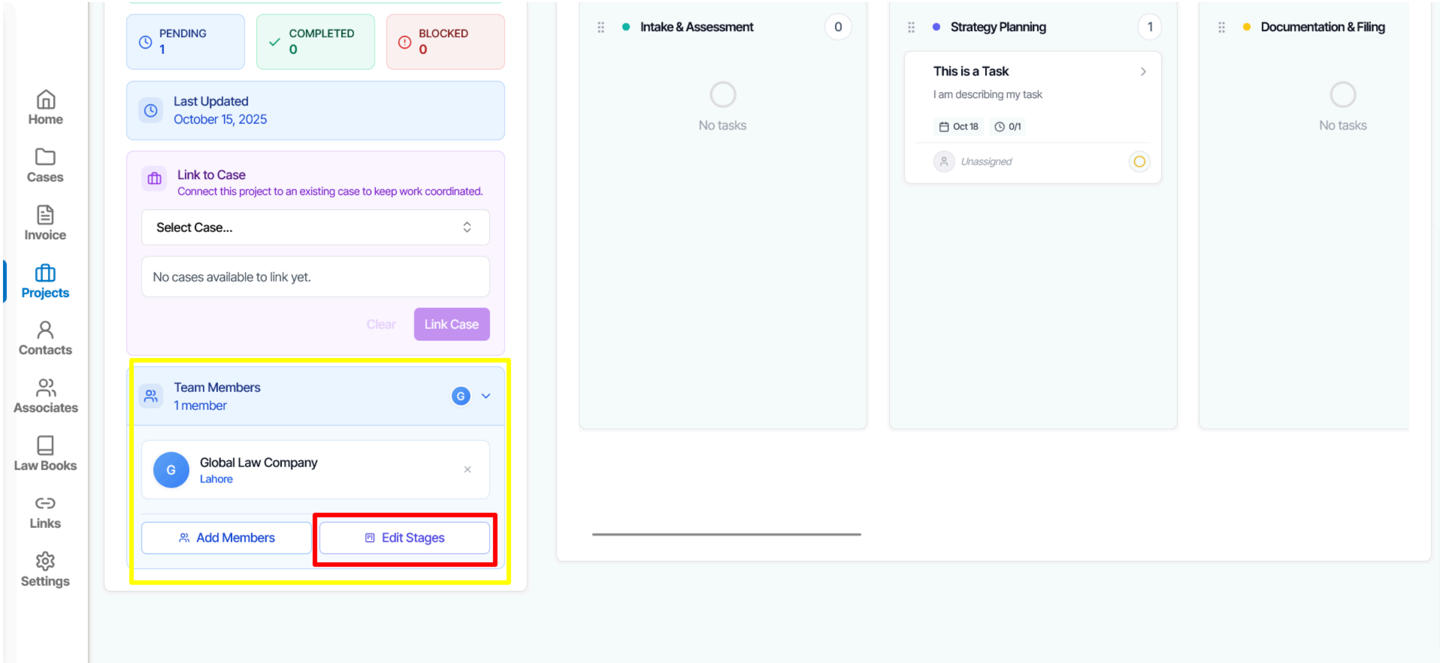


You can also change how the Kanban board is grouped by using the **"Group by"** filter to organize columns by **Status**, **Assignee**, or **Due Date**.

7.4 Personalizing Your Workflow: Project-Specific Stages

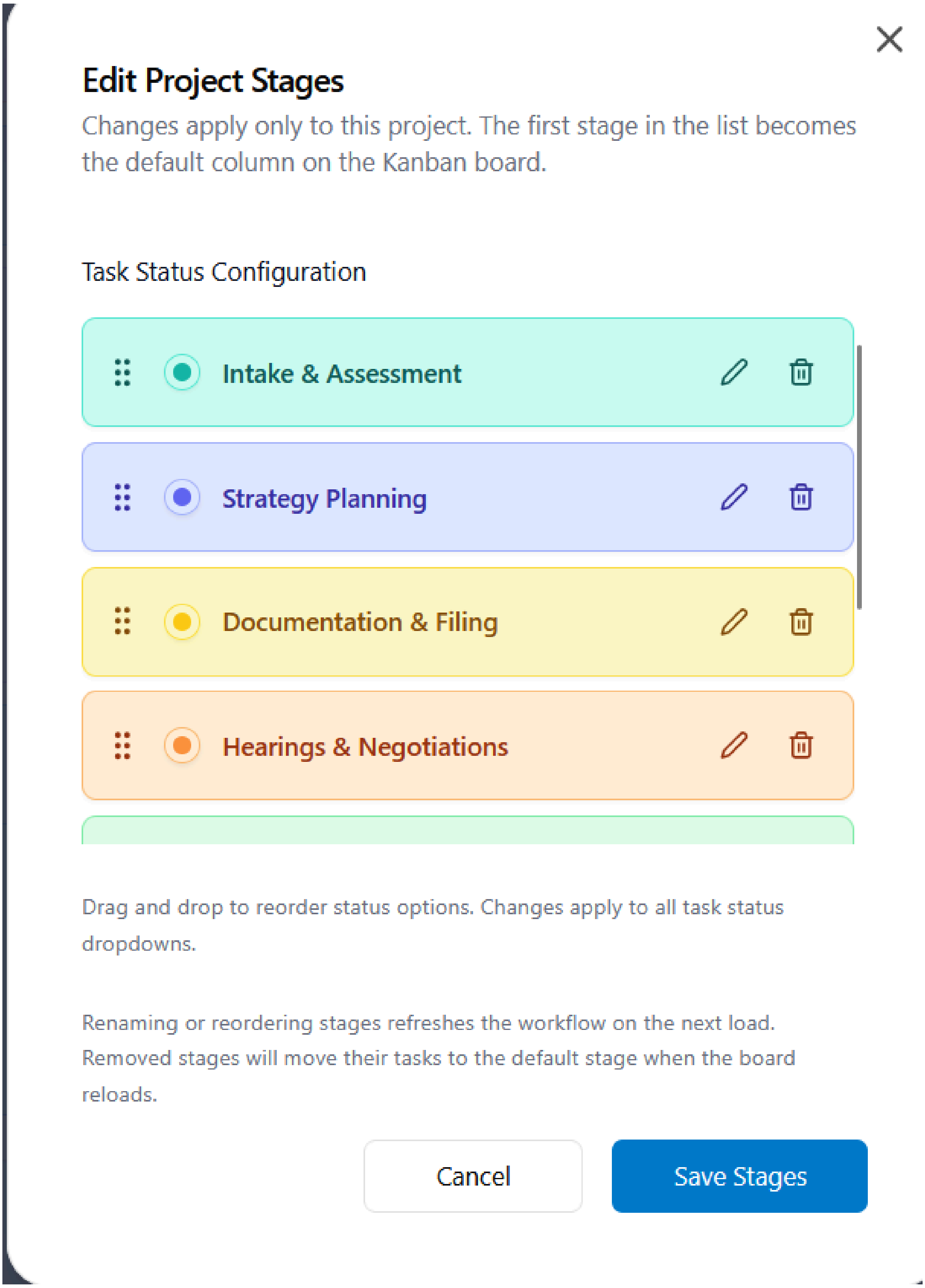
Every project is different. A contract review has a different workflow than a property acquisition. Your Digital Diary allows you to **customize the workflow stages for each project individually** without affecting any other project.

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"**.



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

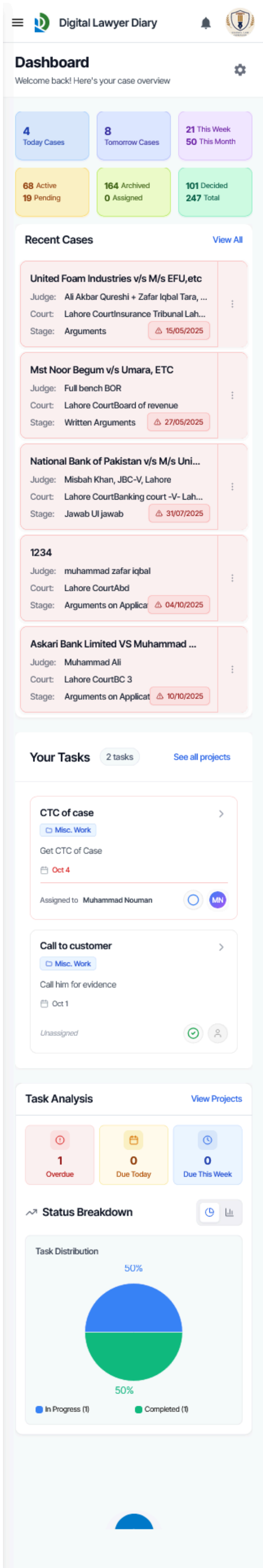
As the project evolves, you can easily manage your team and references.

- **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.

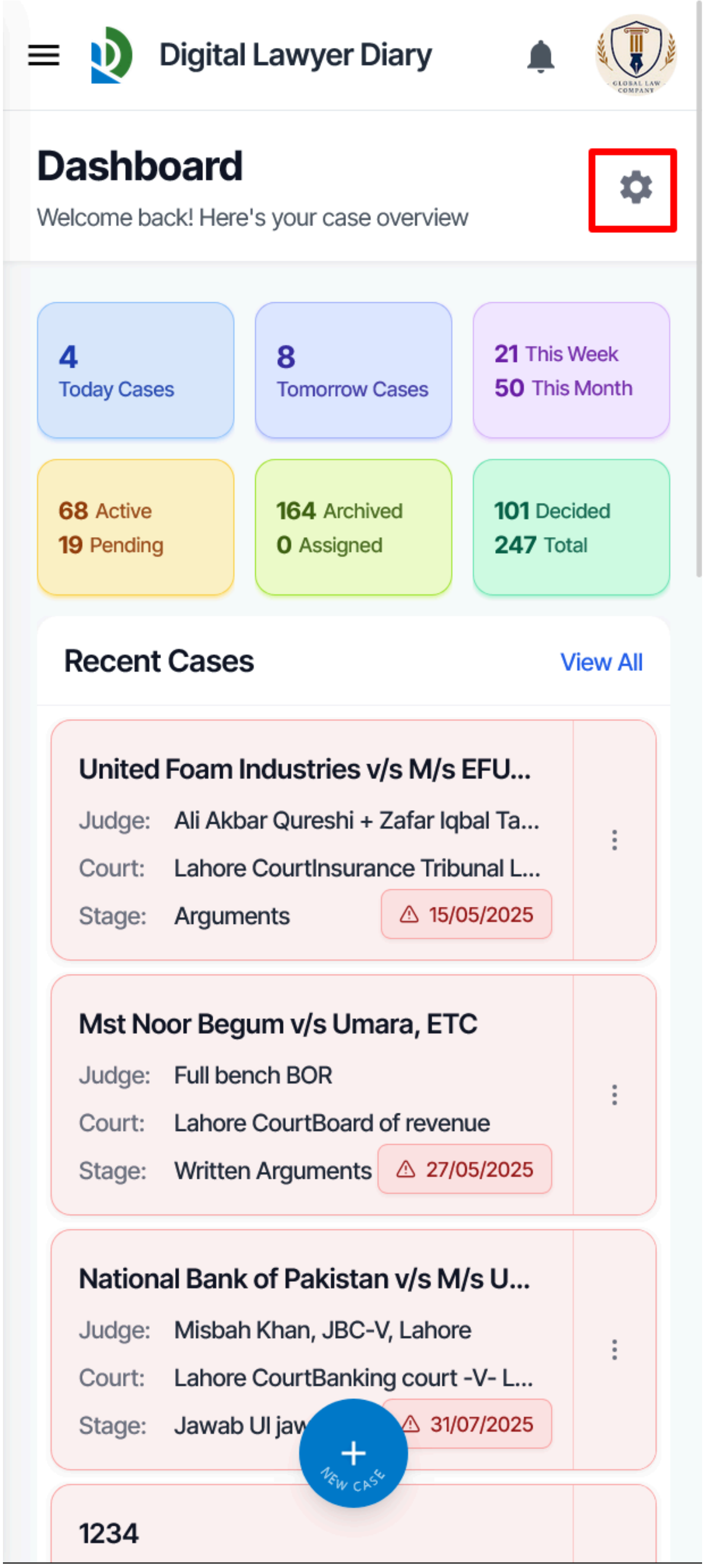
The true power of the dashboard is its flexibility. You can completely personalize it to fit your workflow.

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.

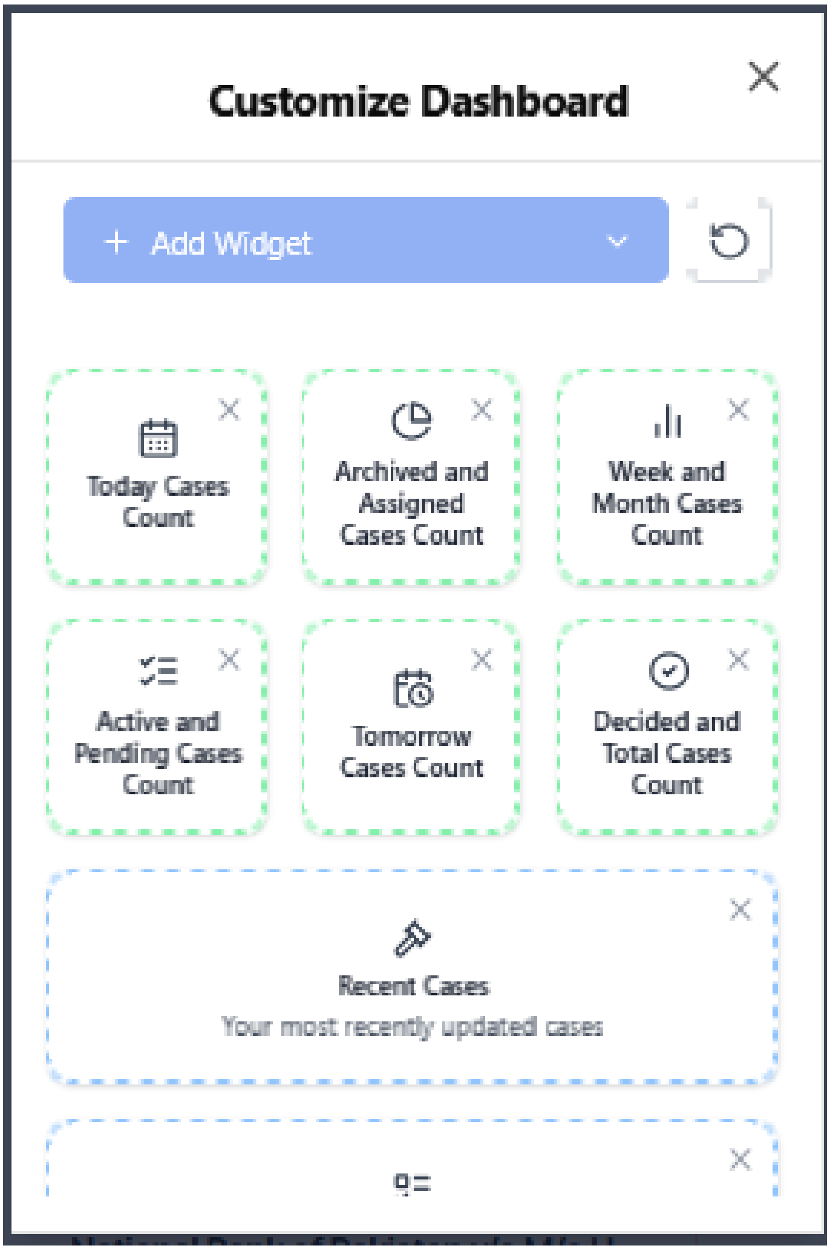
Step 1: Enter Customization Mode

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



Mobile Customization Icon Placeholder

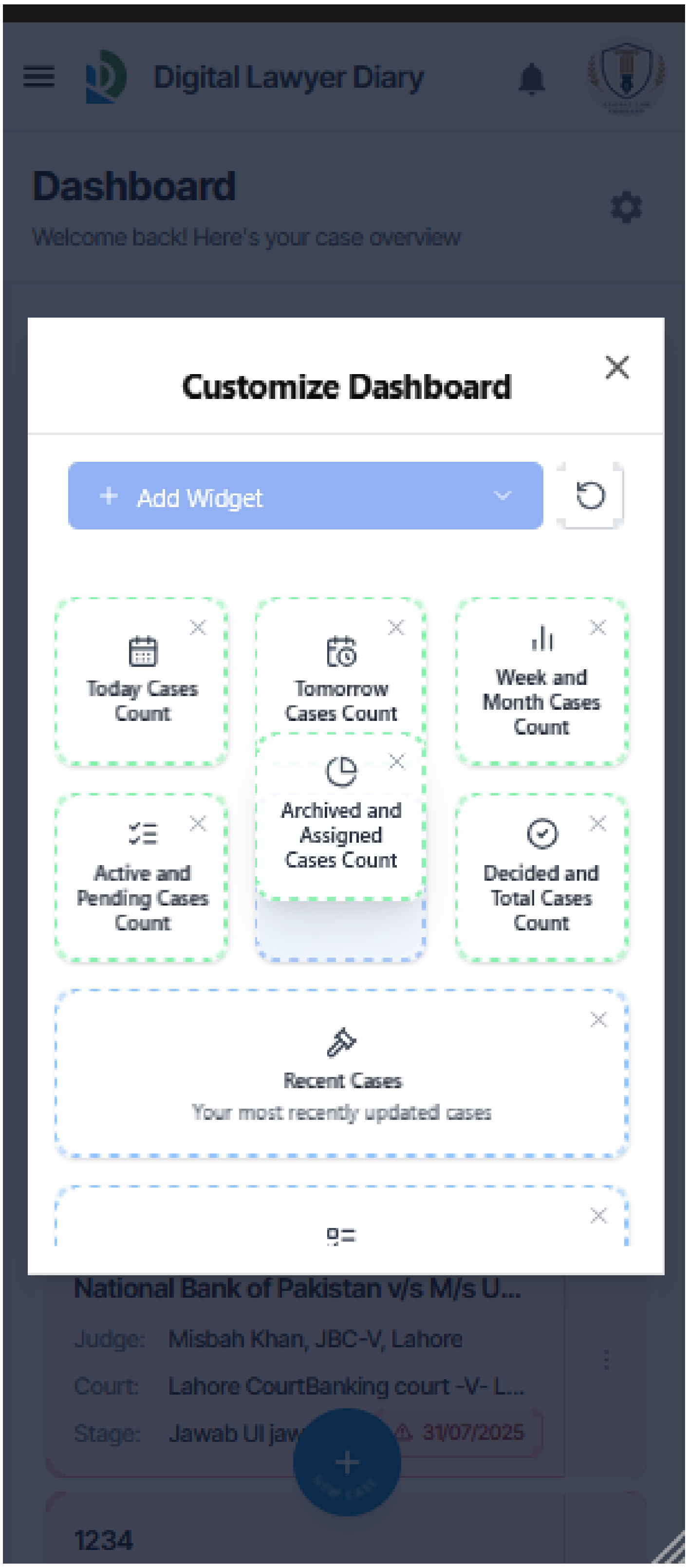
You'll know you're in customization mode when a popup appear



Step 2: Rearrange and Resize Widgets

Once in customization mode, you can organize your workspace.

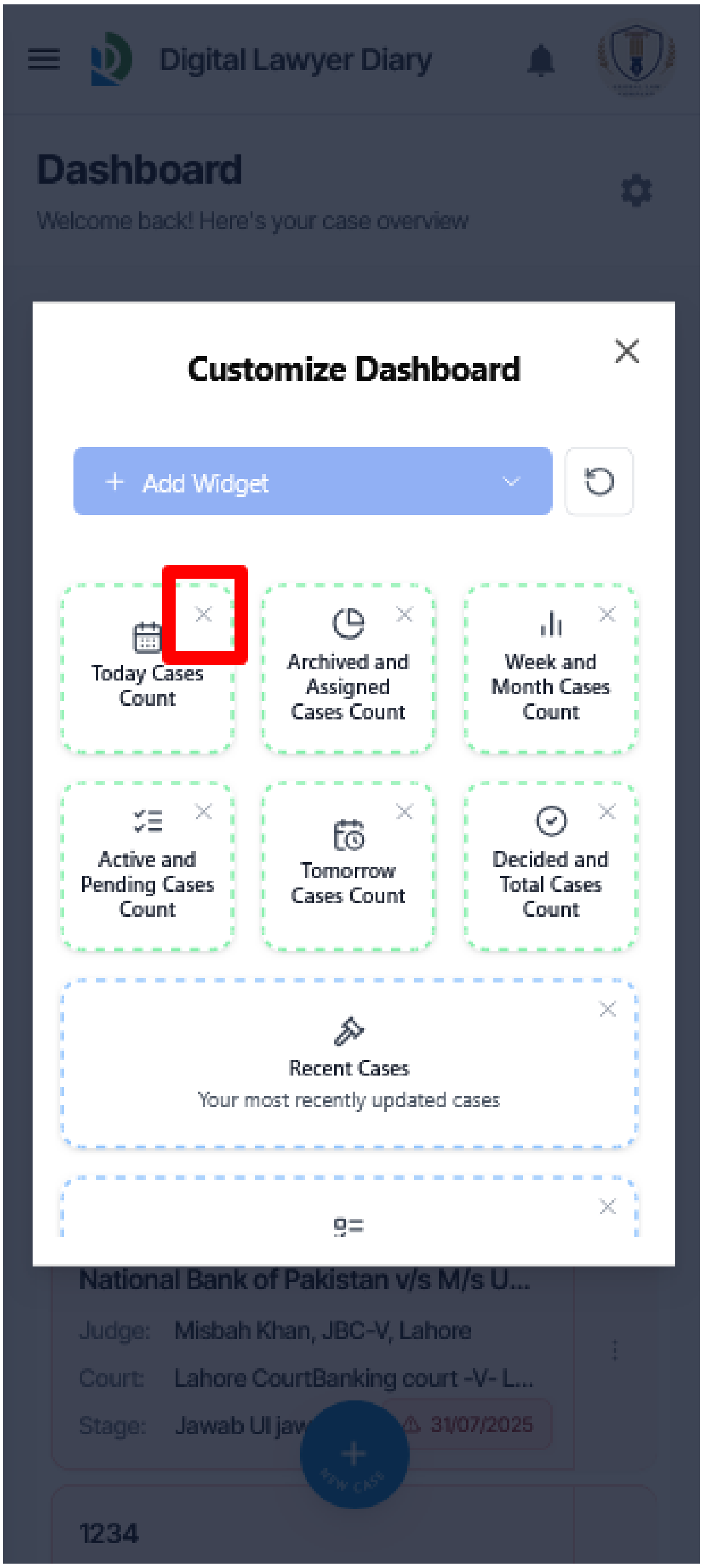
- **To Move a Widget:** Click and hold the widget, drag it to your desired location, and release.
- **To Resize a Widget:** Hover over the bottom-right corner of a widget until your cursor changes, then click and drag to make it larger or smaller.



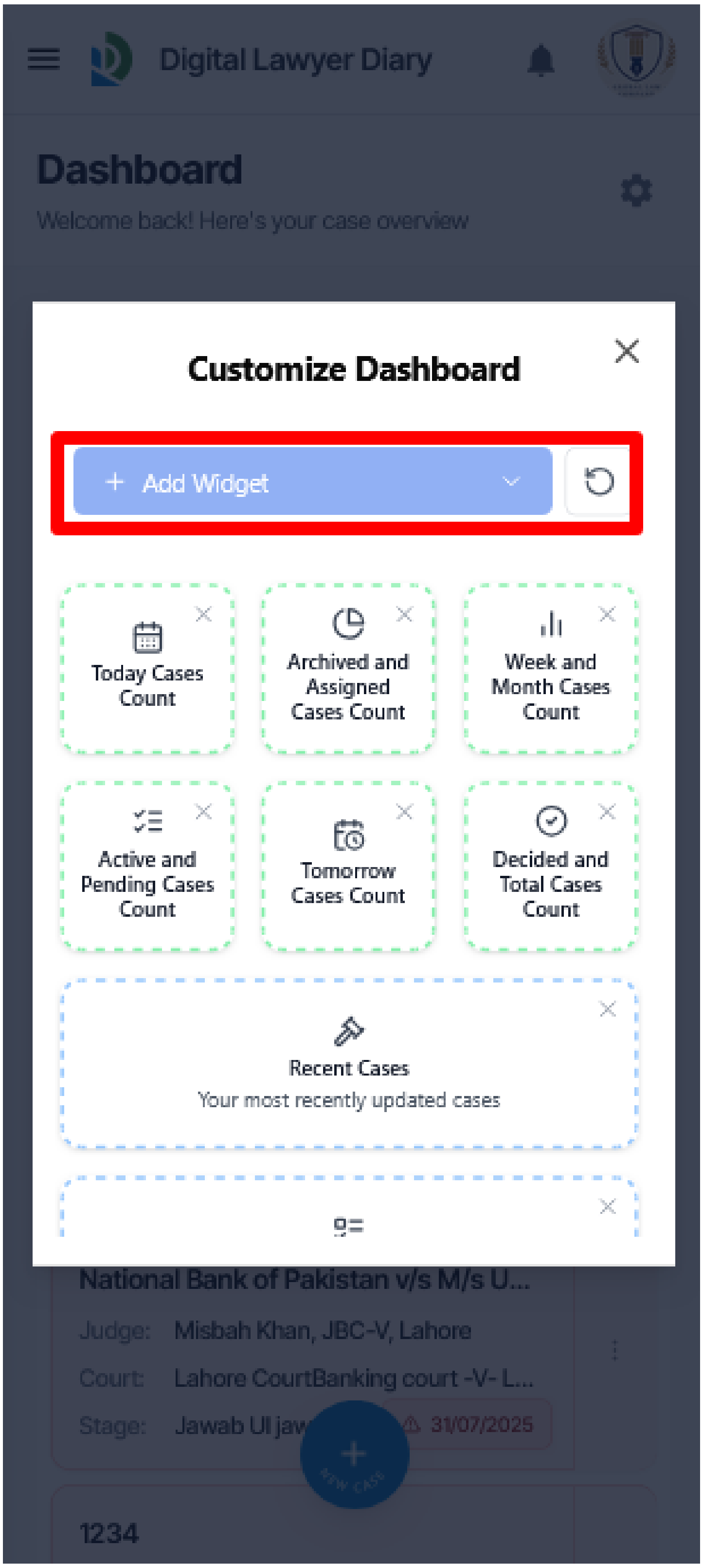
Step 3: Add and Remove Widgets

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.*

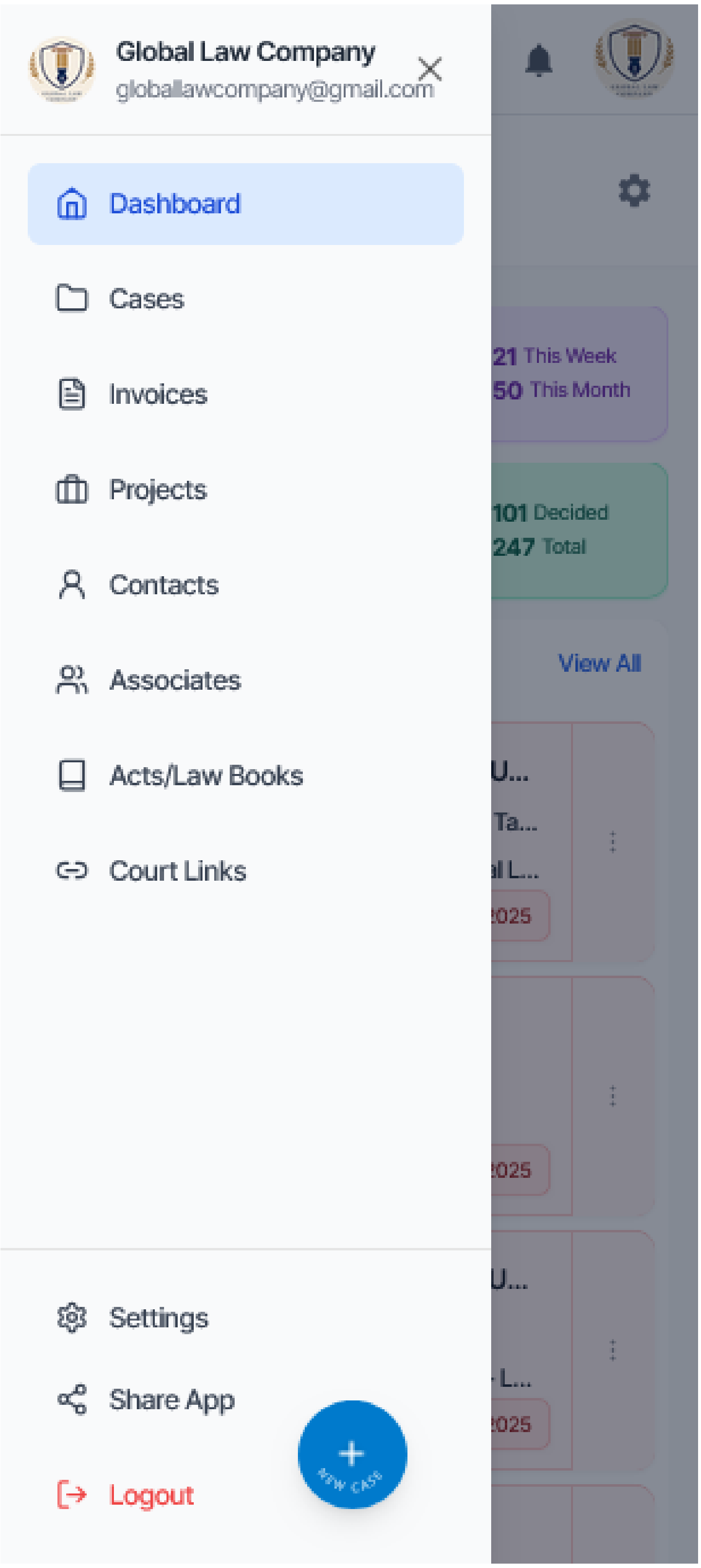
M3. Mobile Navigation: Quick Access on the Go

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.

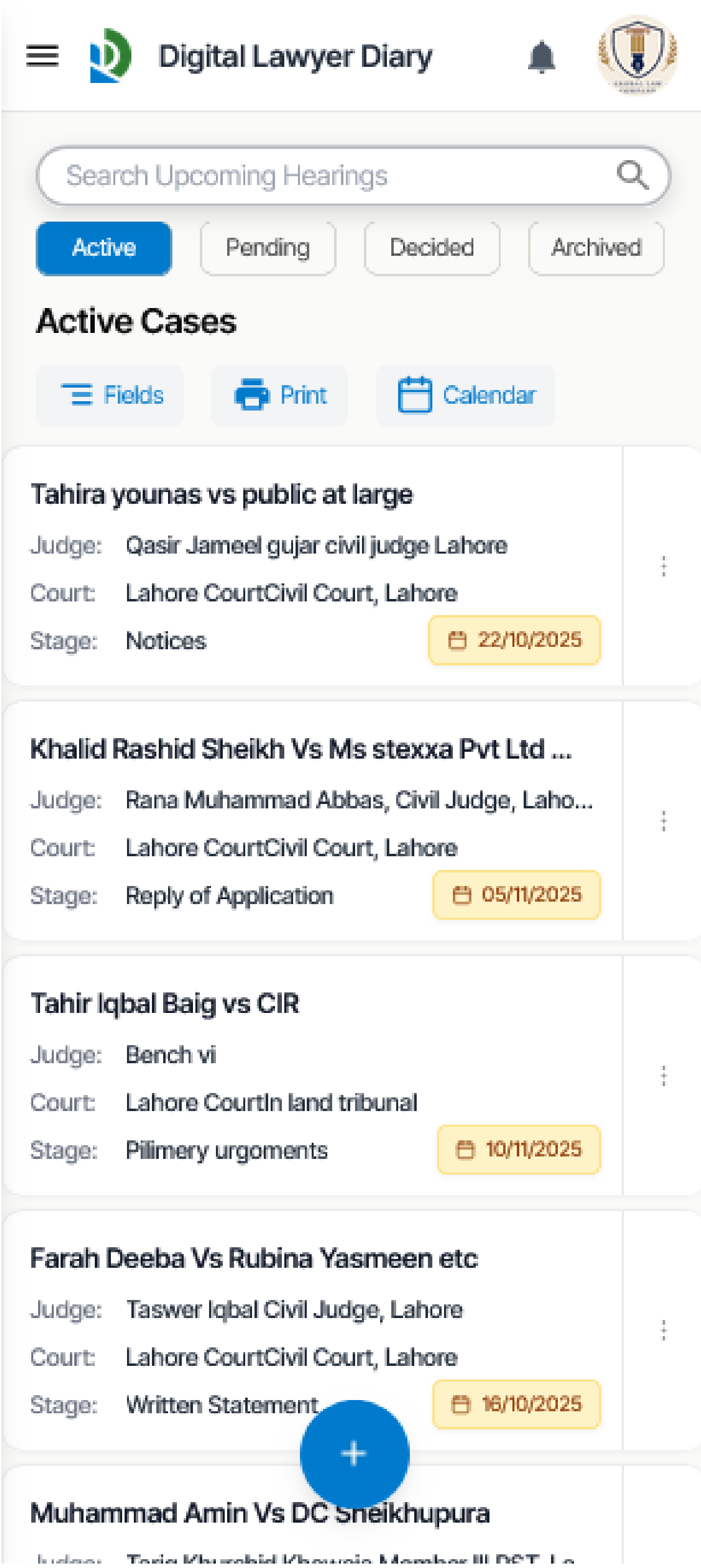
M4. Case Management: The Heart of Your Practice

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.

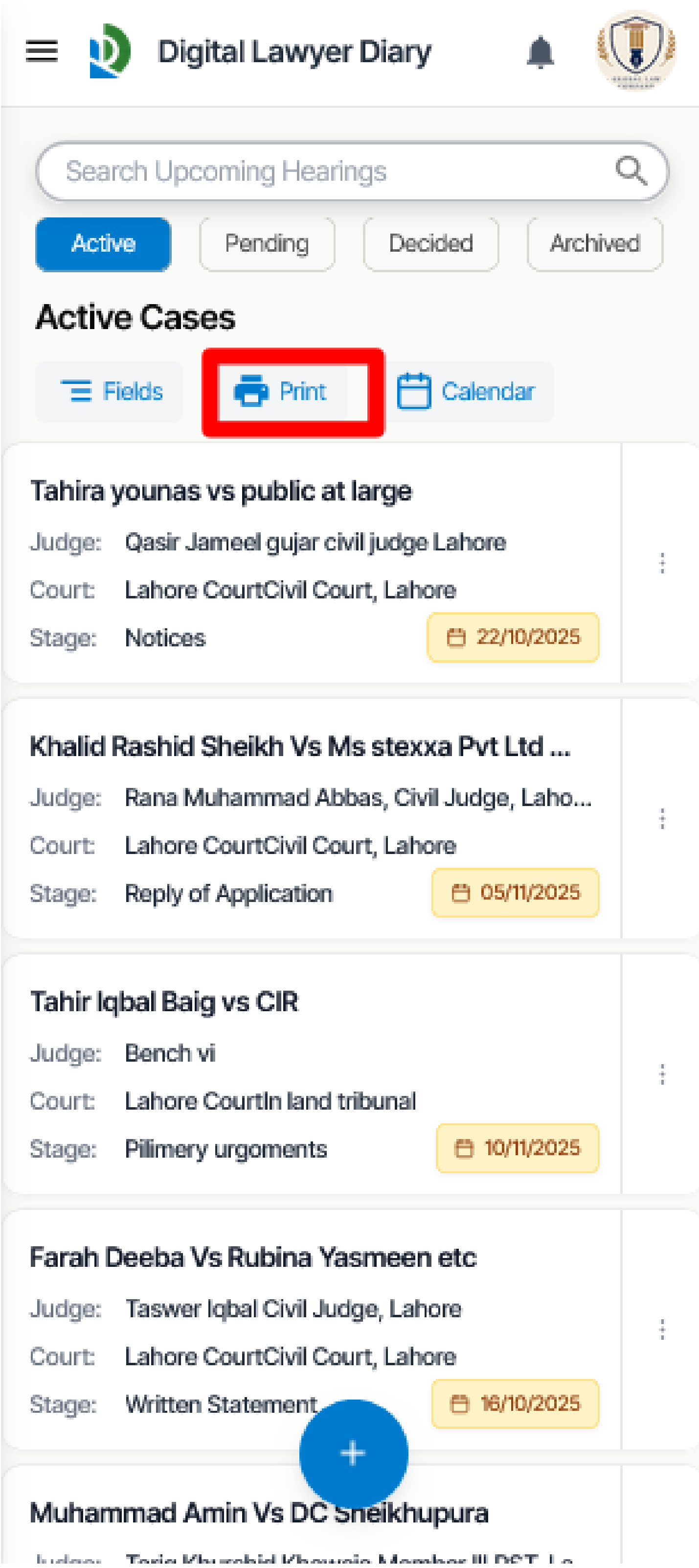
M4.1 The Cases List View

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

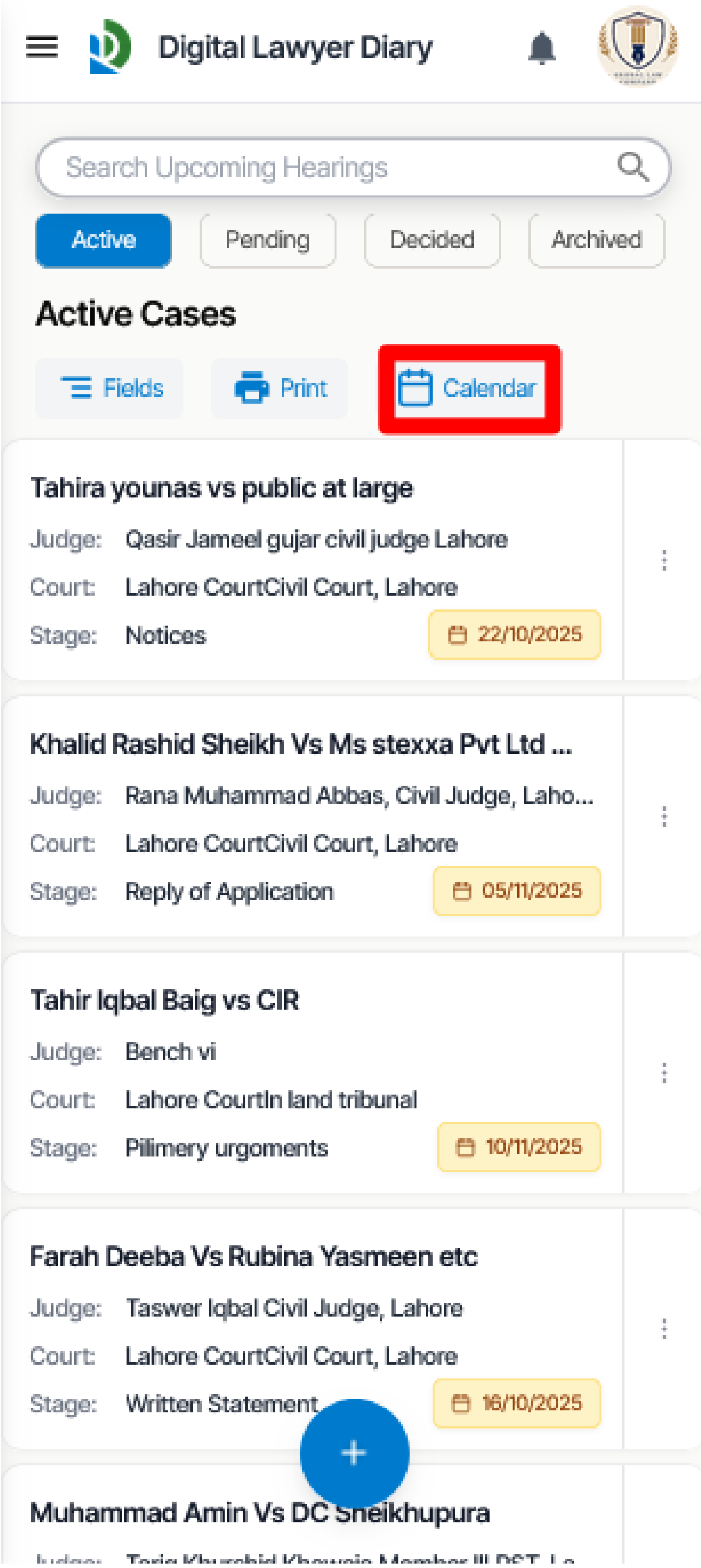


Here, you have several powerful tools at your disposal:

- **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.



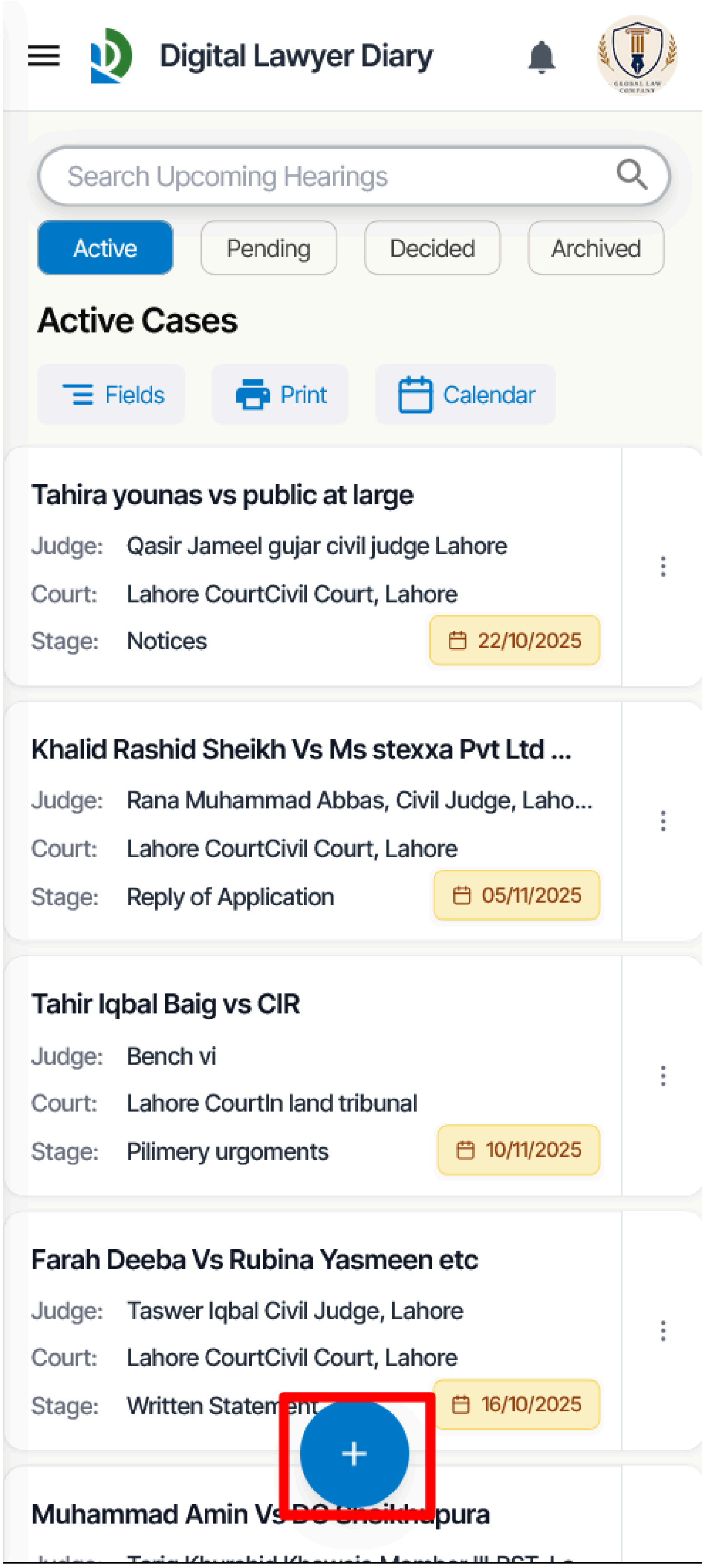
- **Customize:** Click the **Customize** button to choose which columns are visible in your table, allowing you to see only the information that matters most.
- **Calendar View:** Click the **Calendar View** icon to see your cases plotted on a monthly calendar based on their "Next Date."



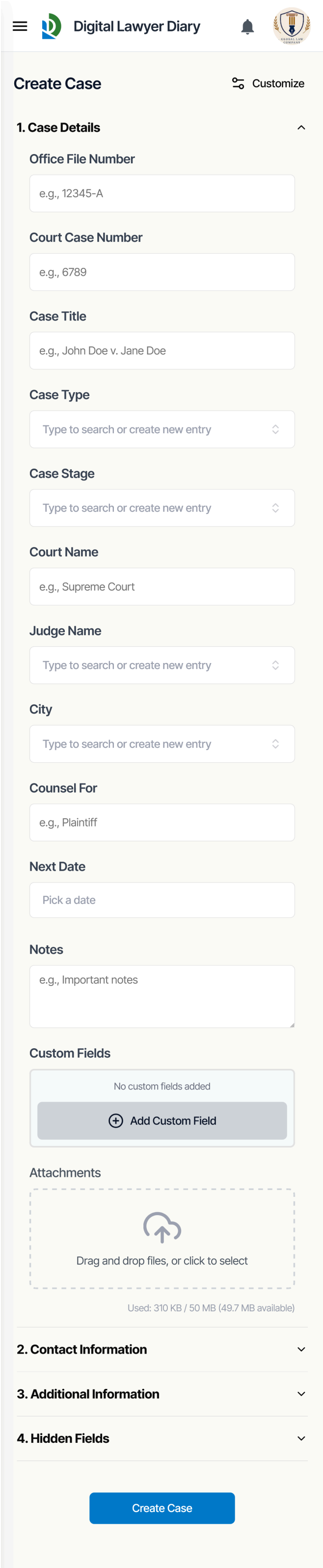
M4.2 Creating a New Case

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**.

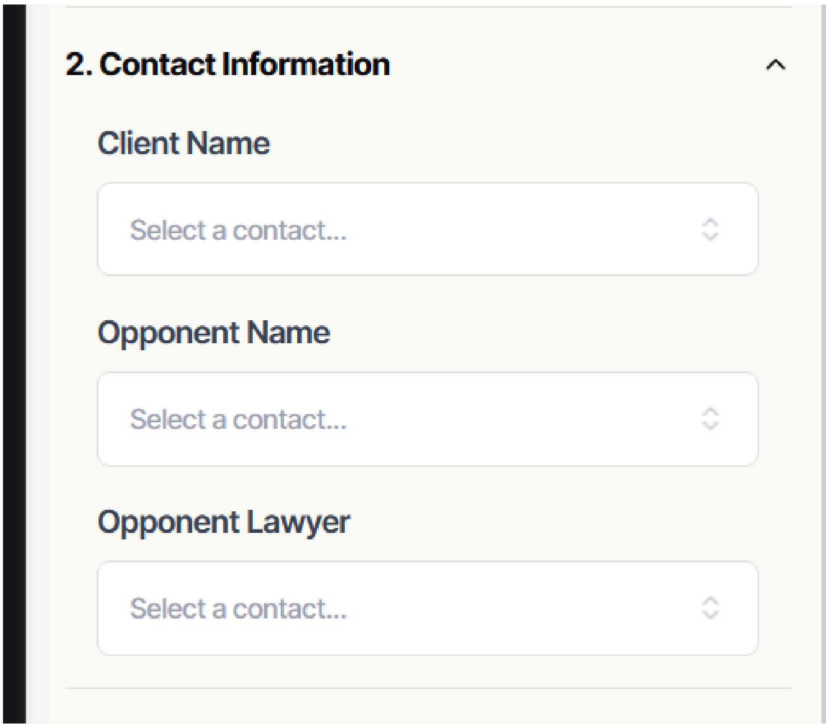
Step 1: From the Cases list view, click the **"+ Create Case"** button.



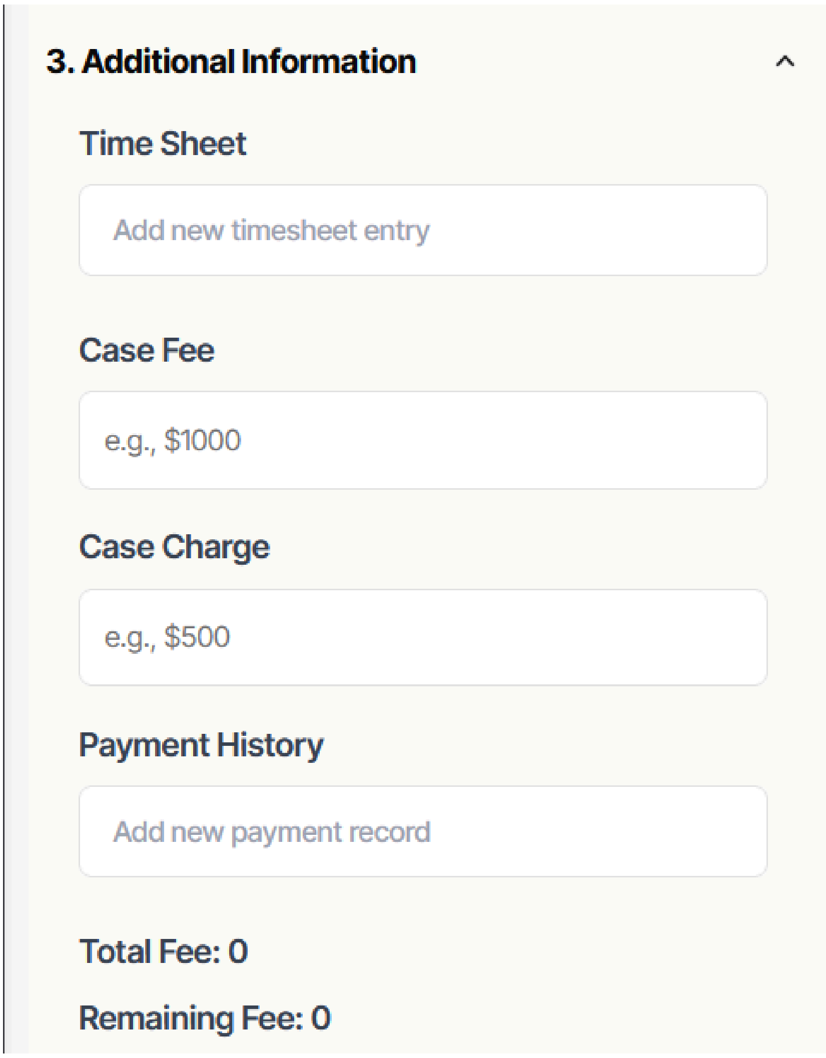
Step 2: Fill out the **Create Case** form. The form is divided into clear, collapsible sections.



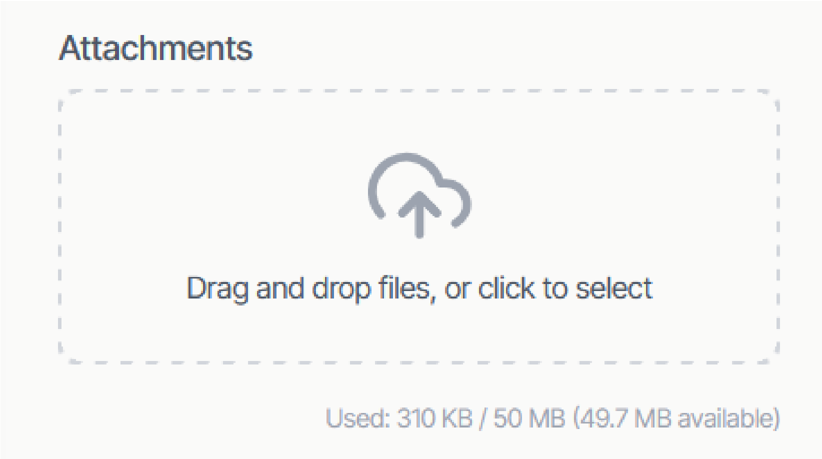
- **Case Details:** Enter the core information like Office File Number, Court Case Number, Case Title, Type, Stage, Court Name, Judge Name, and Next Date.
- **Contact Information:** Link the case to existing contacts for your Client, the Opponent, and the Opponent's Lawyer.

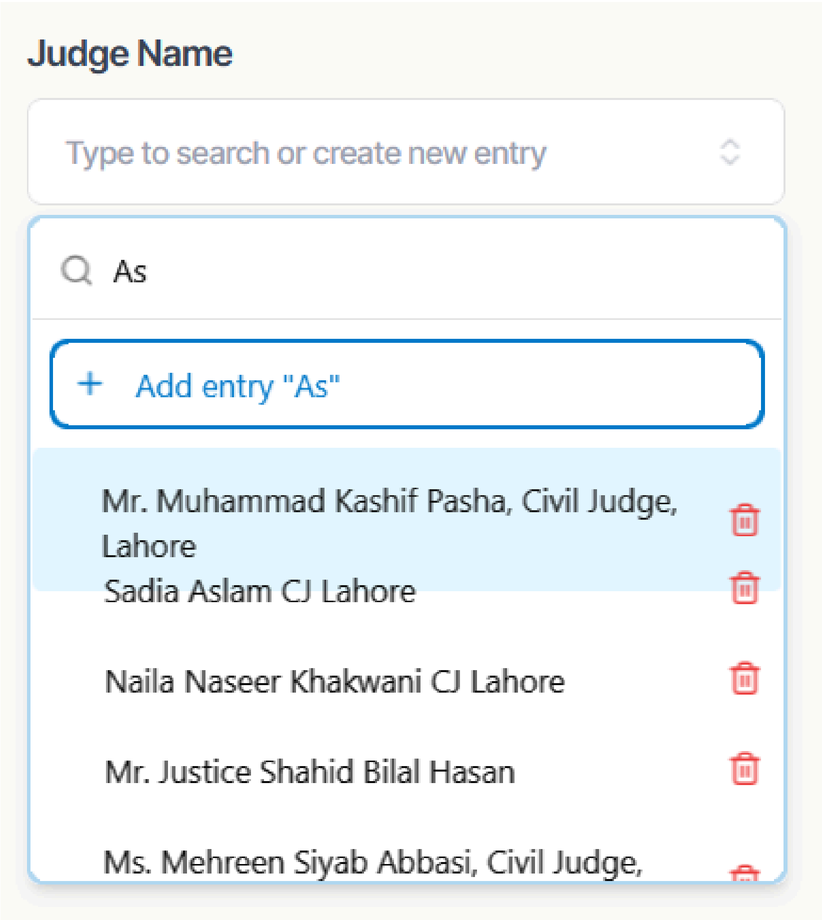


- **Additional Information:** This section is for financial tracking and time management. You can add Timesheet Entries, set the Case Fee and Charges, and log Payments received. The system will automatically calculate the Total and Remaining Fee.



- **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



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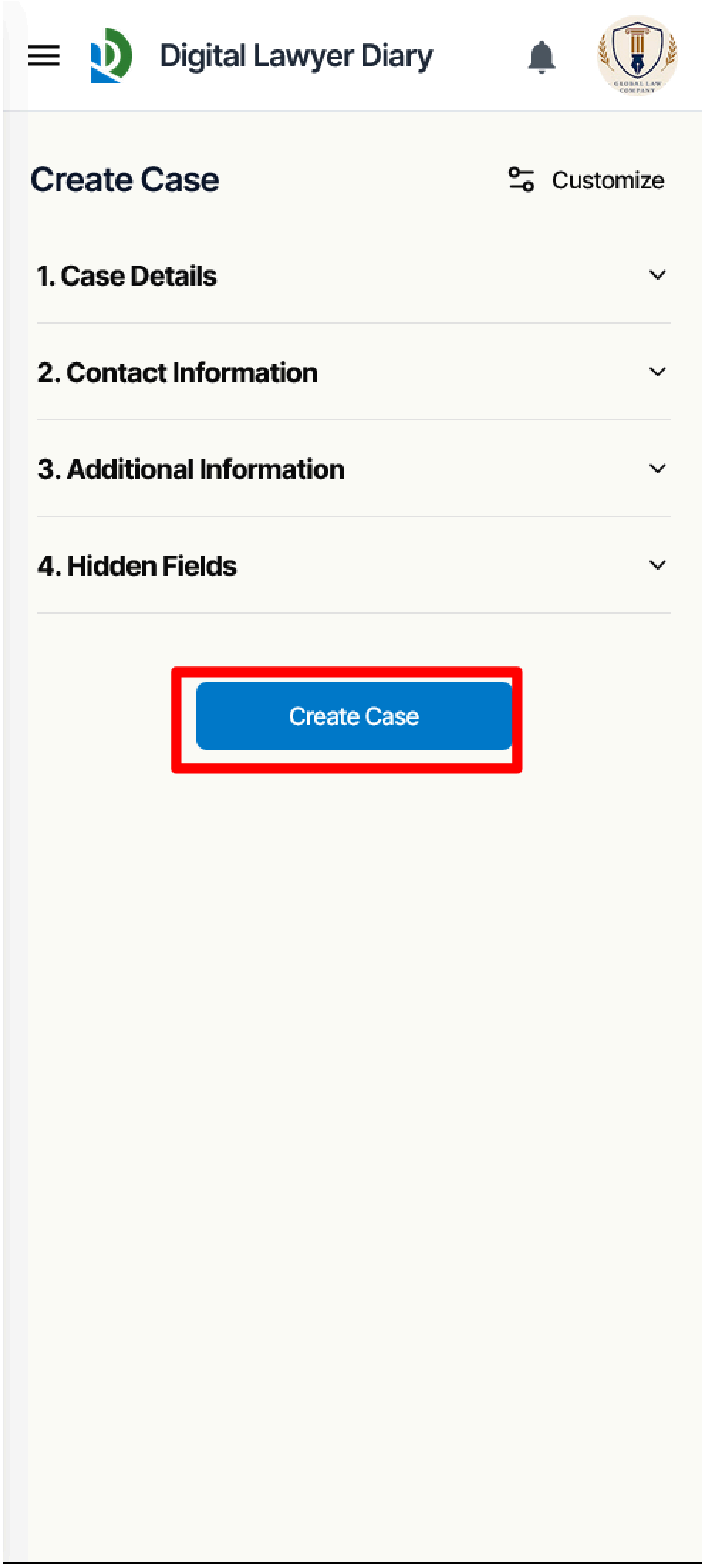
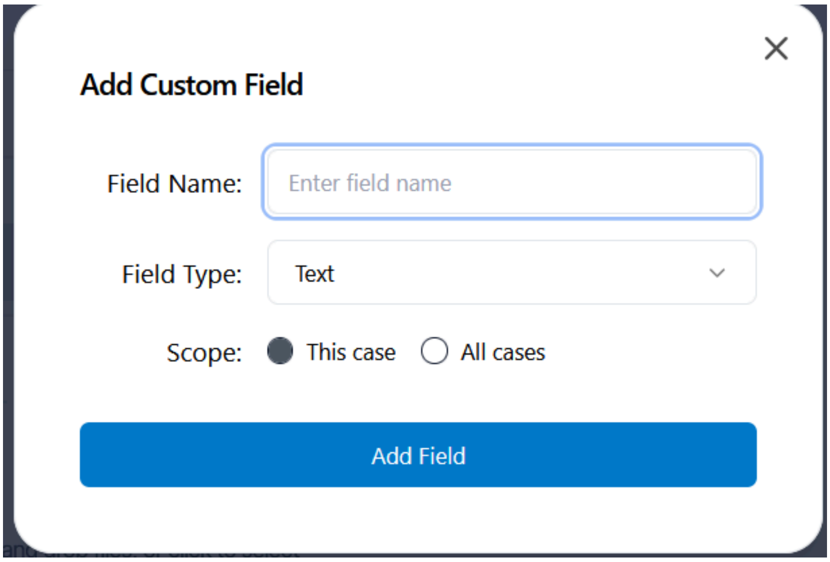
Step 3: Once all the information is entered, click the blue **"Create Case"** button at the bottom. You will be taken directly to the new case's "Case View" page.



Customizing the "Create Case" Form

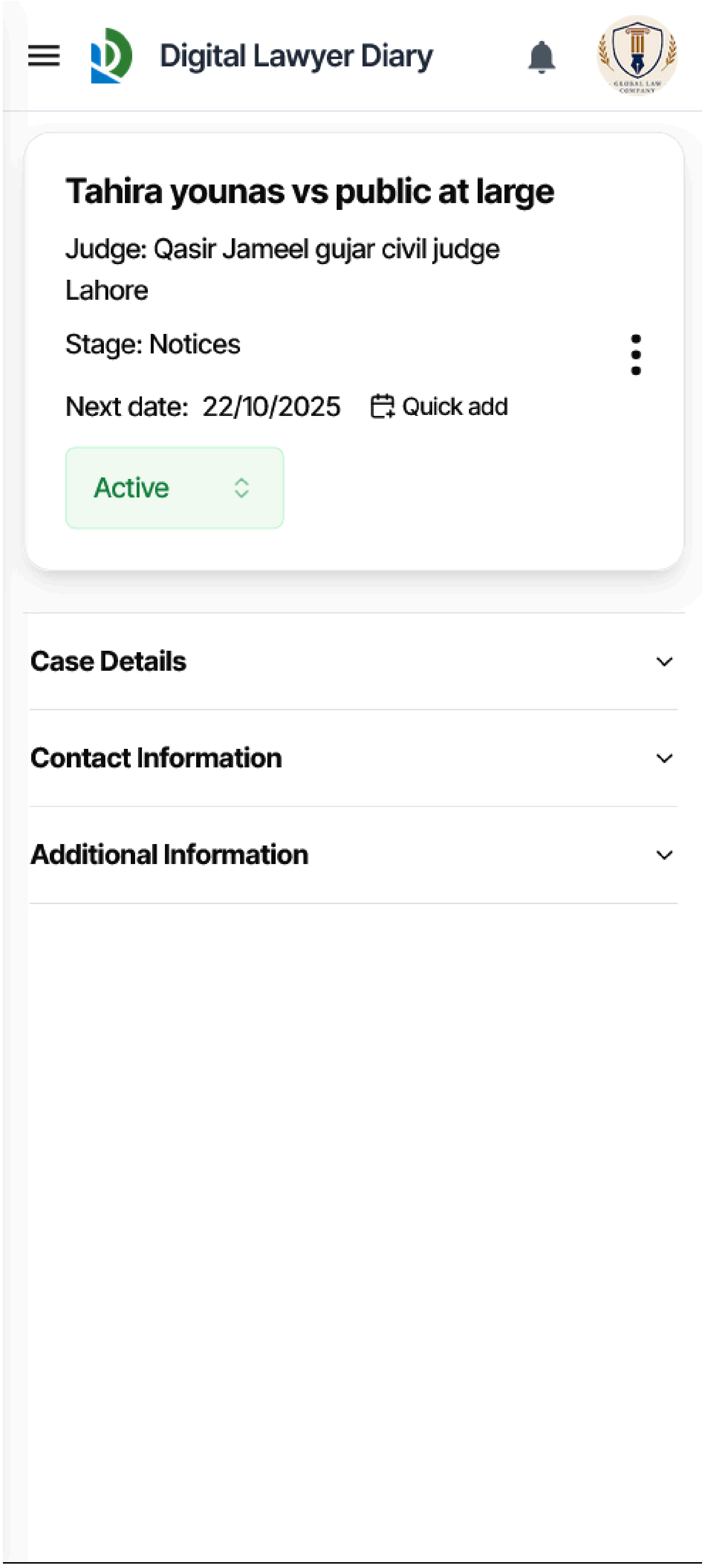
Your practice is unique, and so are your data needs. You can customize the Create Case form to hide fields you don't use.

- **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.**



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.



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

Judge: Qasir Jameel gujar civil judge Lahore

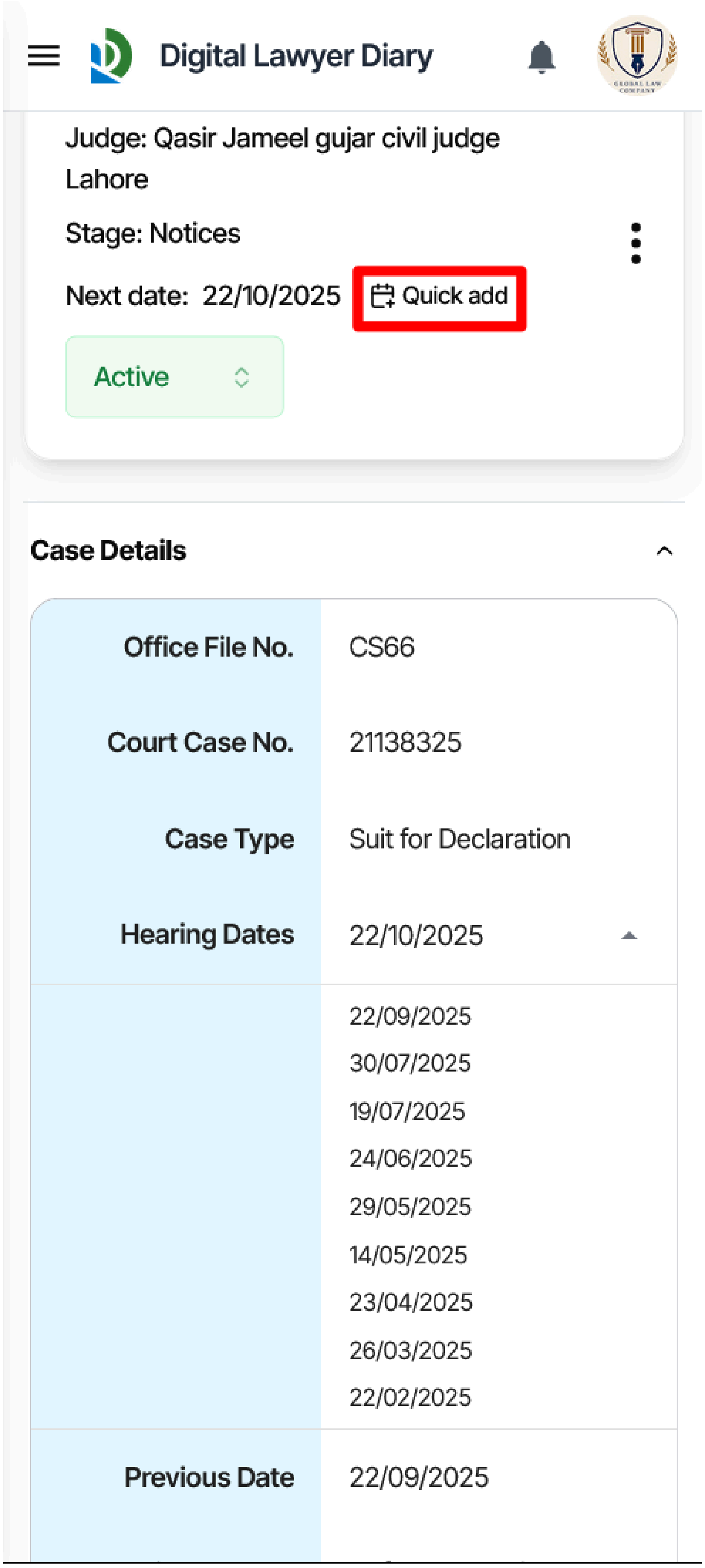
Stage: Notices

Next date: 22/10/2025 Quick add

Active

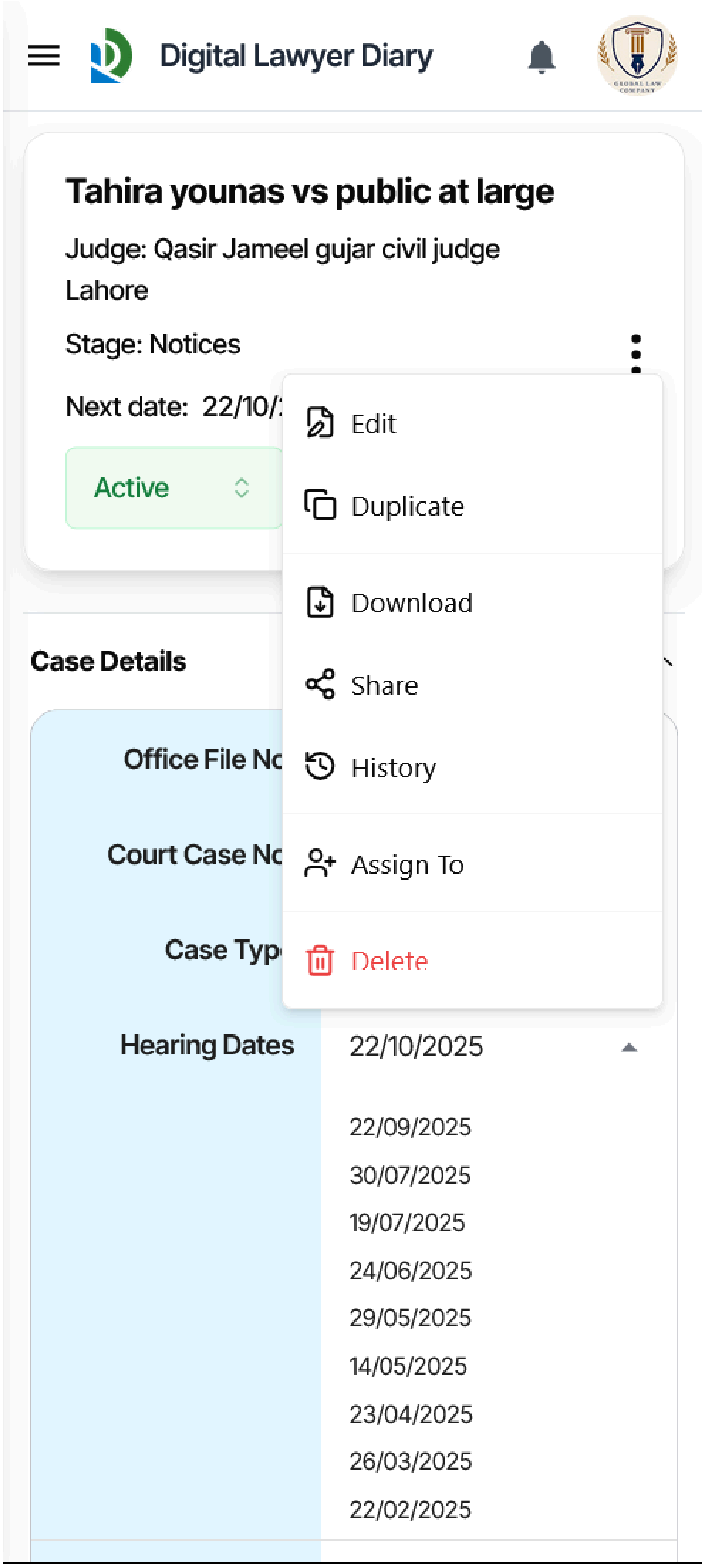
Case Details

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

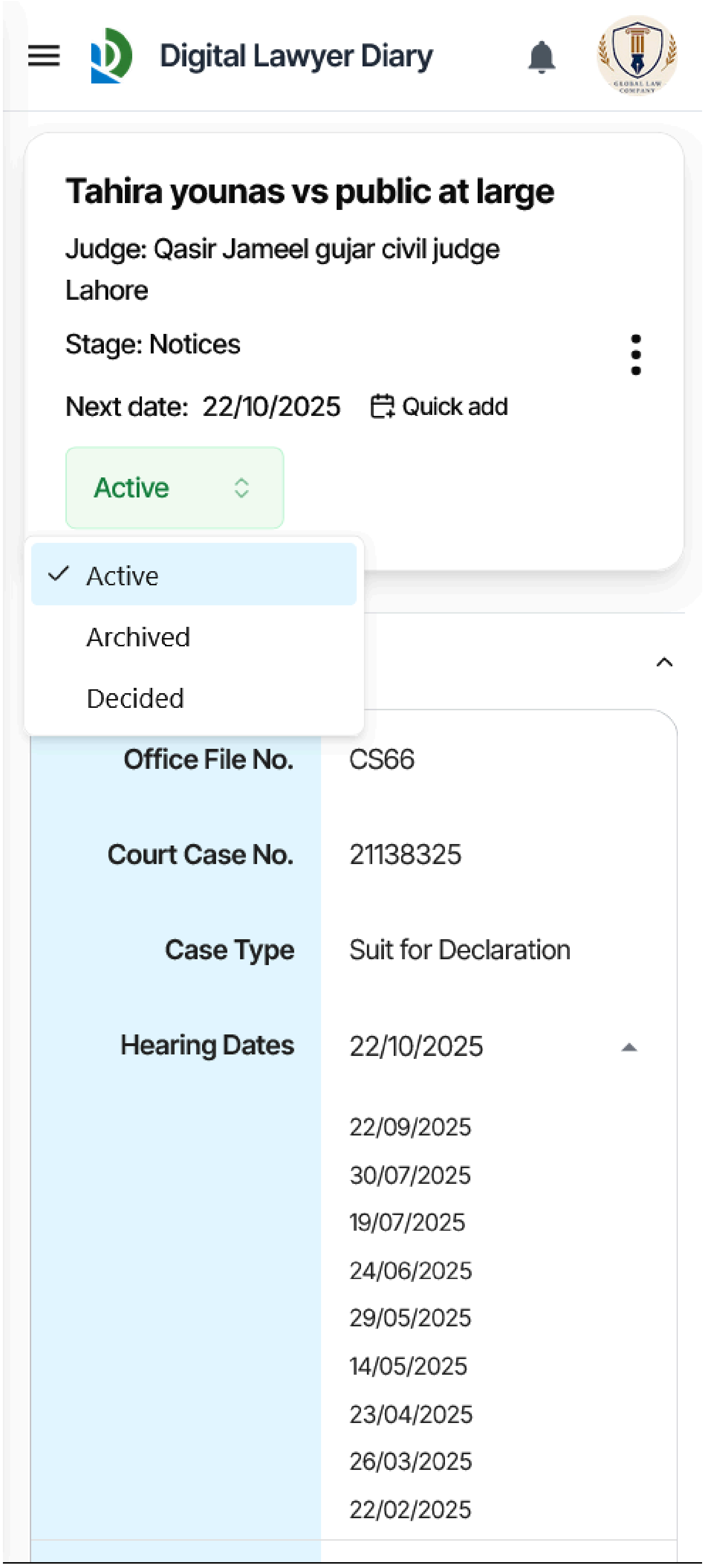
- **Assign To:** Allows you to assign the case to team members within your firm. This enables collaborative case management where multiple lawyers or paralegals can access and update the same case file.

- **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.



To Change the Case Status:

1. **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
2. **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.
3. **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.

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.*

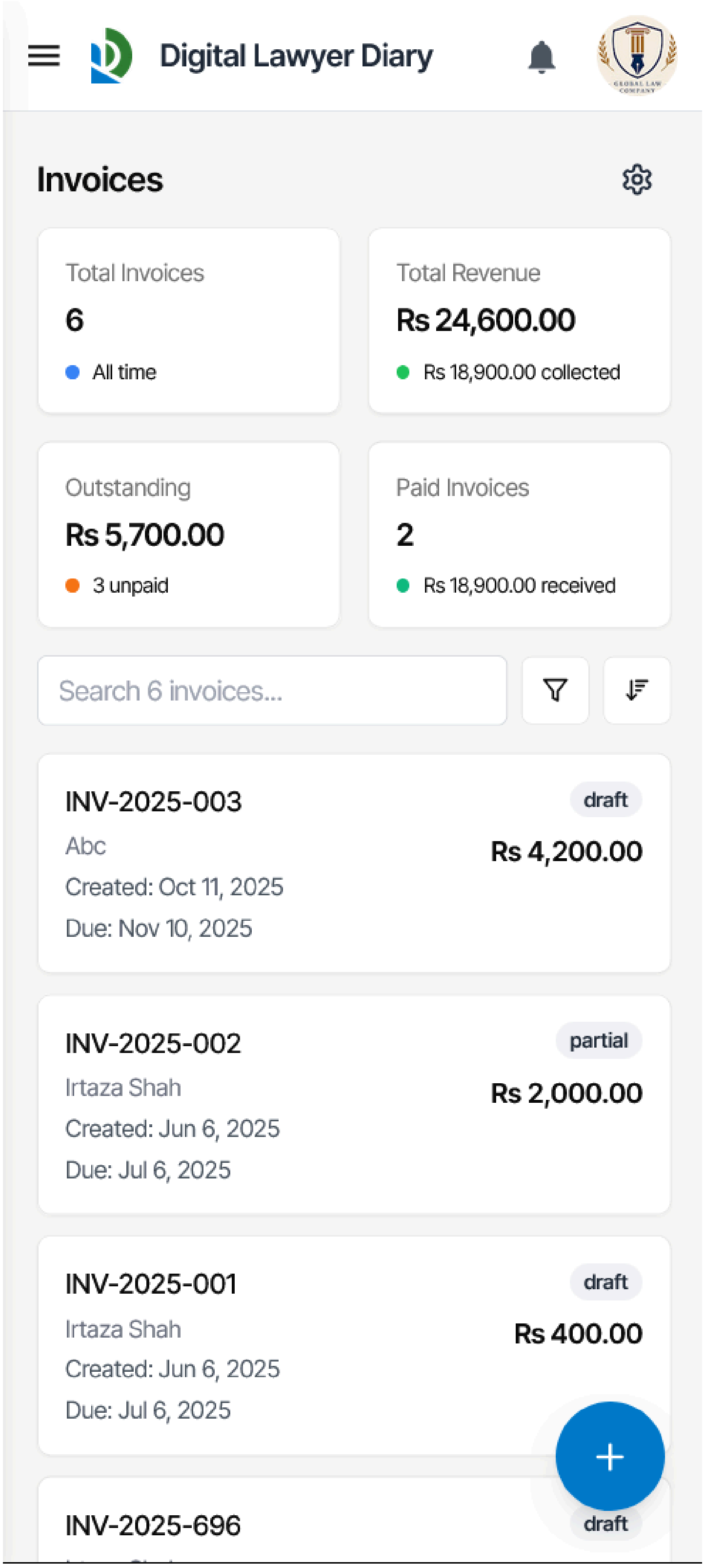
M5. Invoice Management: From Billing to Paid

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:

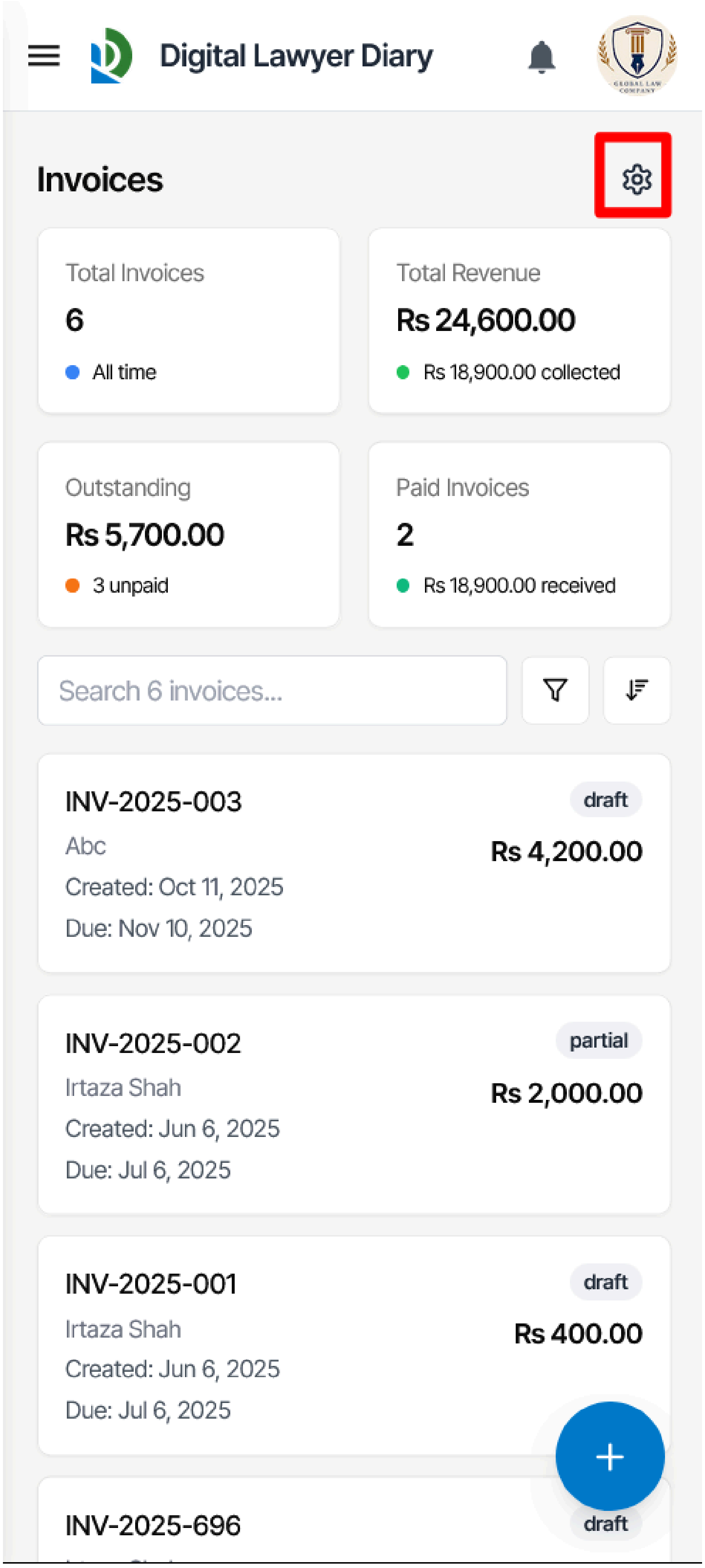
Use the search bar to quickly find invoices by:

- Invoice number
- Client name
- Amount
- Date range

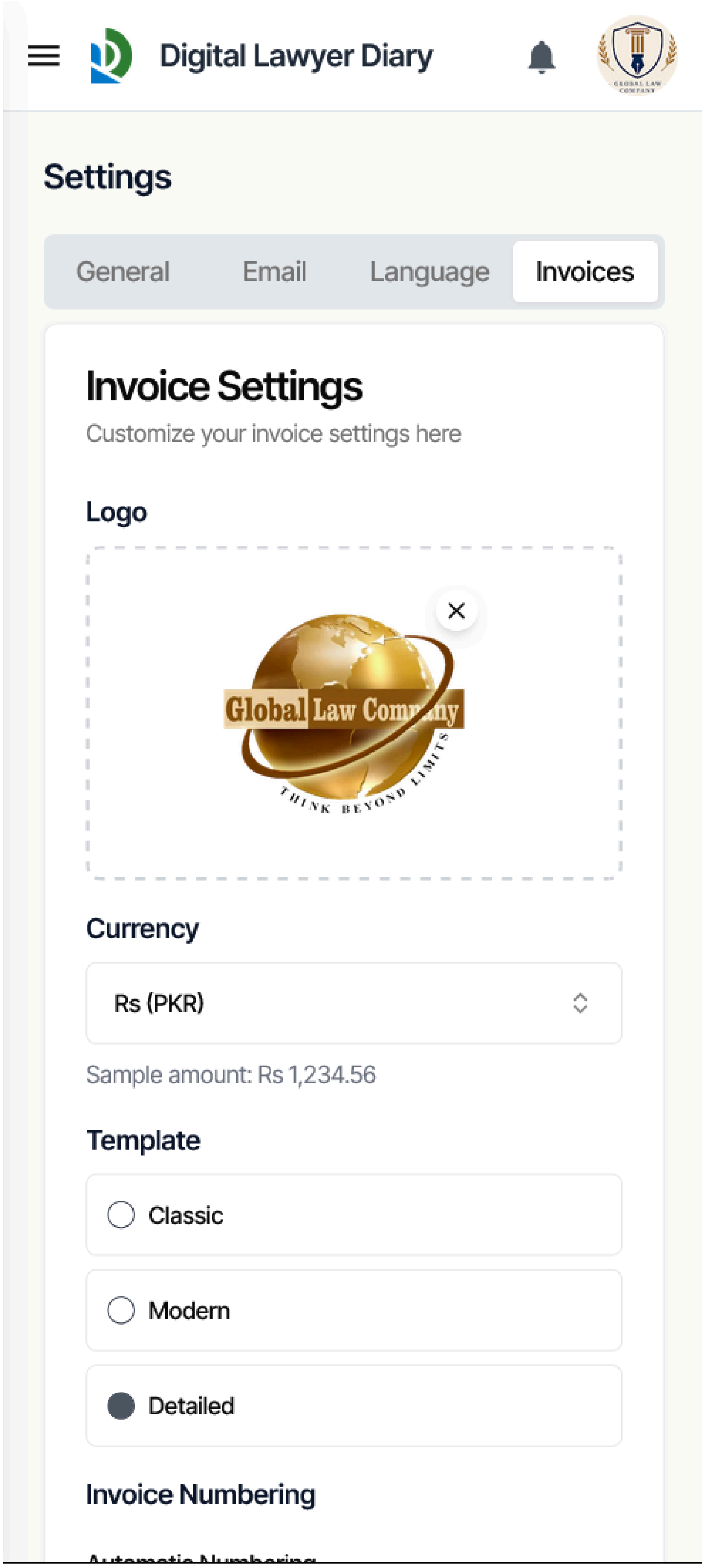
M5.2 Setting Up Your Invoices (First-Time Setup)

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.



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



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

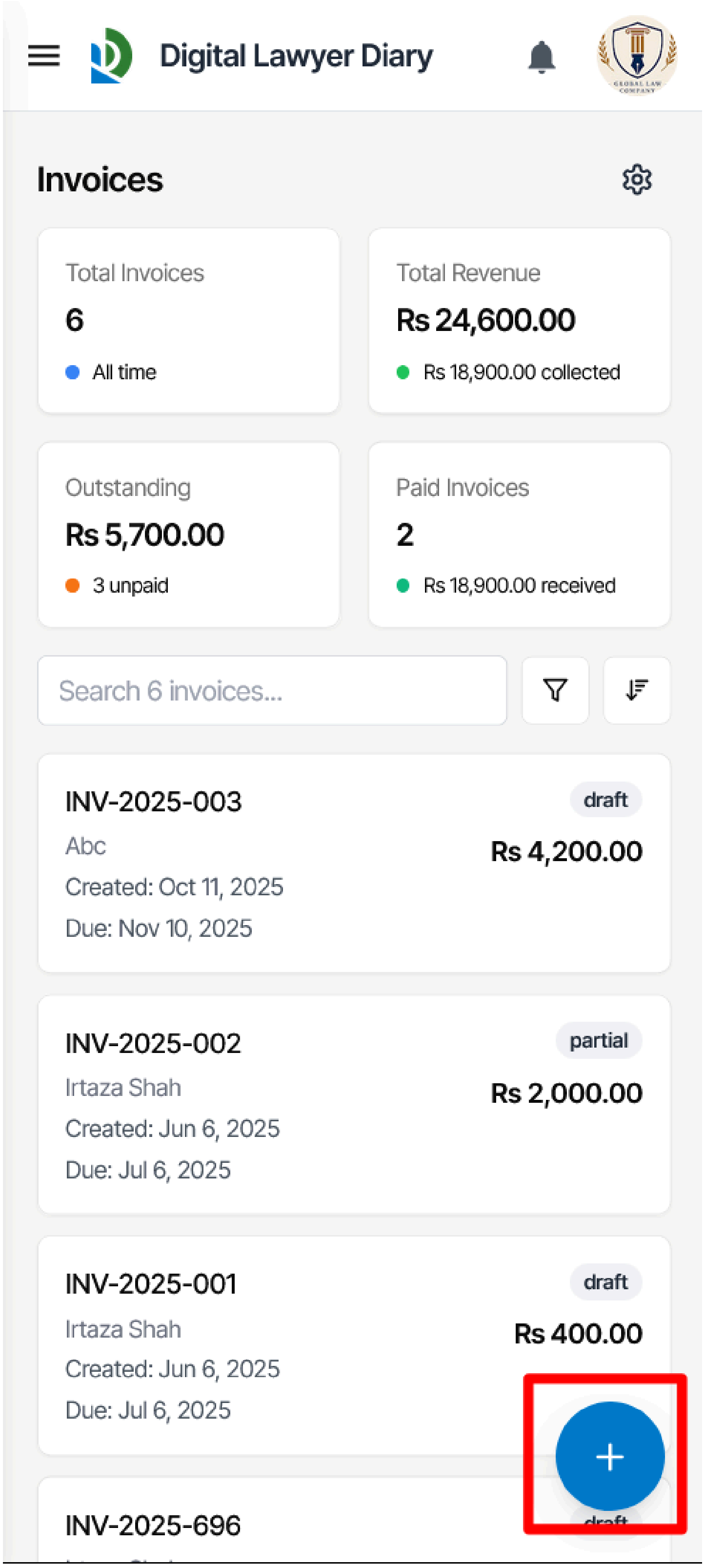
Step 4: Scroll down and tap **"Save Changes"** to apply your settings.

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.

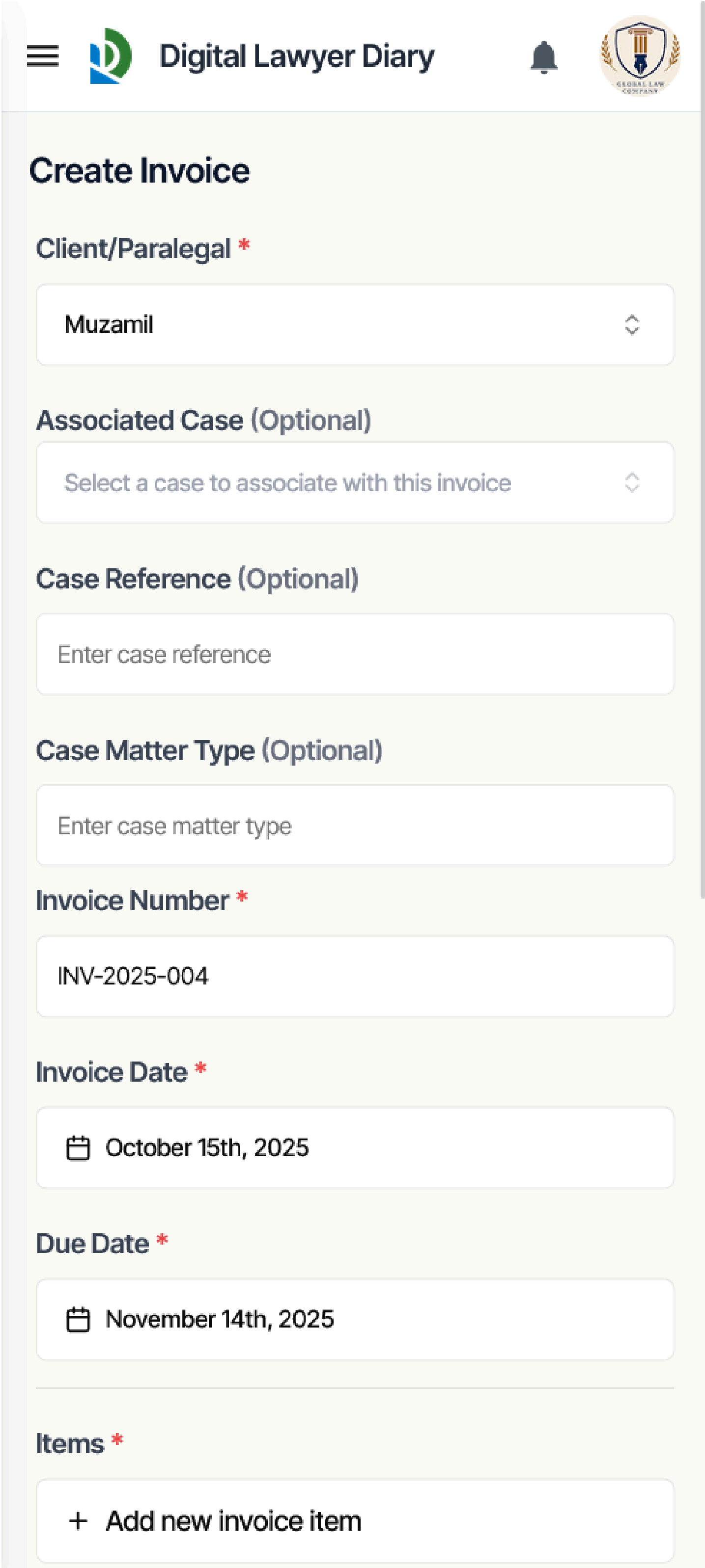
Step 1: From the Invoice Dashboard, tap the blue **`"+"` (Plus) button** in the bottom-right corner.



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:



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):

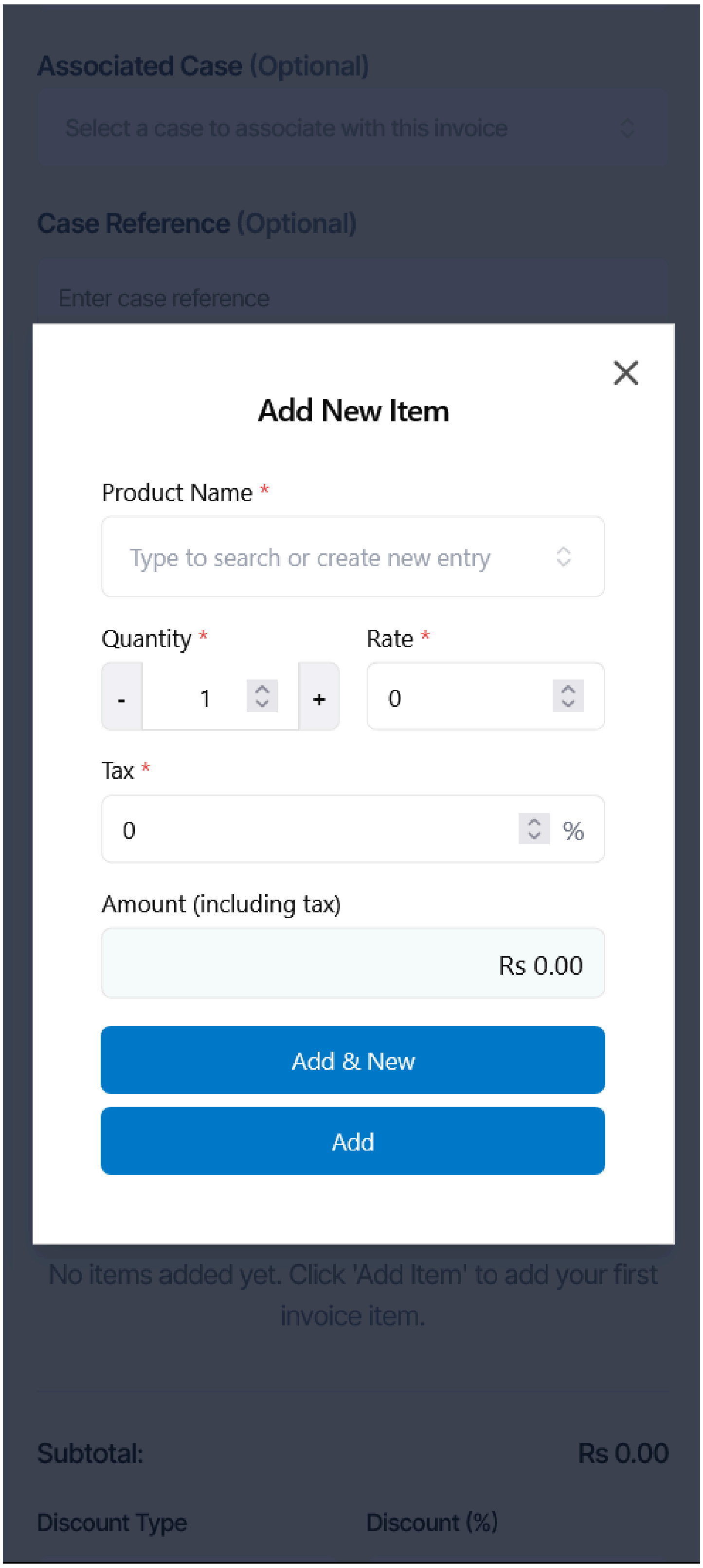
- Tap the calendar icon to select the issue date
    - Defaults to today's date
    - Example: October 15th, 2025
- **Due Date** (Required):
    - Tap the calendar icon to select the payment due date
    - Calculates automatically based on your payment terms
    - Example: November 14th, 2025

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.



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):**

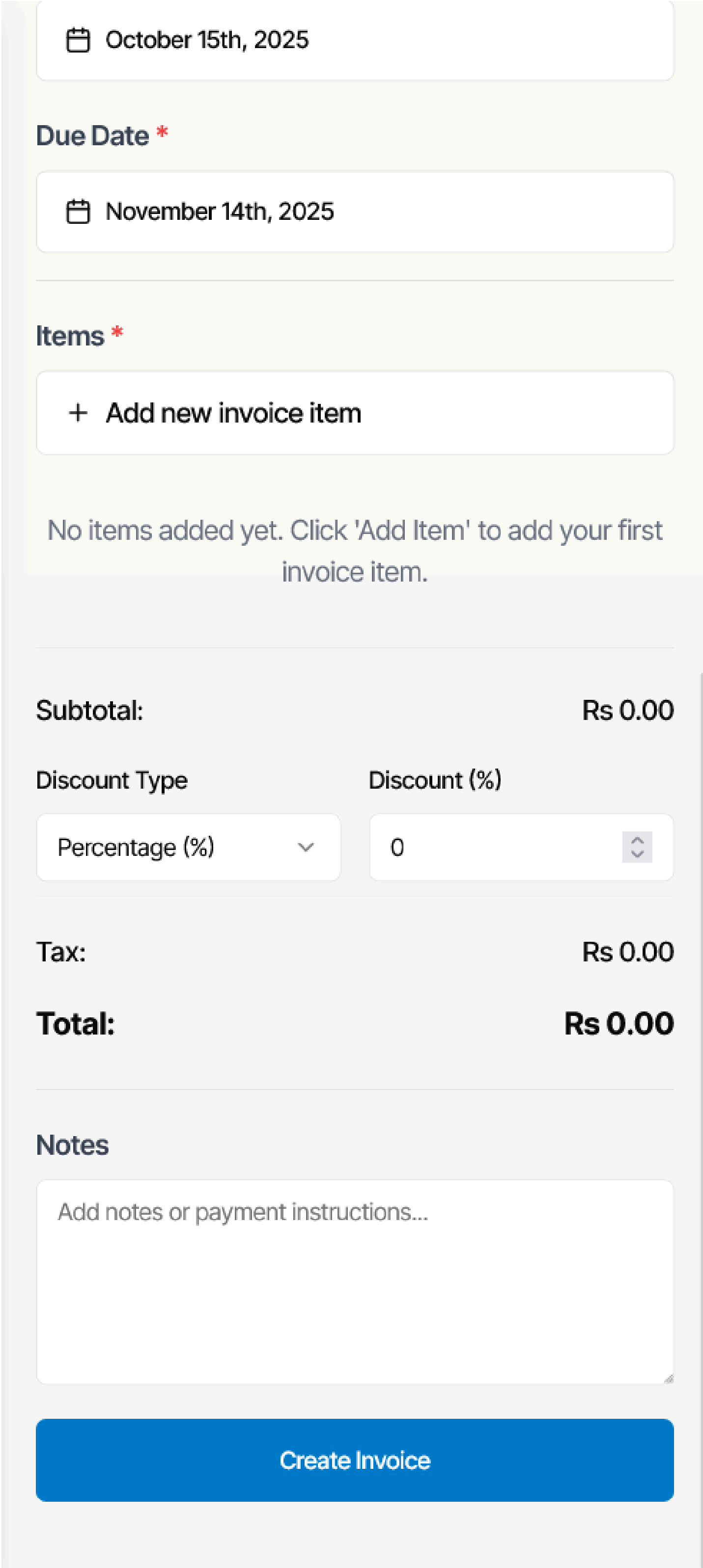
  - Automatically calculated field (read-only)
  - Formula: (Quantity × Rate) + Tax
  - Updates in real-time as you adjust values
  - Example: Rs 0.00 (updates after entering values)

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:



- **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:

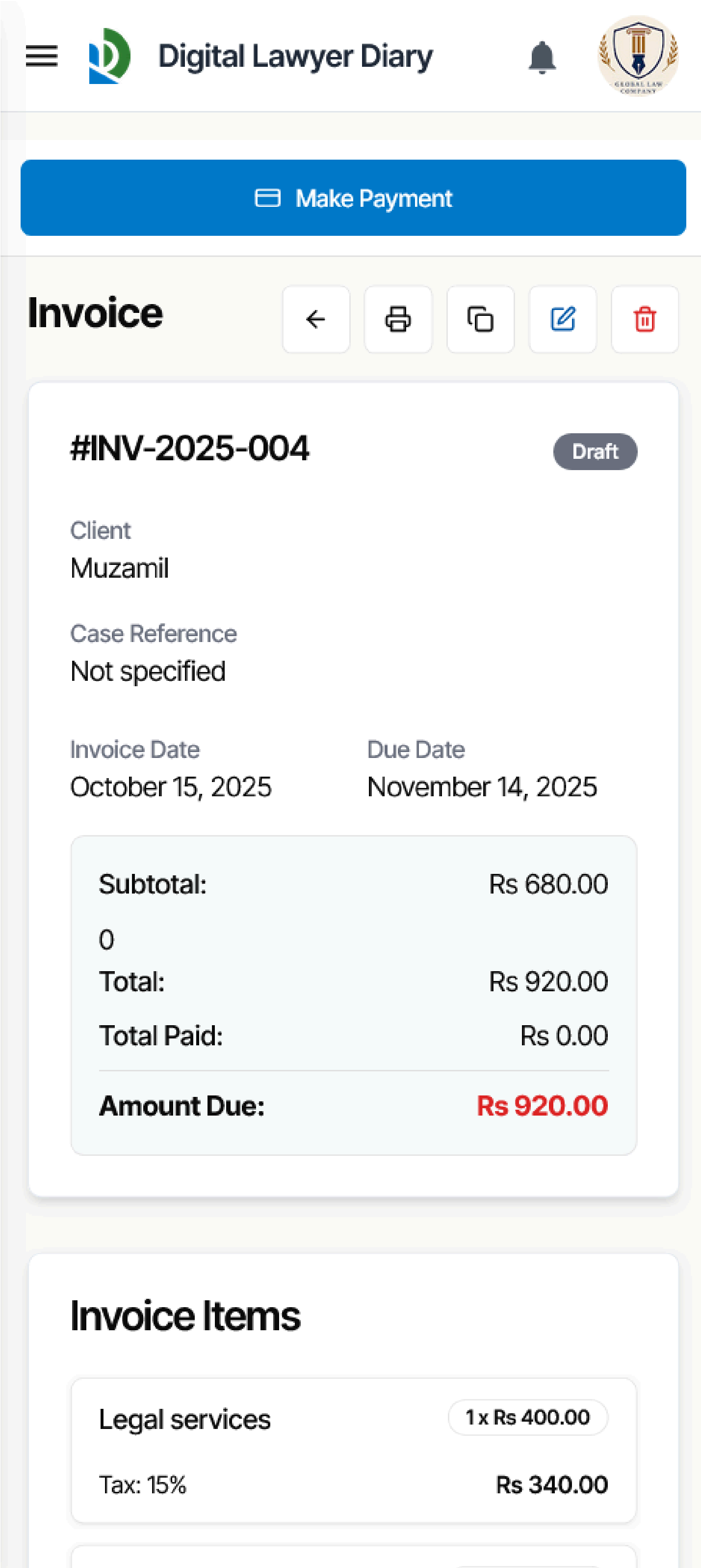
1. Scroll to the bottom of the form
2. Tap the blue **"Create Invoice"** button
3. The invoice is saved and you'll be taken to the Invoice View page

> 💡 ***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.

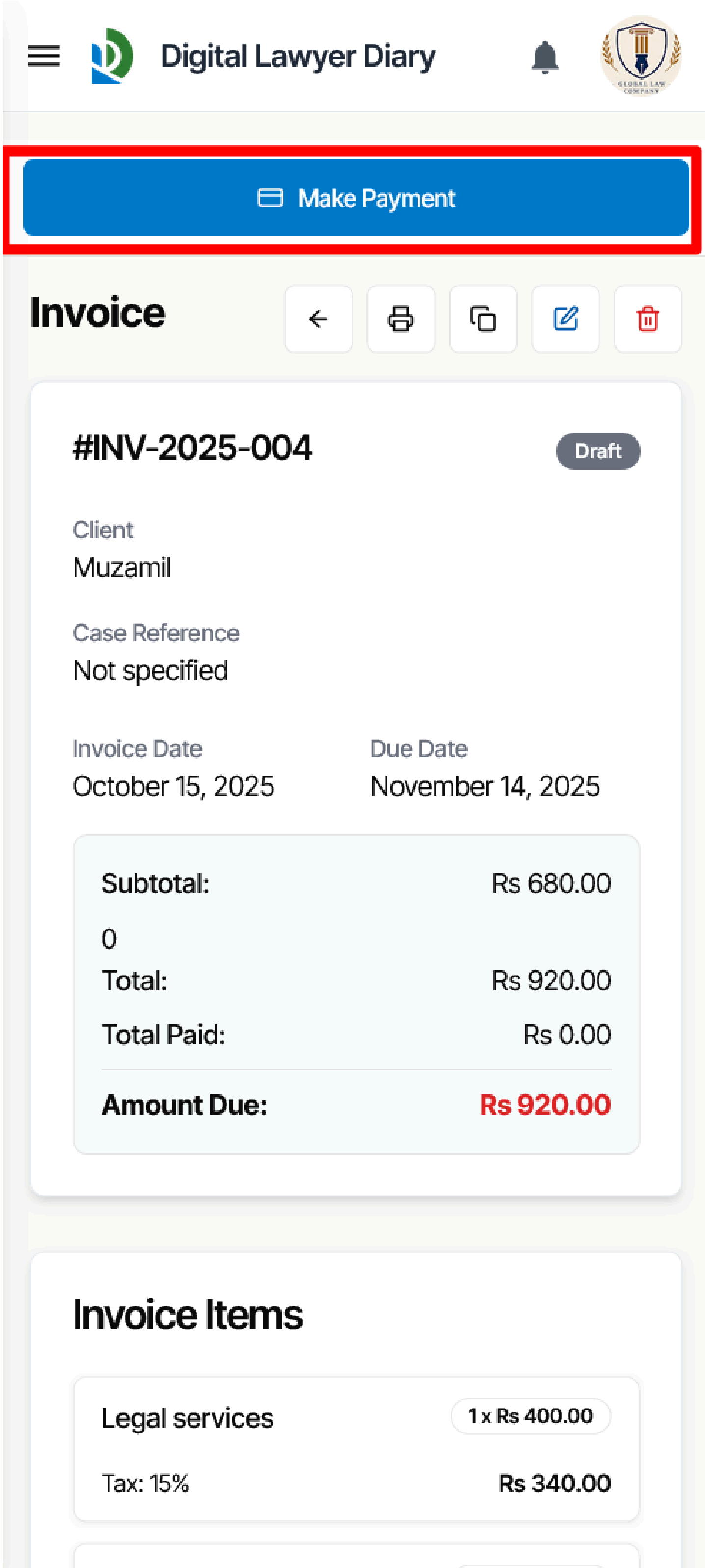


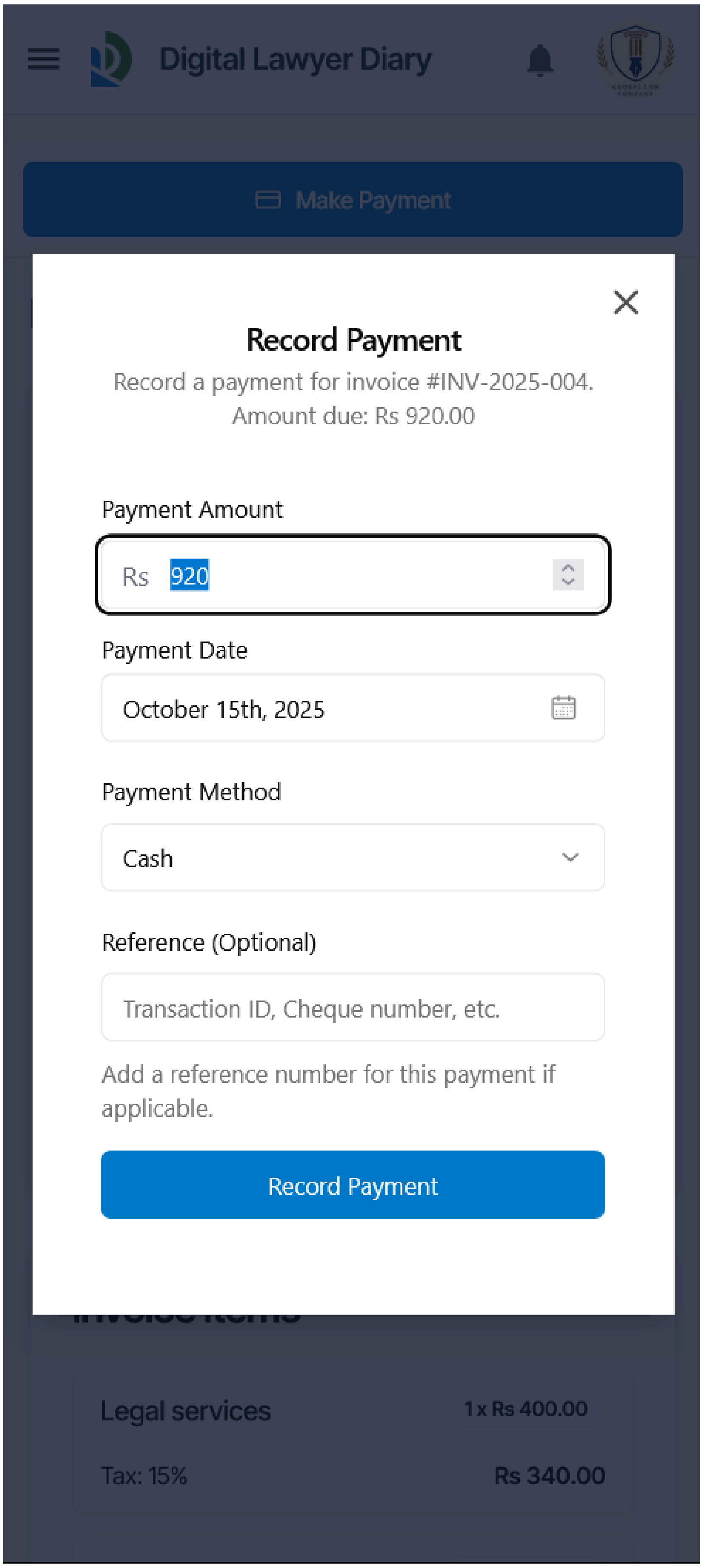
Key Features:

- **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
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



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

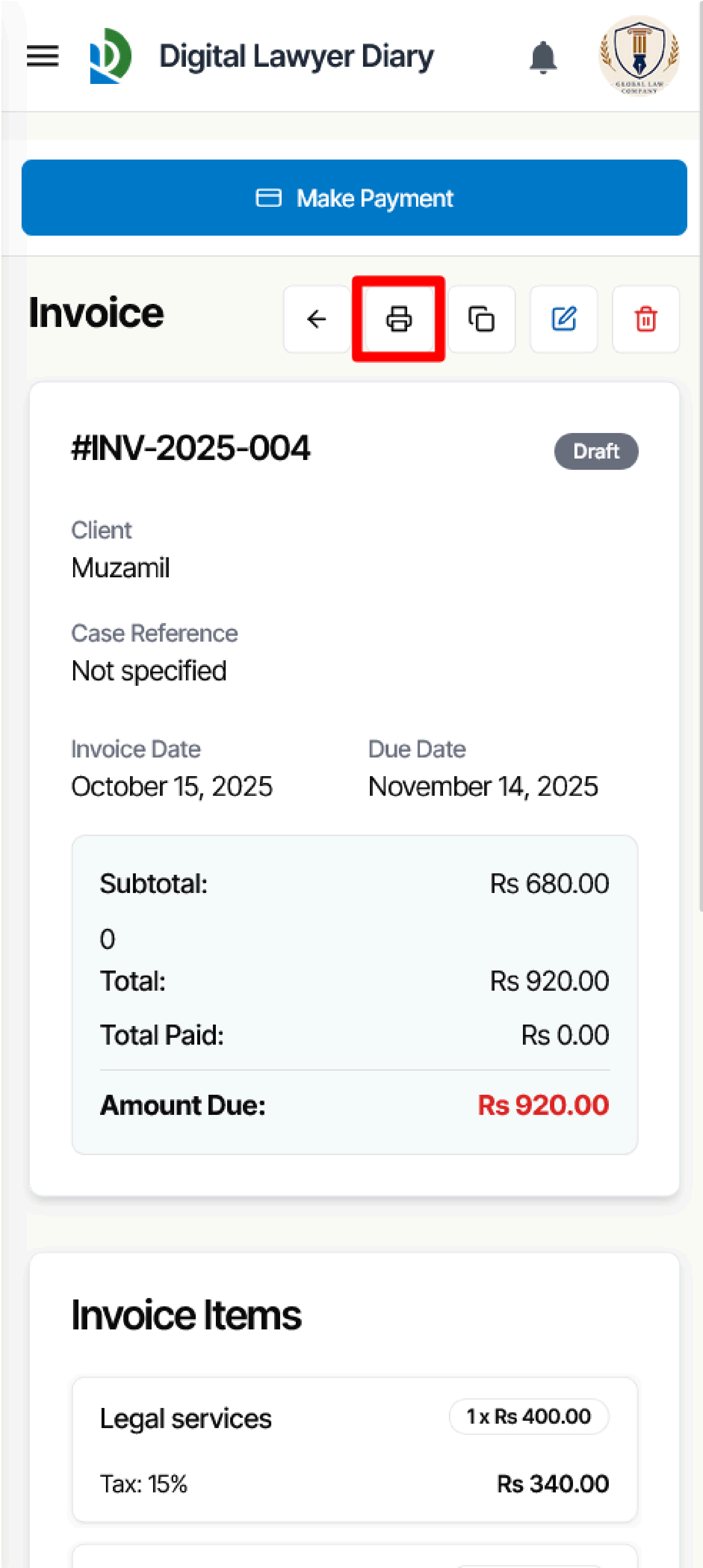
- Enter the **Payment Amount**. You can enter a partial amount or the full amount.
- Select the **Payment Date** and **Payment Method** (e.g., Cash, Bank Transfer).
- Add an optional **Reference** number (like a check number or transaction ID).
- Click **"Record Payment"**.

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.



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

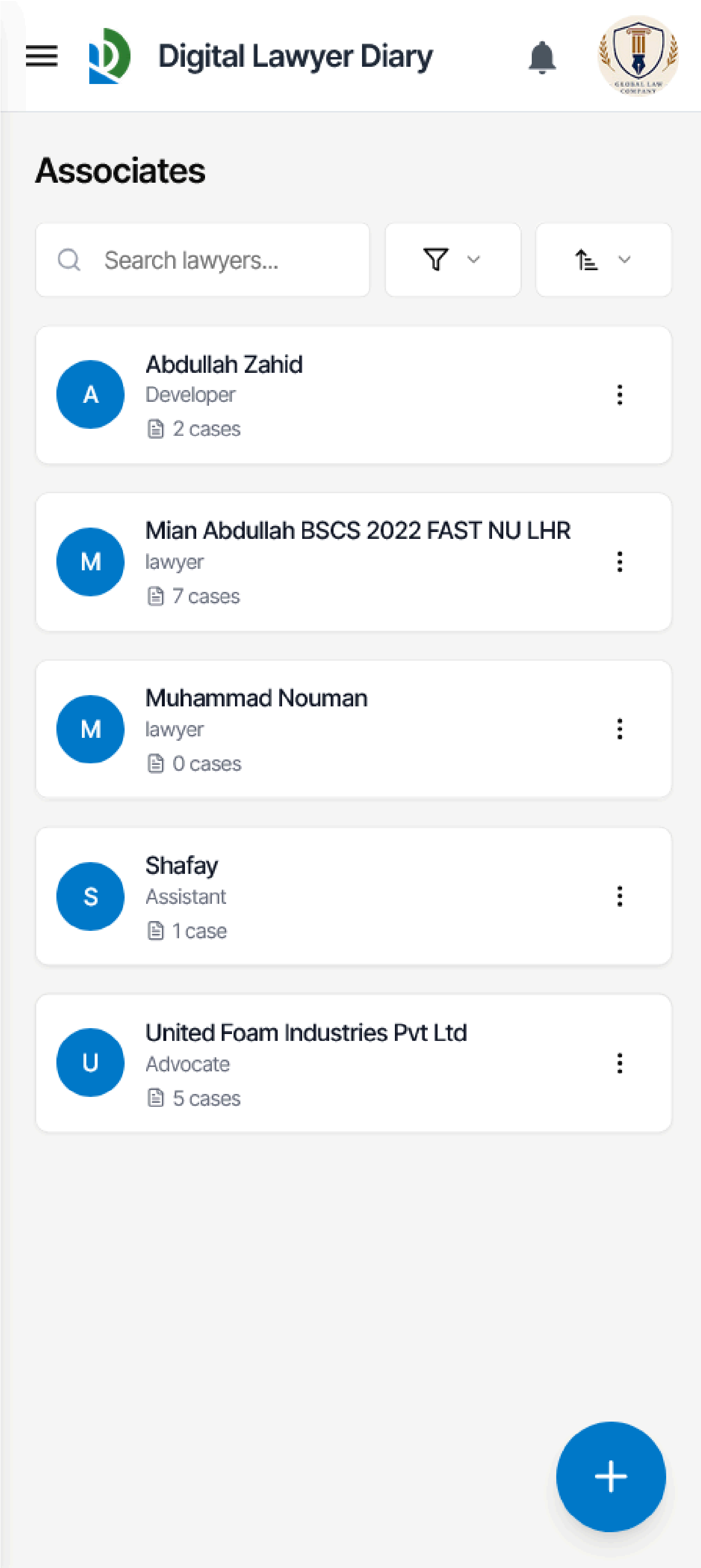
M6. Managing Your Team: The Associates Module

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:



- **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.

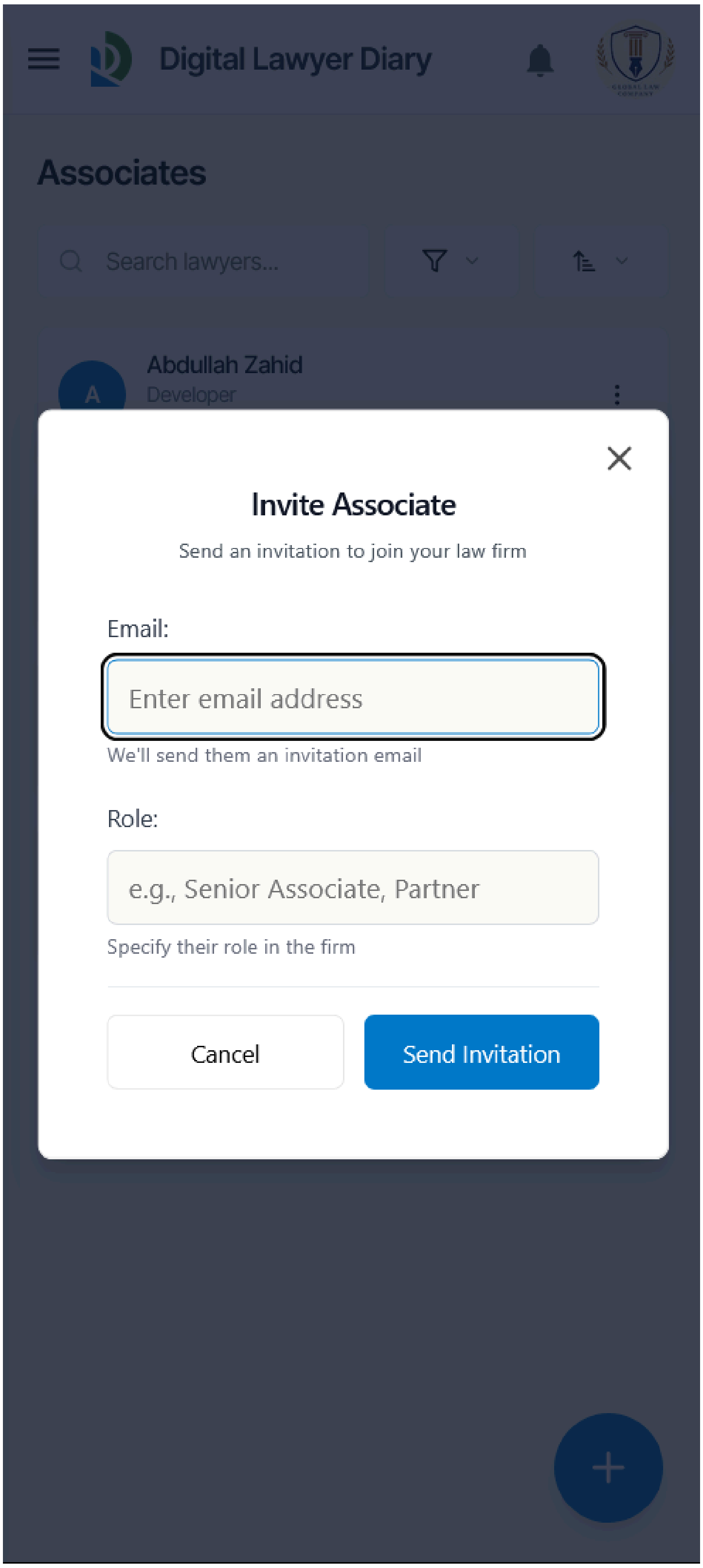
M6.2 Inviting a New Associate

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.

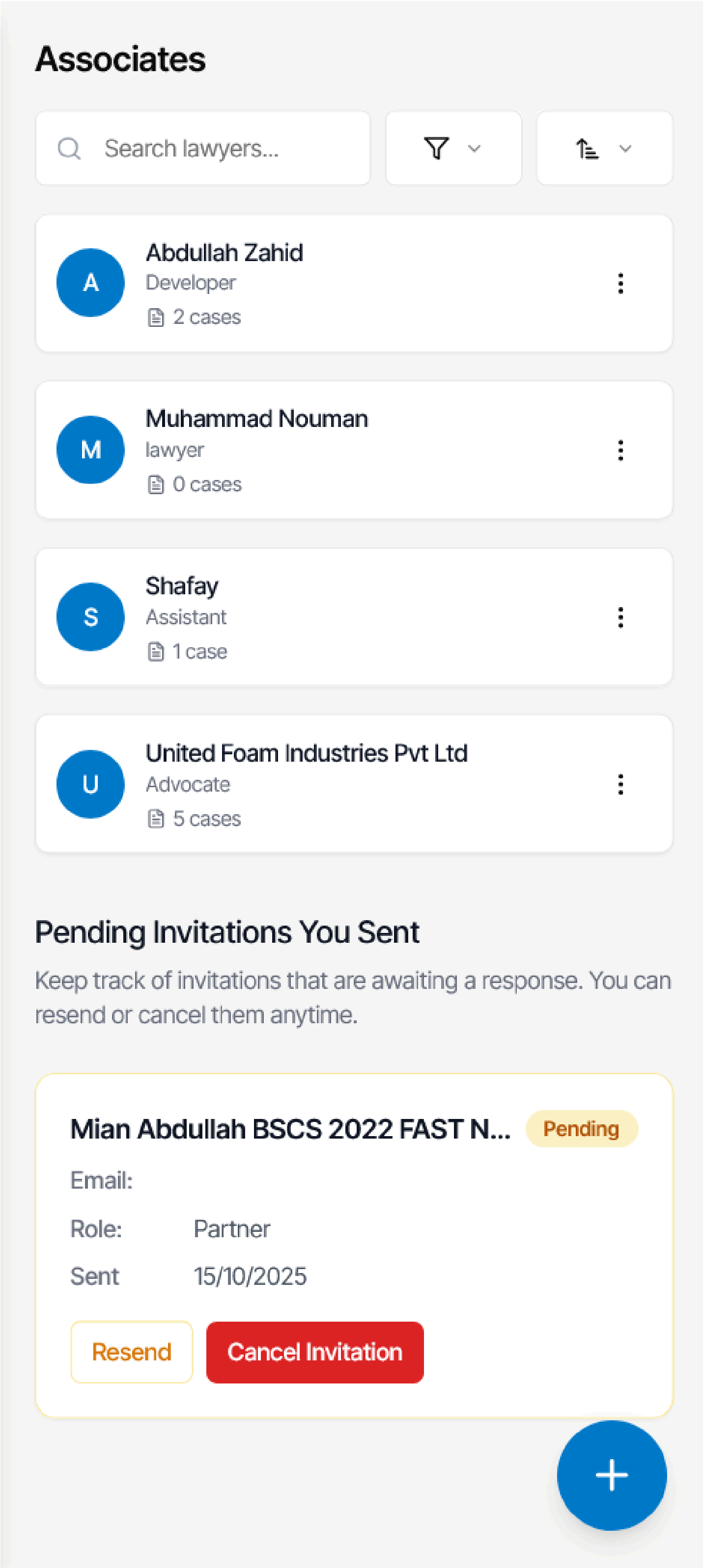


> ***What happens next?*** *The system clearly explains the process: The person you invite will receive an email and a notification within their own Digital Lawyer Diary account. They will appear in your "Pending" list until they accept.*

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.



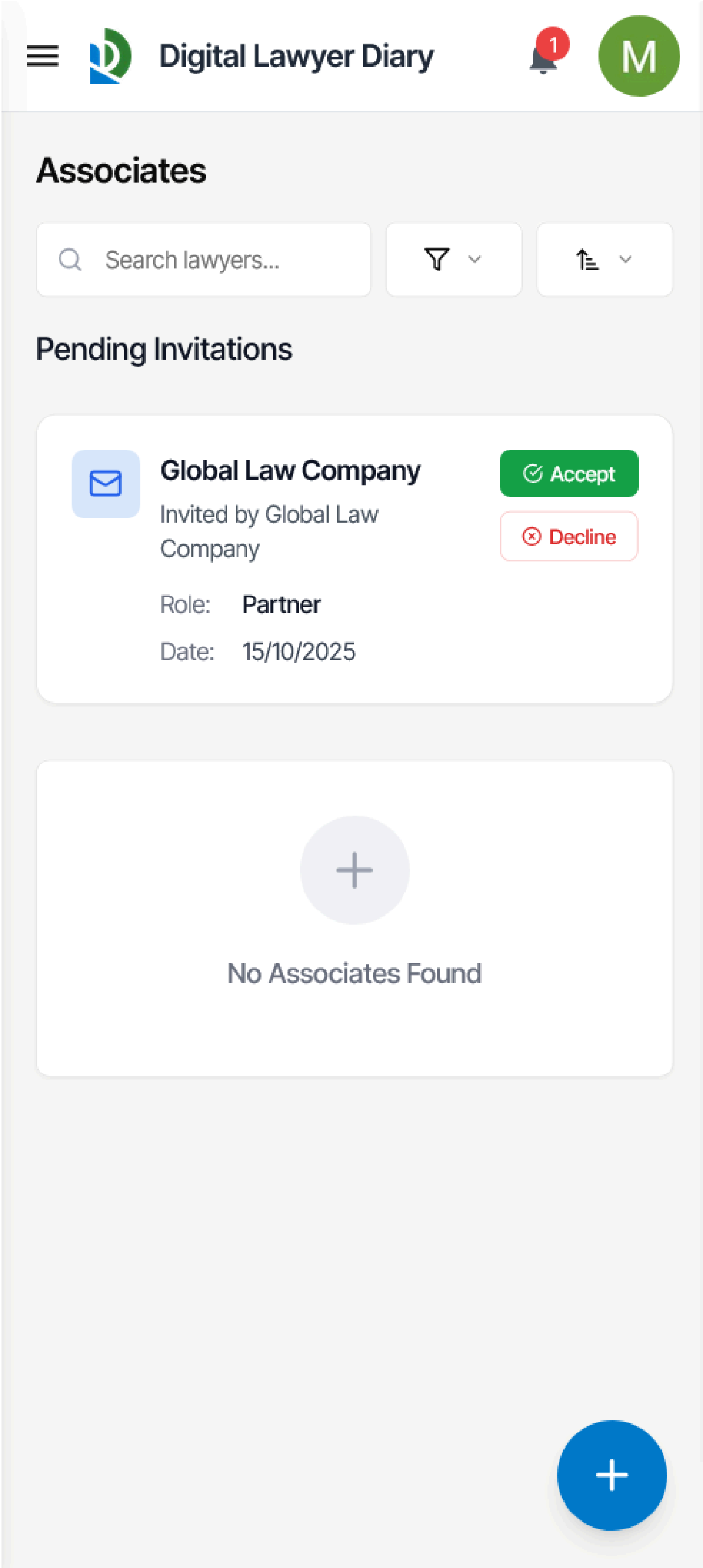
This card shows the invitee's email, their assigned role, and a "Pending" status. You have two options here:

- **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.

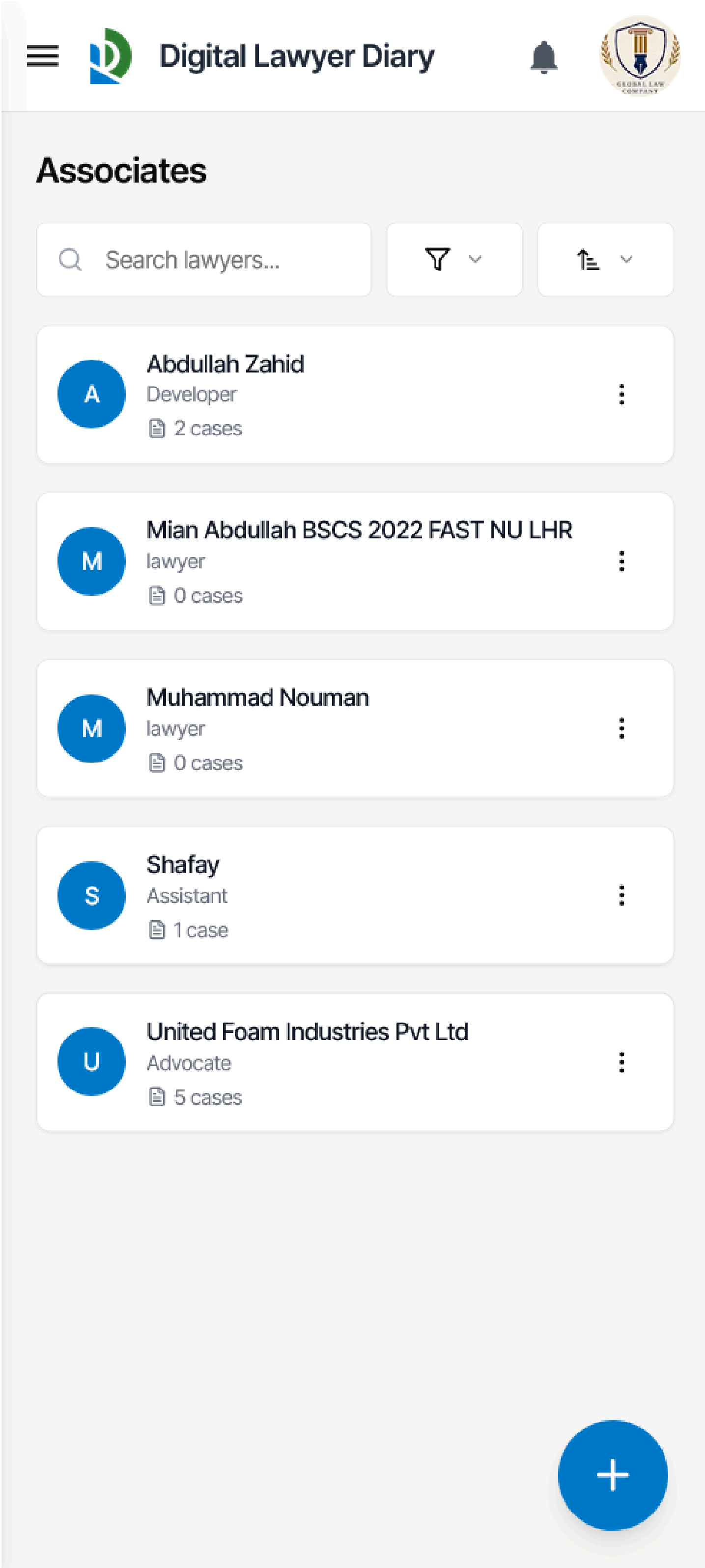


They have two choices:

- **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.



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.

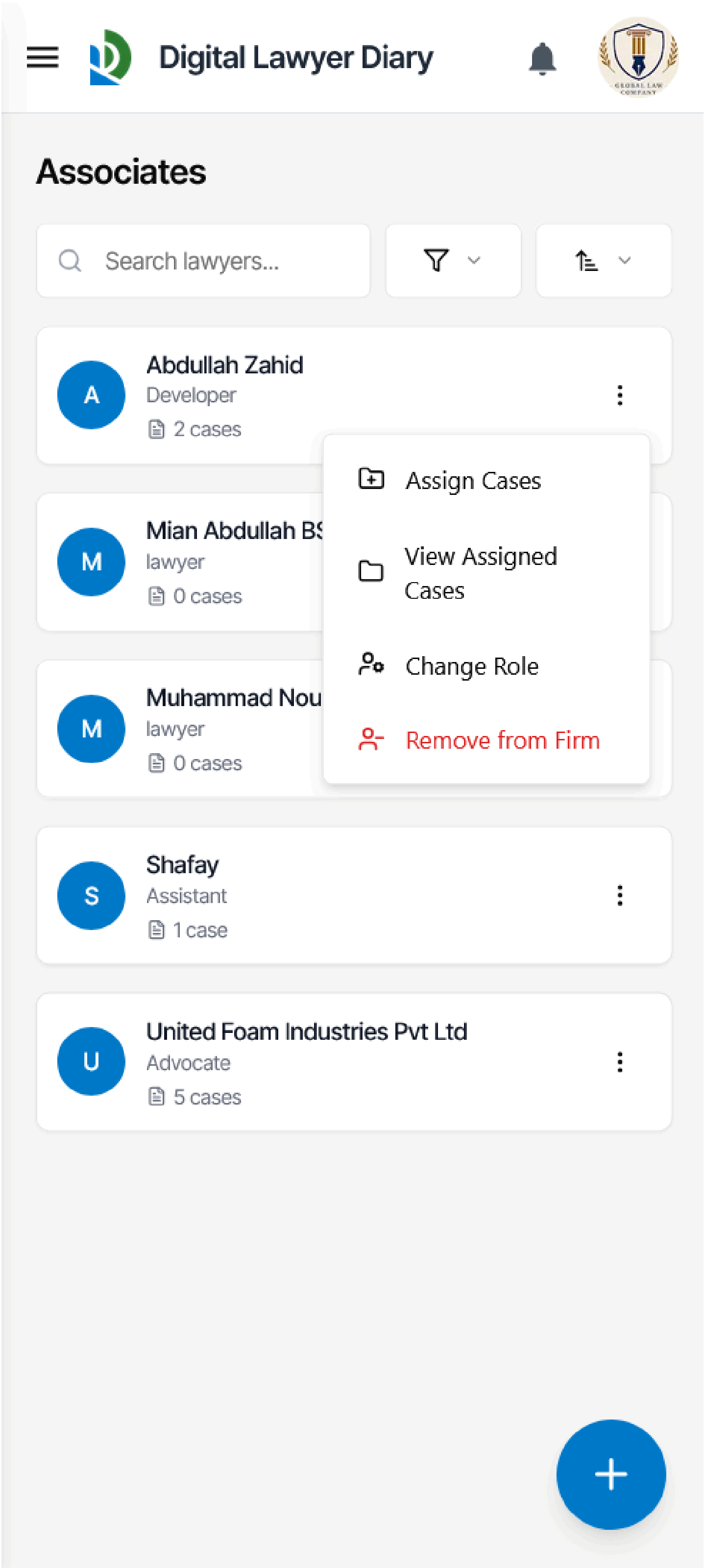
M6.6 Assigning and Reviewing Cases

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

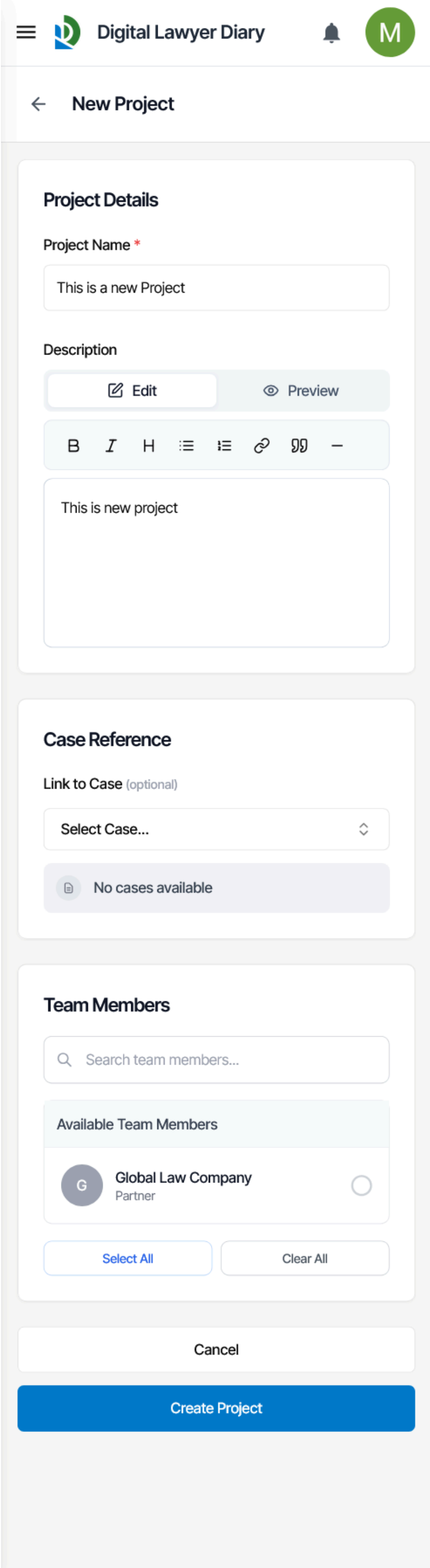
While the "Cases" module is perfect for litigation and court-related matters, the **Projects** module offers a flexible and powerful way to manage any set of tasks with a defined workflow. This is ideal for internal firm initiatives, complex client matters that aren't in litigation (like a large merger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



- **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

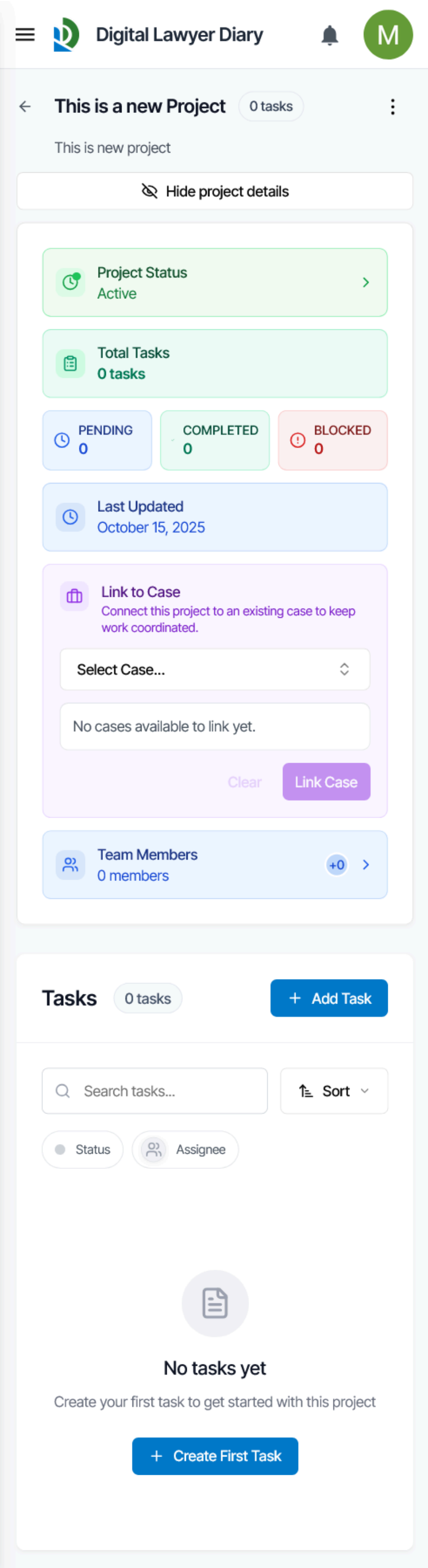
- **Case Reference:**
    - **Link to Case:** (Optional) If this project is directly related to a formal case in your system, you can select it from the dropdown to link them for easy cross-referencing. If you don't have any cases yet, you'll see "No cases available."
- **Team Members:**
    - **Search 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.

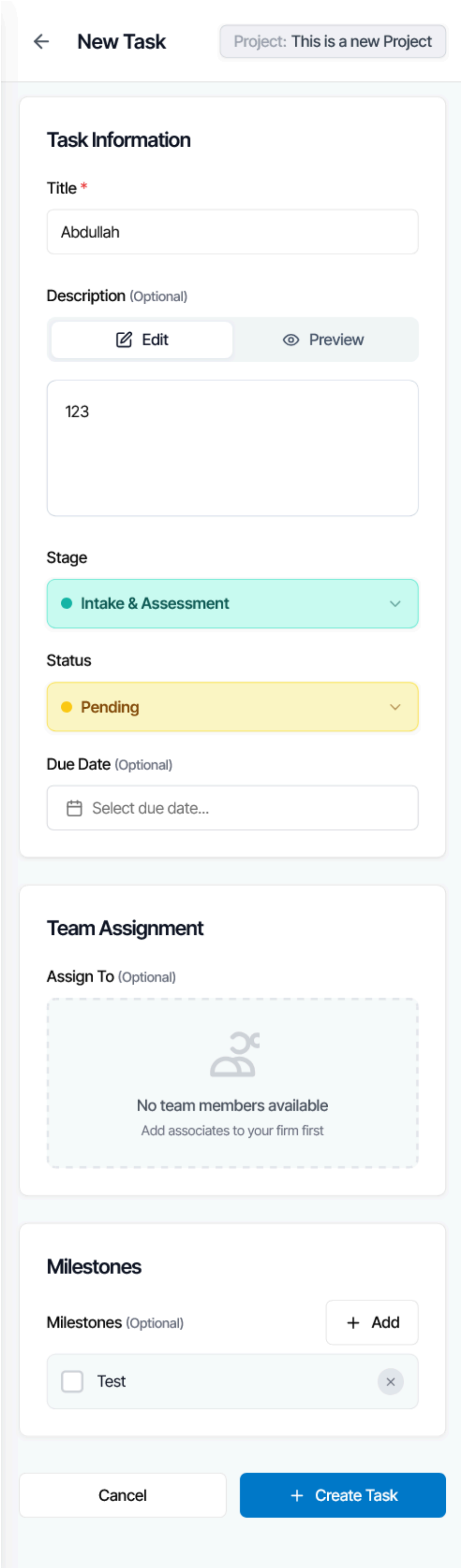
M7.3 Managing Project Tasks

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:



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

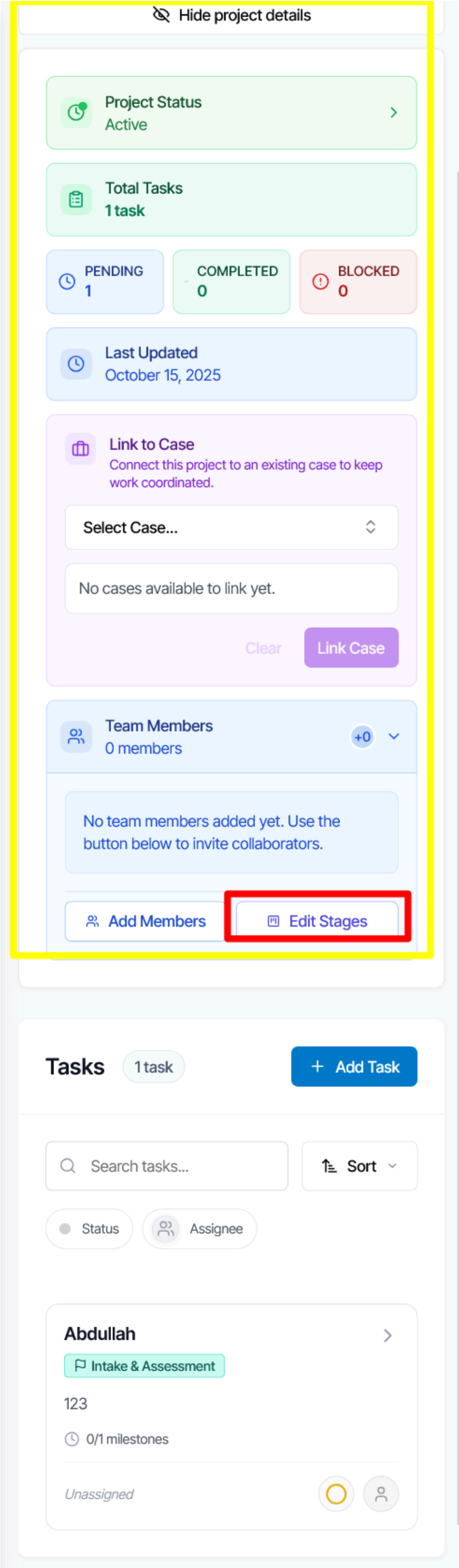
Every project is different. A contract review has a different workflow than a property acquisition. Your Digital Diary allows you to **customize the workflow stages for each project individually** without affecting any other project.

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

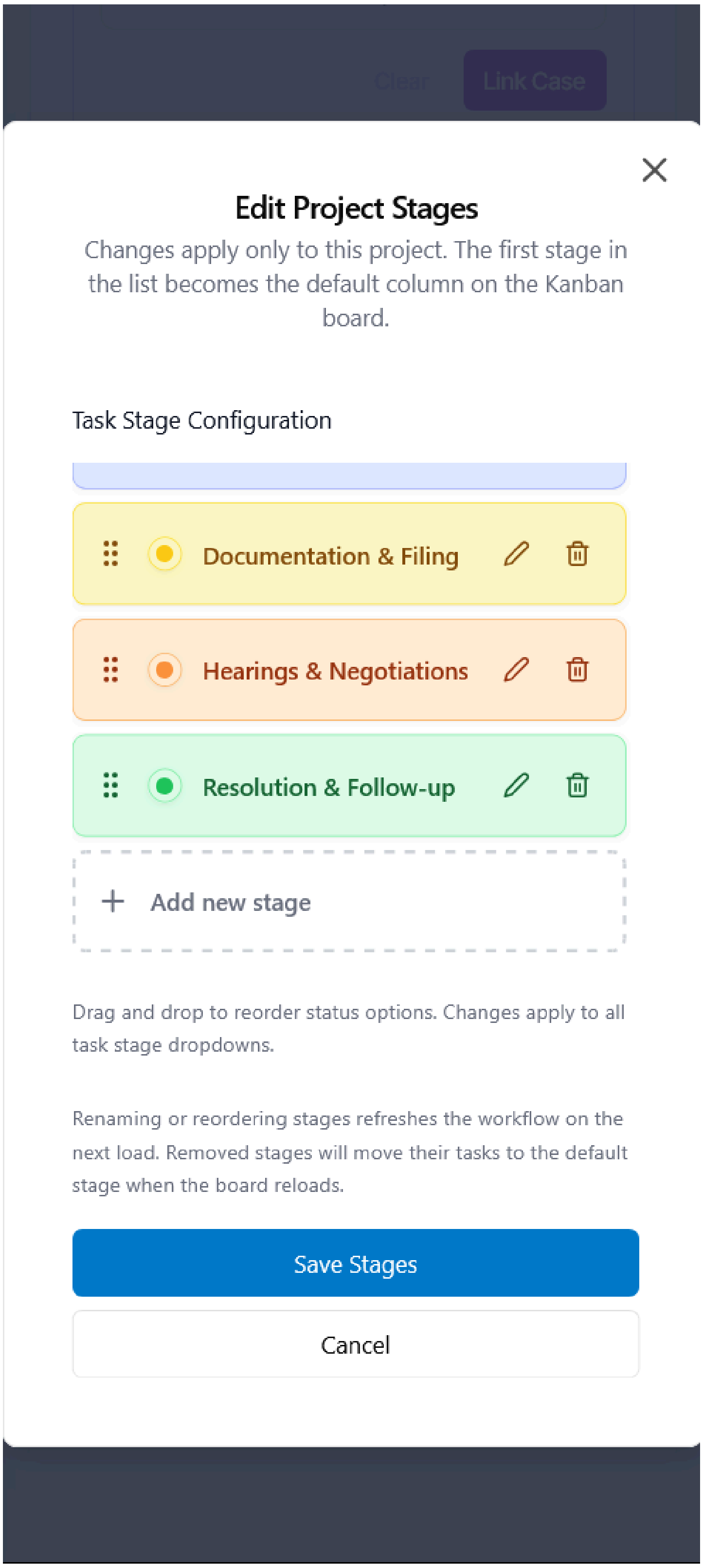
- **Intake & Assessment** - Initial client consultation and case evaluation
- **Documentation & Filing** - Preparing and filing necessary documents
- **Hearings & Negotiations** - Court proceedings and settlement discussions
- **Resolution & Follow-up** - Final resolution and post-case activities

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:



- **Reorder Stages:** Drag and drop the stages using the handle (⠿) icon to match your real-world process. The first stage in the list becomes the default column on the Kanban board.
- **Edit a Stage:** Click the **pencil icon** (✏️) to rename a stage or change its color. Each stage can have a distinct color for easy visual identification:
    - Yellow - typically for initial/preparation phases
    - Orange - for active work phases
    - Green - for completion/resolution phases
- **Delete a Stage:** Click the **trash icon** (🗑️) to remove a stage you don't need.
- **Add a New Stage:**
    1. Click **"+ Add new stage"** at the bottom of the stage list.
    2. In the "Create New Status" pop-up, give your new stage a **Name** and select a **Color**.
    3. Click **"Create Stage"**.

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.