LAWYERS OFFICE MANAGEMENT SYSTEM

LOMS

USER MANUAL

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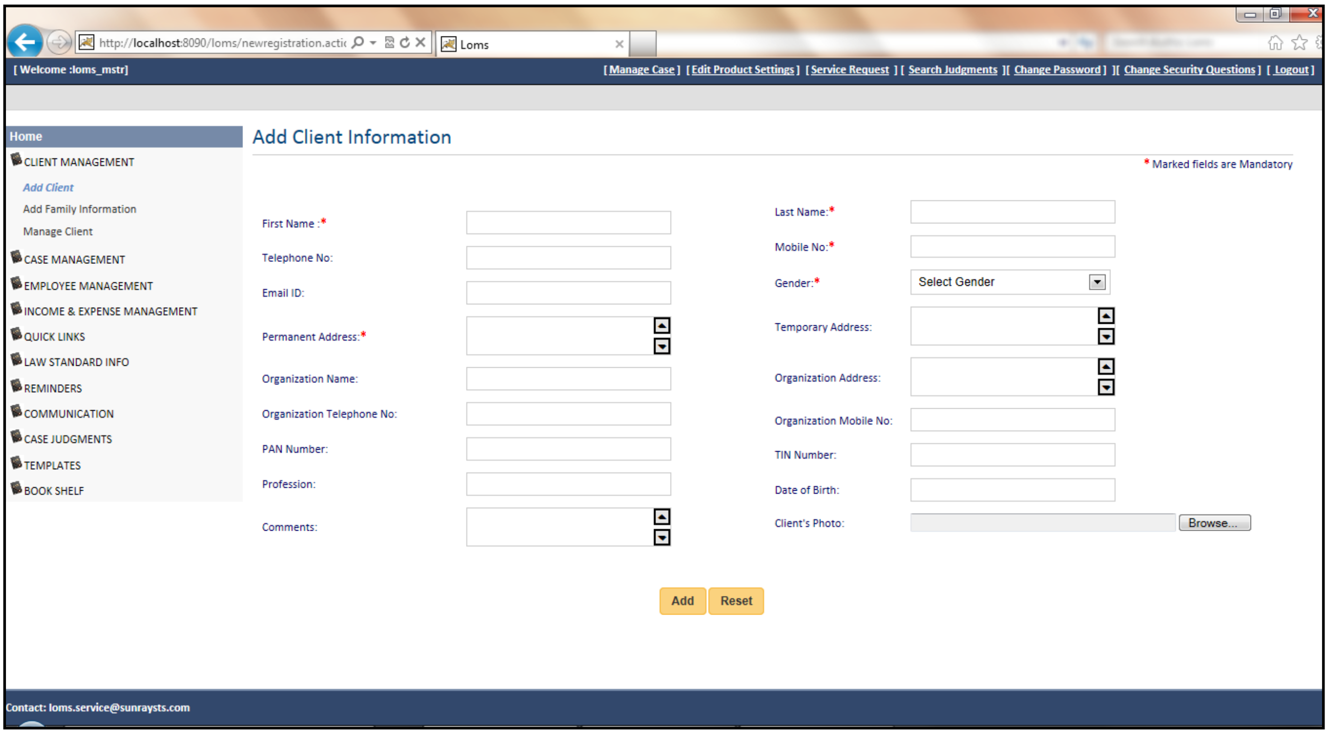
1. CLIENT MANAGEMENT

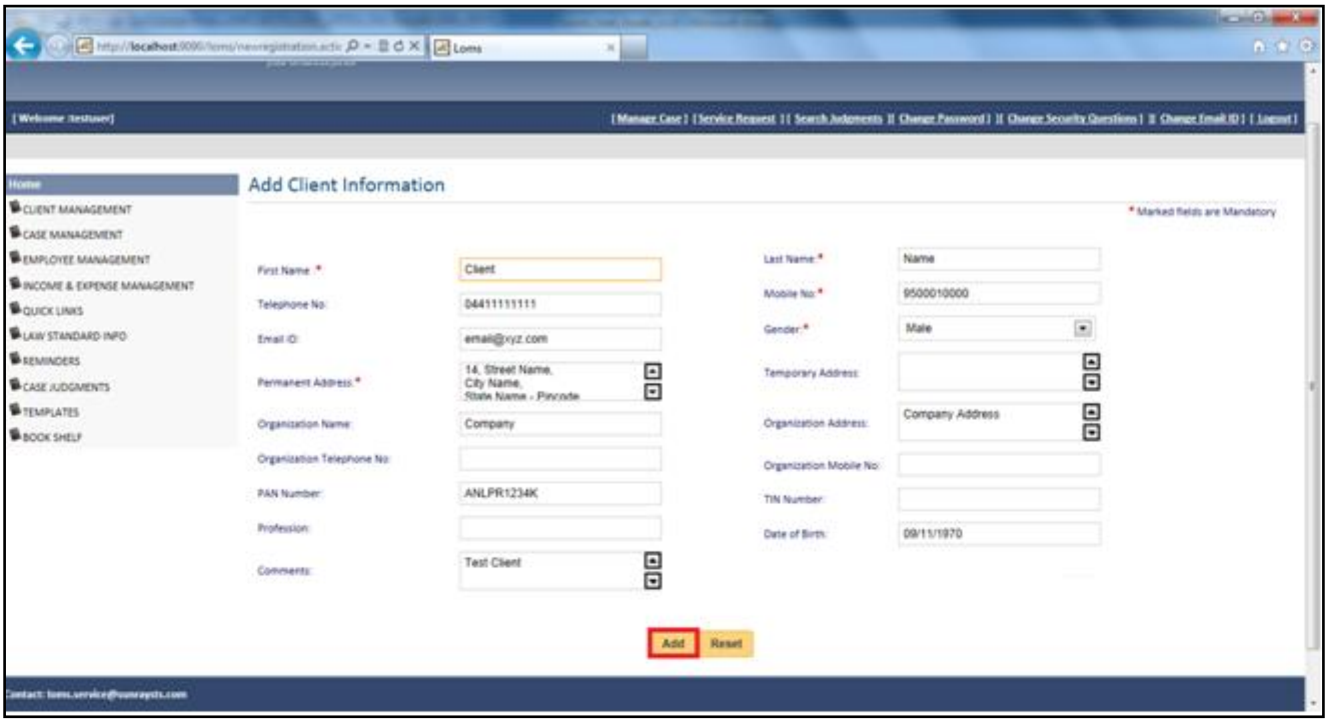
1.1 Add a client

Step 1: Navigate to **CLIENT MANAGEMENT > ADD CLIENT** link



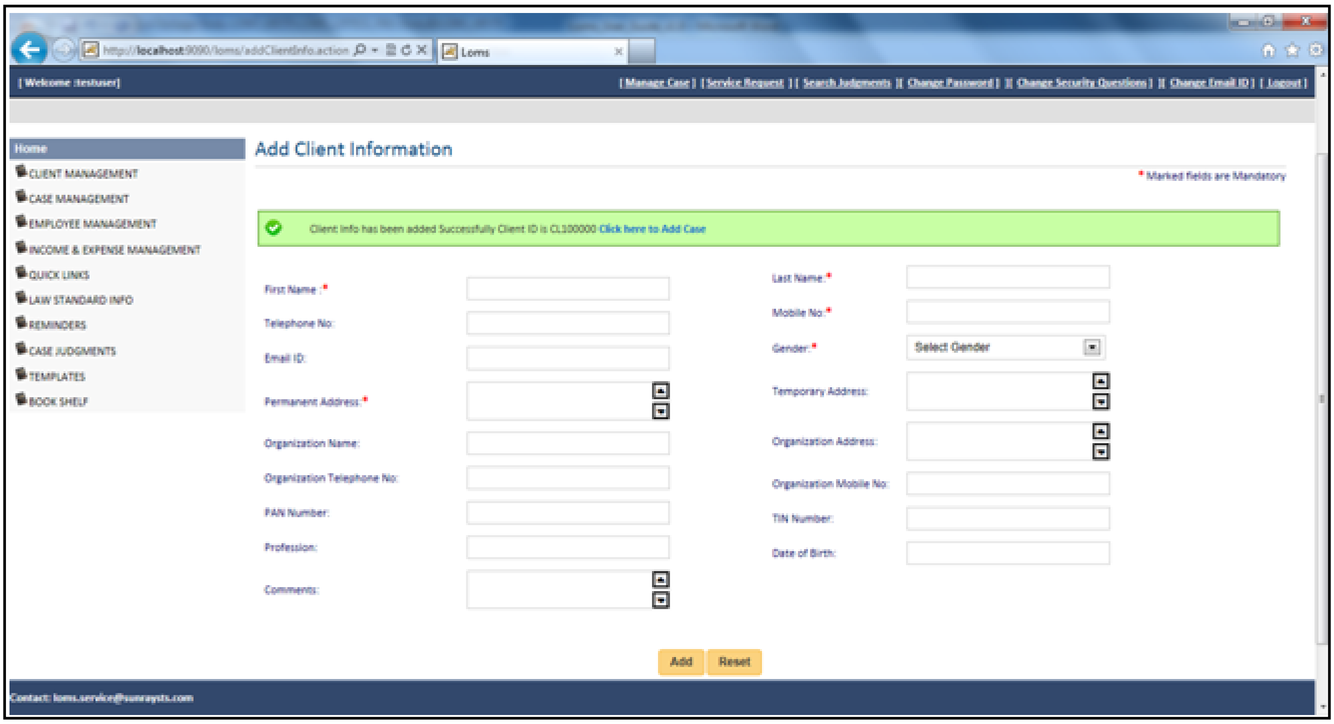
Step 2: Enter the details of the Client in the page as shown below

NOTE: Client's **FIRST NAME, LAST NAME, MOBILE NO, GENDER** and **PERMANENT ADDRESS** are mandatory fields. The application will not allow the user to add a client without entering a value for these fields



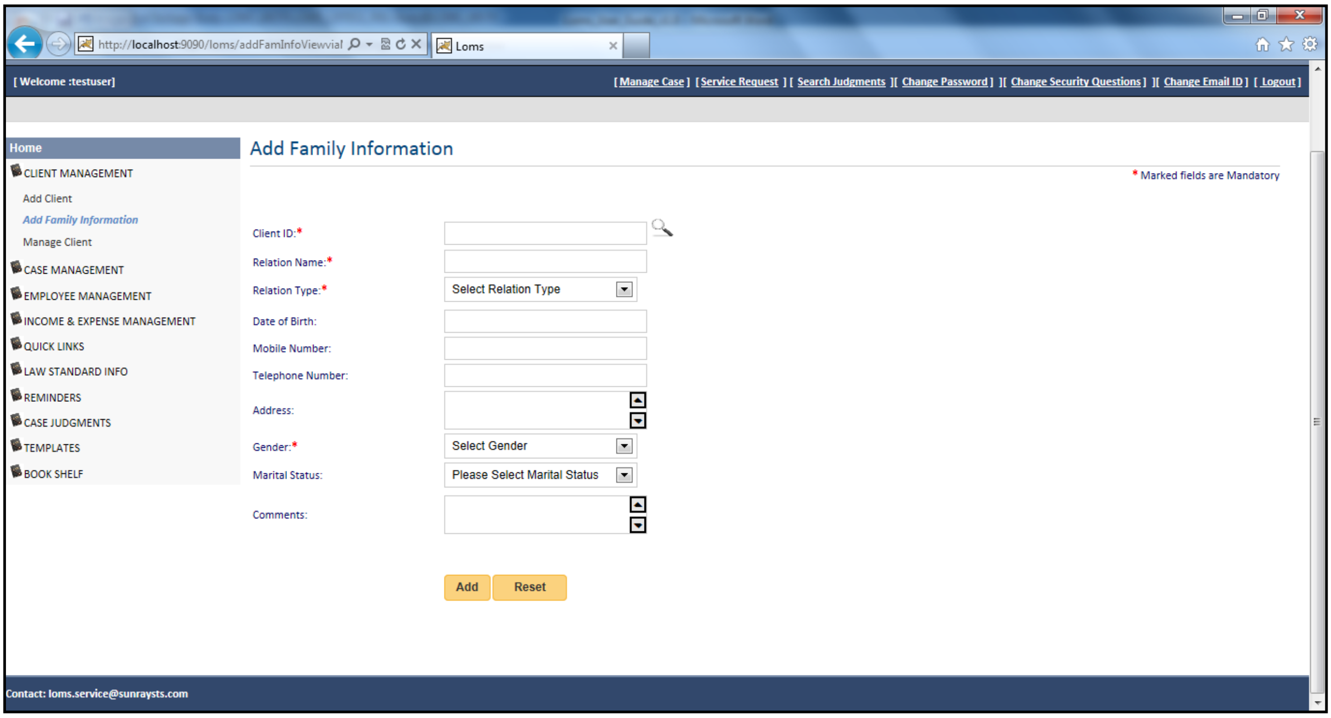
Step 3: Validate the entered data and click on the **ADD** button as shown in the image above. Once the client details are added to the database, the application will give a message "***Client Info has been added successfully Client ID is CL1XXXXX Click Here to Add Case***"

NOTE: Please note down the **CLIENT ID** for your future reference. The user can click on the "**Click Here to Add Case**" link to "**Add a Case**"



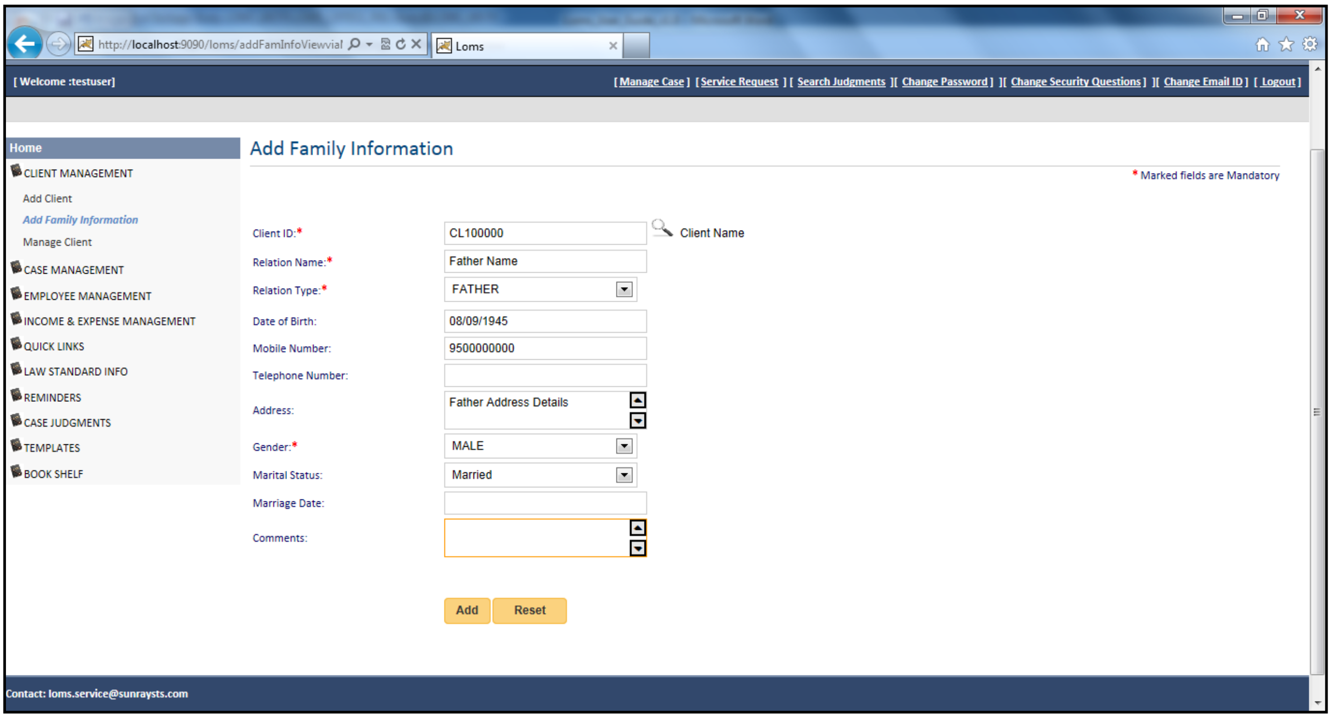
1.2 Add Client Family Information

Step 1: Navigate to **CLIENT MANAGEMENT > ADD FAMILY INFORMATION** link

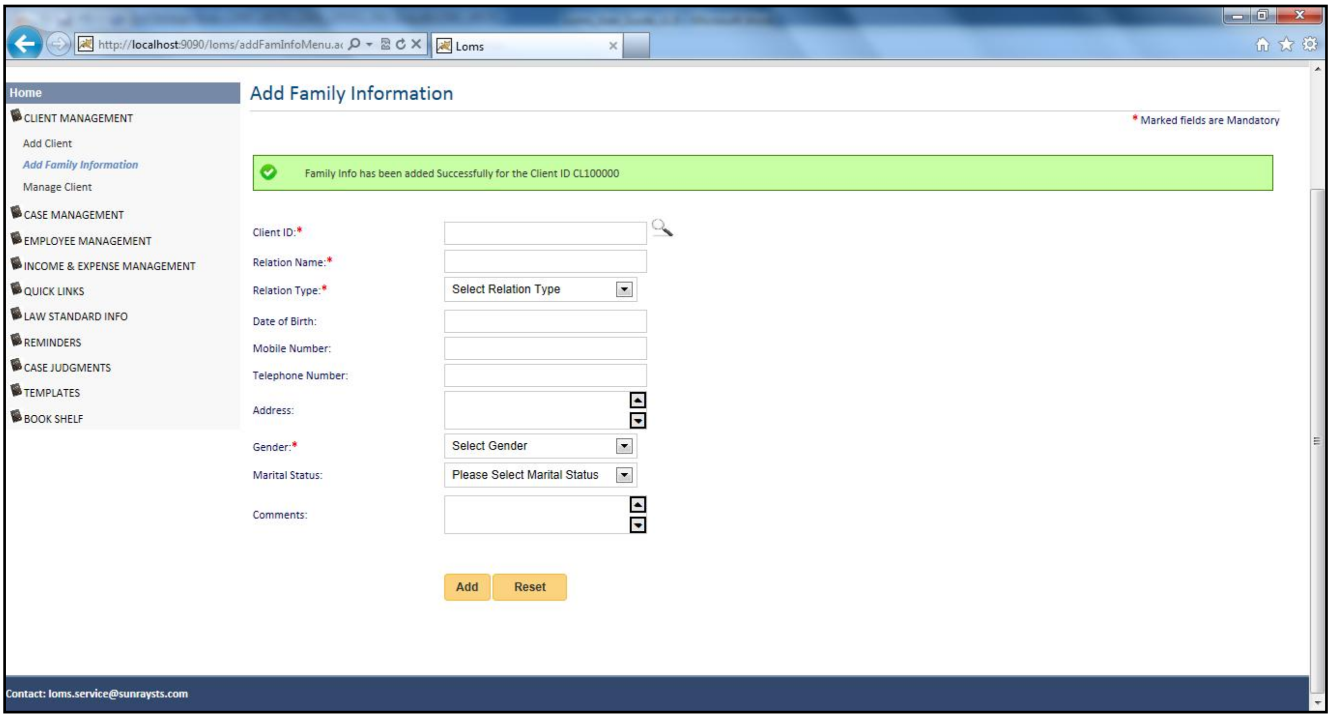


Step 2: Enter the details of the Client's relation in the page as shown below,

NOTE: Client ID, Relation Name, Relation Type and **Gender** are mandatory fields. The application will not allow the user to add a client without the value for these fields

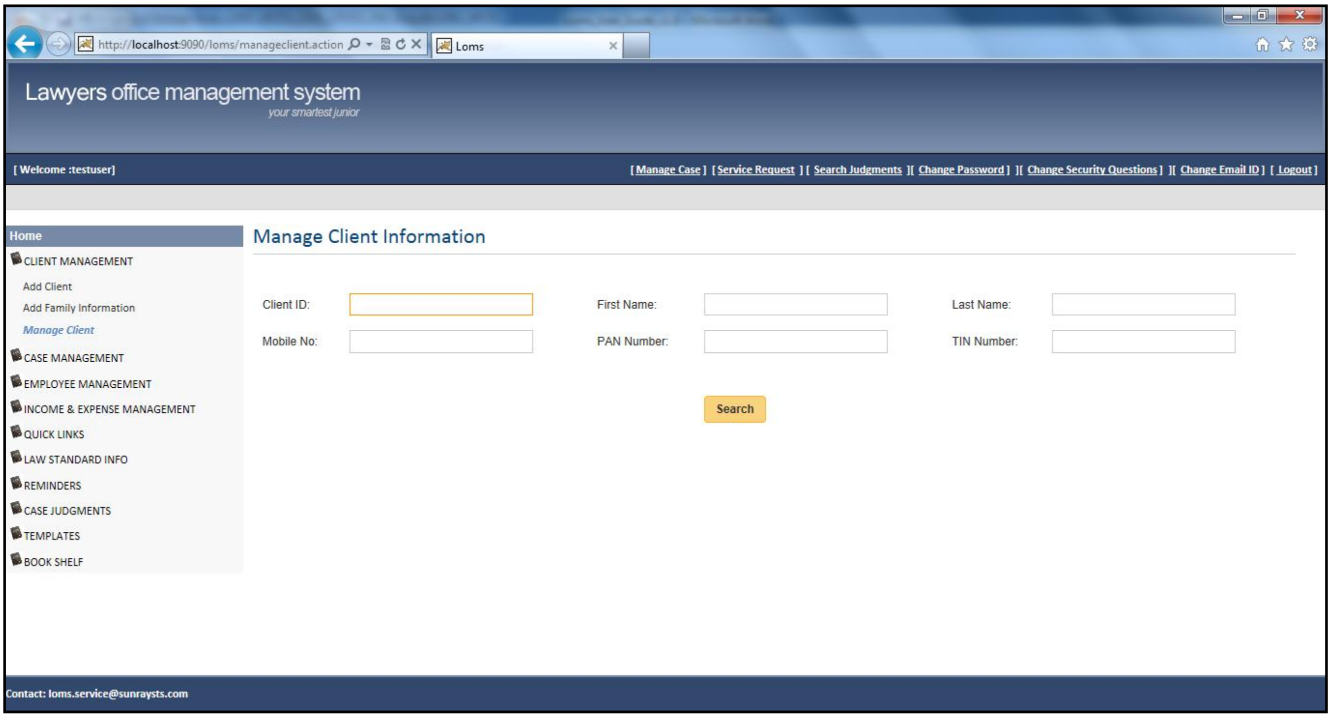


Step 3: Validate the entered data and Click on the **ADD** button as shown in the image above. Once the client's family details are added to the database, the application will give a message "***Family Info has been added successfully for the Client ID CL1XXXXX***"



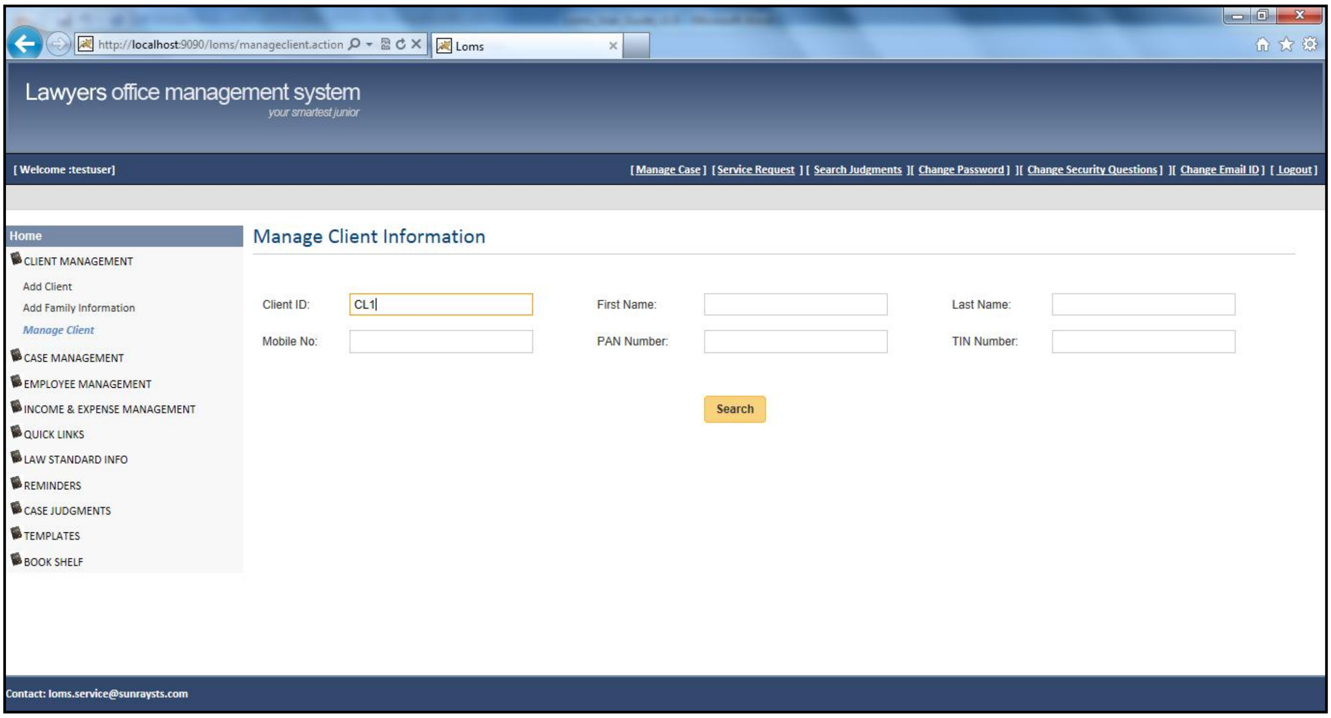
1.3 Search Client Information

Step 1: Navigate to **CLIENT MANAGEMENT > MANAGE CLIENT** link

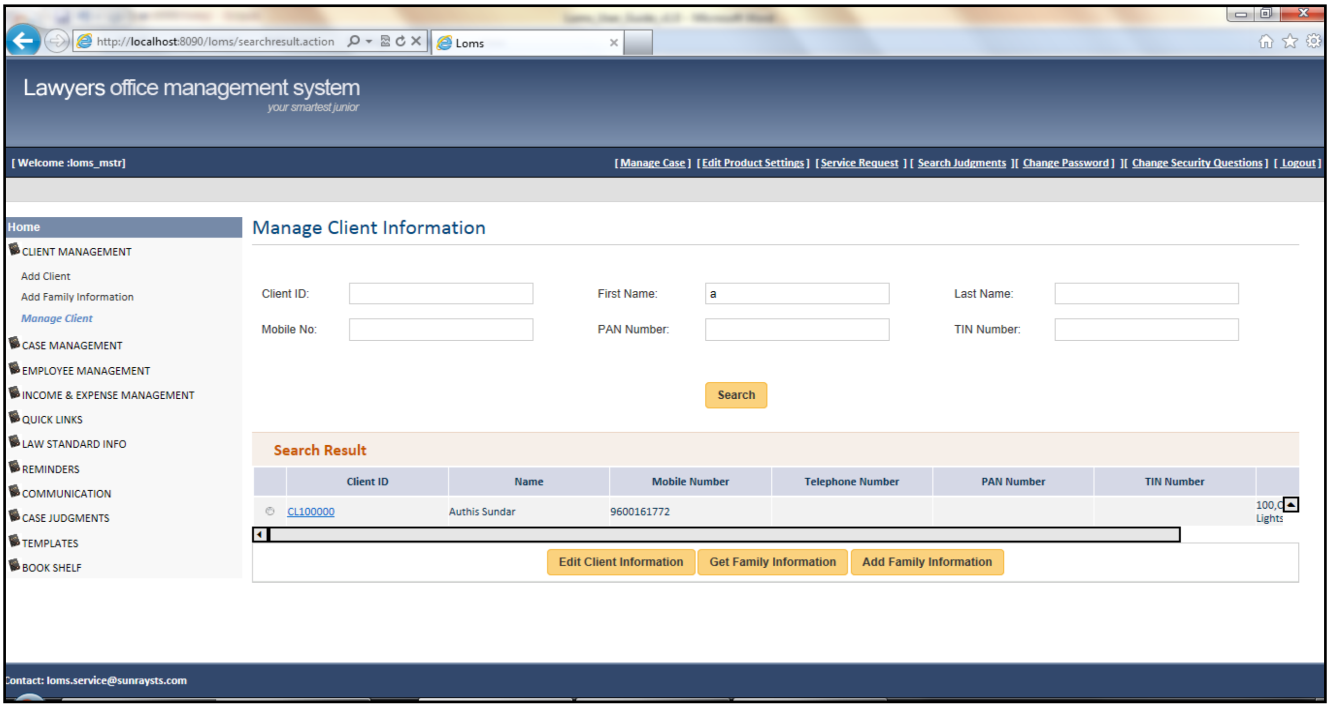


Step 2: Enter the value for any one field (Client ID / First Name / Last Name / Mobile No / PAN No / TIN No) as shown in the image below,

NOTE: The user can enter the information in parts to Search the Client Details. For e.g. If the Client's first name is "**David**" the application user can enter "**DAV**" (Small letters or Capital letters) and click on **SEARCH** button.



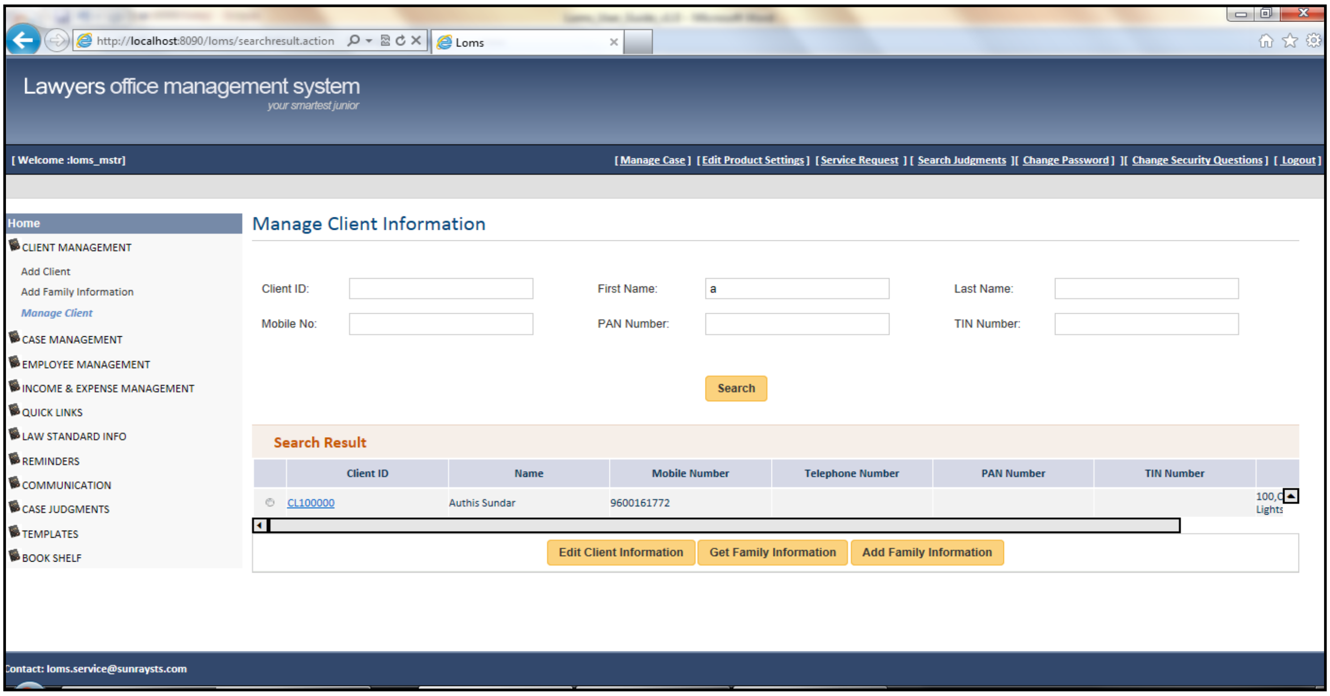
Step 3: Click on **SEARCH** button after entering the information. All client details with similar information will be listed as shown below,



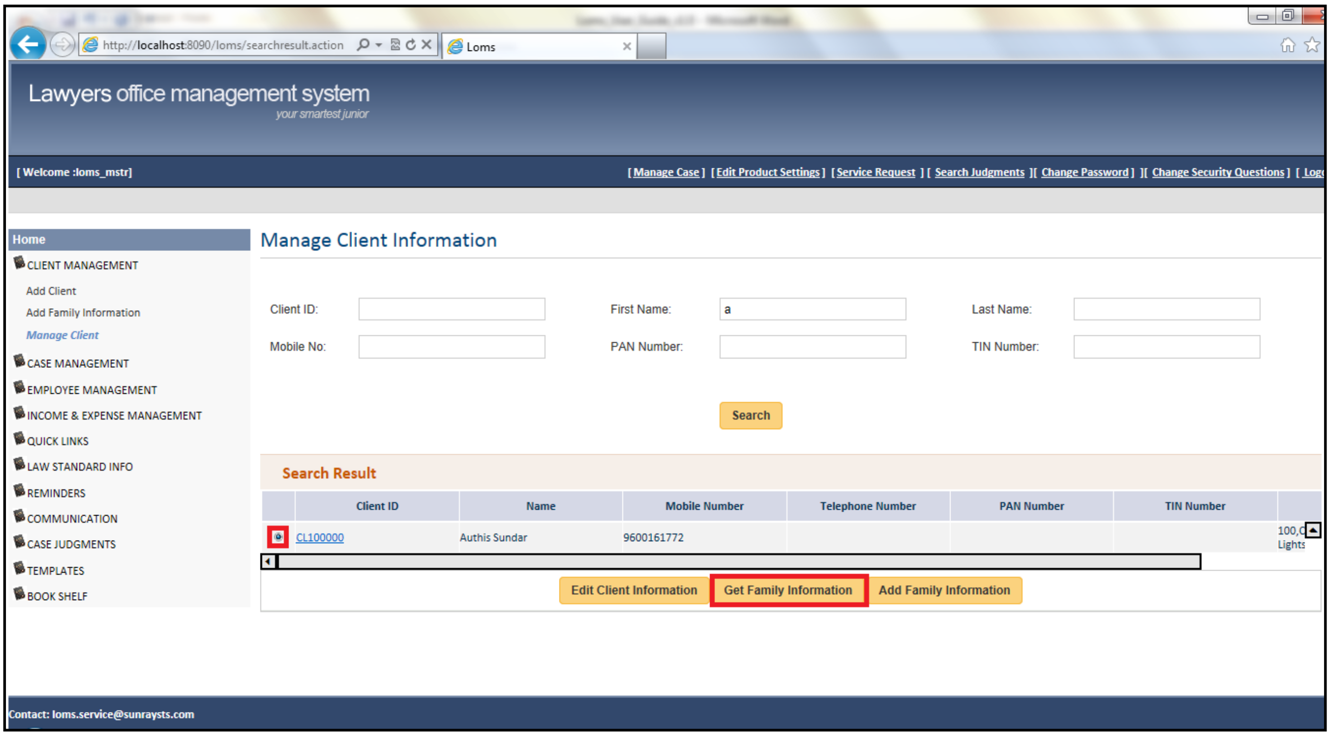
1.4 Search Client Family Information

Step 1: Navigate to **CLIENT MANAGEMENT > MANAGE CLIENT** link and enter the value for any one field (Client ID / First Name / Last Name / Mobile No / PAN No / TIN No) as shown in the image below,

NOTE: The user can enter the information in parts to Search the Client Details. For e.g. If the Client's first name is "**David**" the application user can enter "**DAV**" (Small letters or Capital letters) and click on SEARCH button and click **Search** button

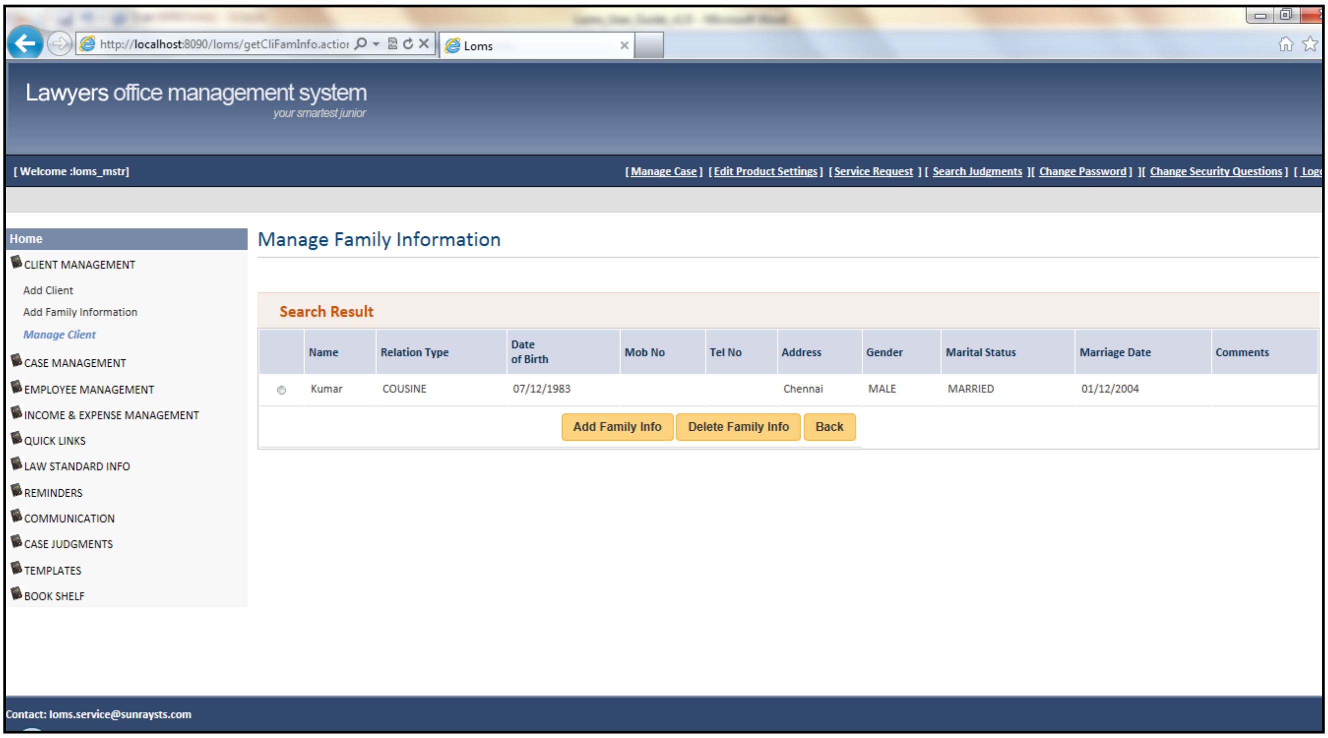


Step 2: Select radio button of the client id for which family info need to be retrieved and click **GET FAMILY INFORMATION** as shown below,



Step 3: The application will load all the available family information of the selected client.

NOTE: The user can click on "**ADD FAMILY INFO**" button to add a new relation for the same client. Same way you can delete the family information of the Client by clicking on "Delete Family Info" button

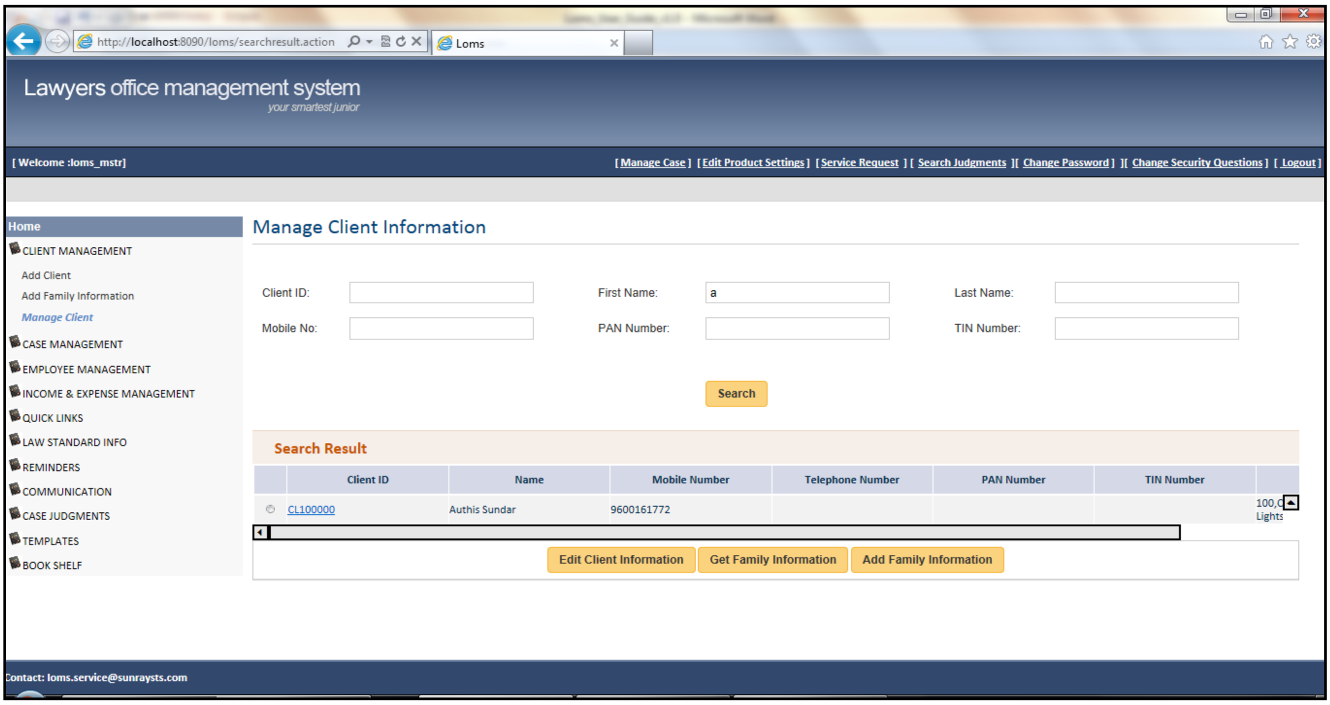


1.5 Edit Client Information

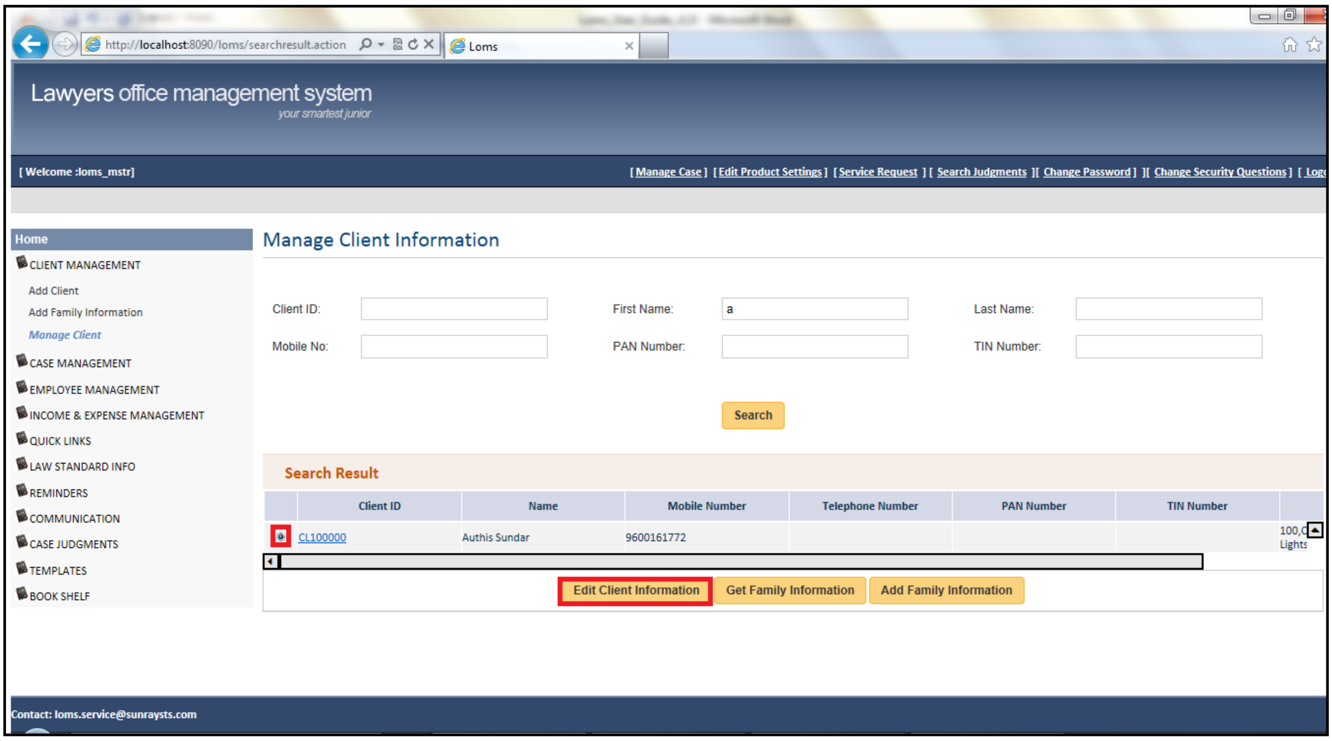
Step 1: Navigate to **CLIENT MANAGEMENT > MANAGE CLIENT** link

Step 2: Enter the value for any one of the field (Client ID / First Name / Last Name / Mobile No / PAN No / TIN No) as shown in the image below and click on the **SEARCH** button.

NOTE: The user can enter the information in parts to Search the Client Details. For e.g. If the Client's first name is "**David**" the application user can enter "**DAV**" (Small letters or Capital letters) and click on SEARCH button and click **Search** button

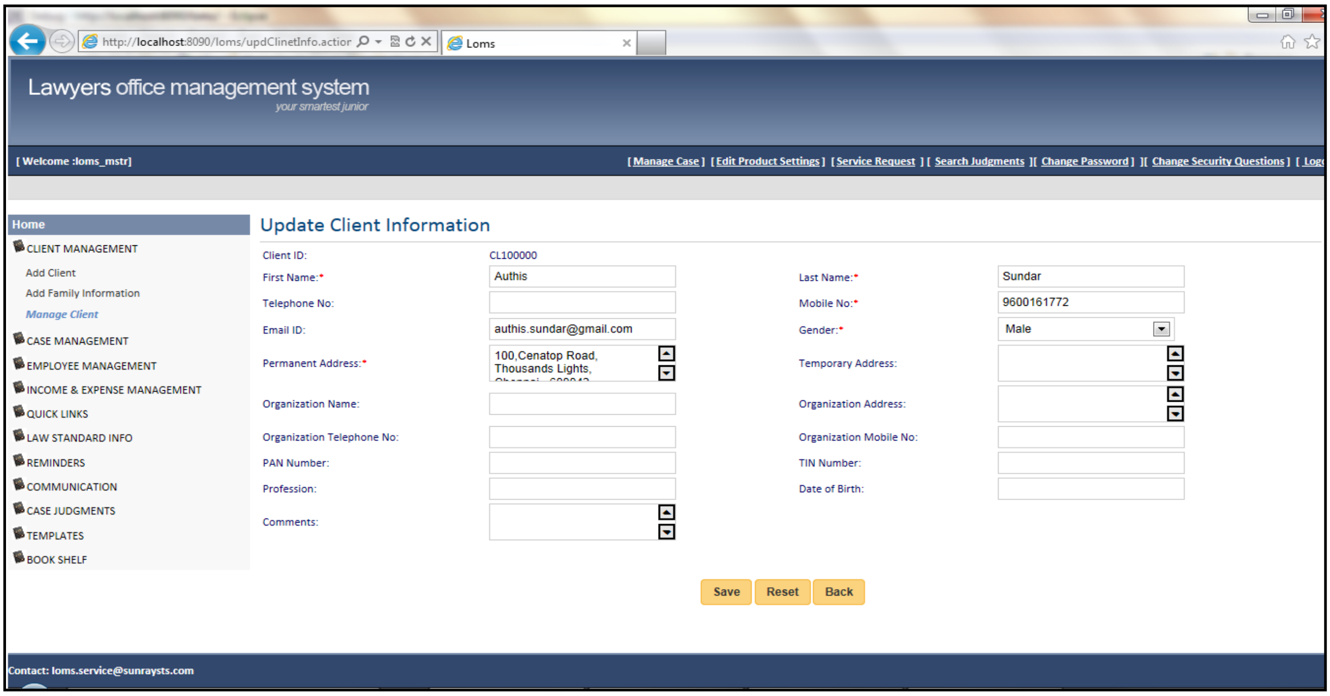


Step 3: The application will list the entire Clients having first name "A". Select the client you wish to edit and click on "**EDIT CLIENT INFORMATION**" button

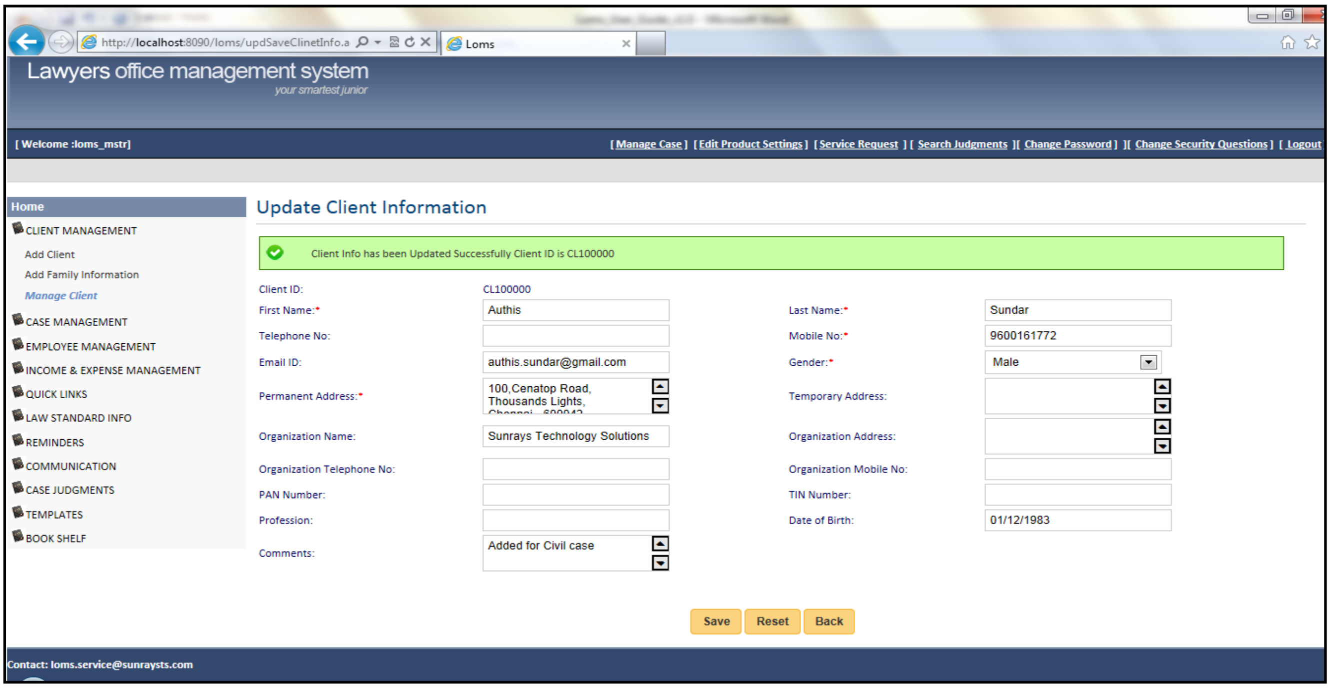


Step 4: When the user clicks on the "**EDIT CLIENT INFORMATION**" button the application will load with all the Client details as shown below

NOTE: Client's **FIRST NAME, LAST NAME, MOBILE NO, GENDER** and **PERMANENT ADDRESS** are mandatory fields. The application will not allow the user to savethe client information without the value for these fields.



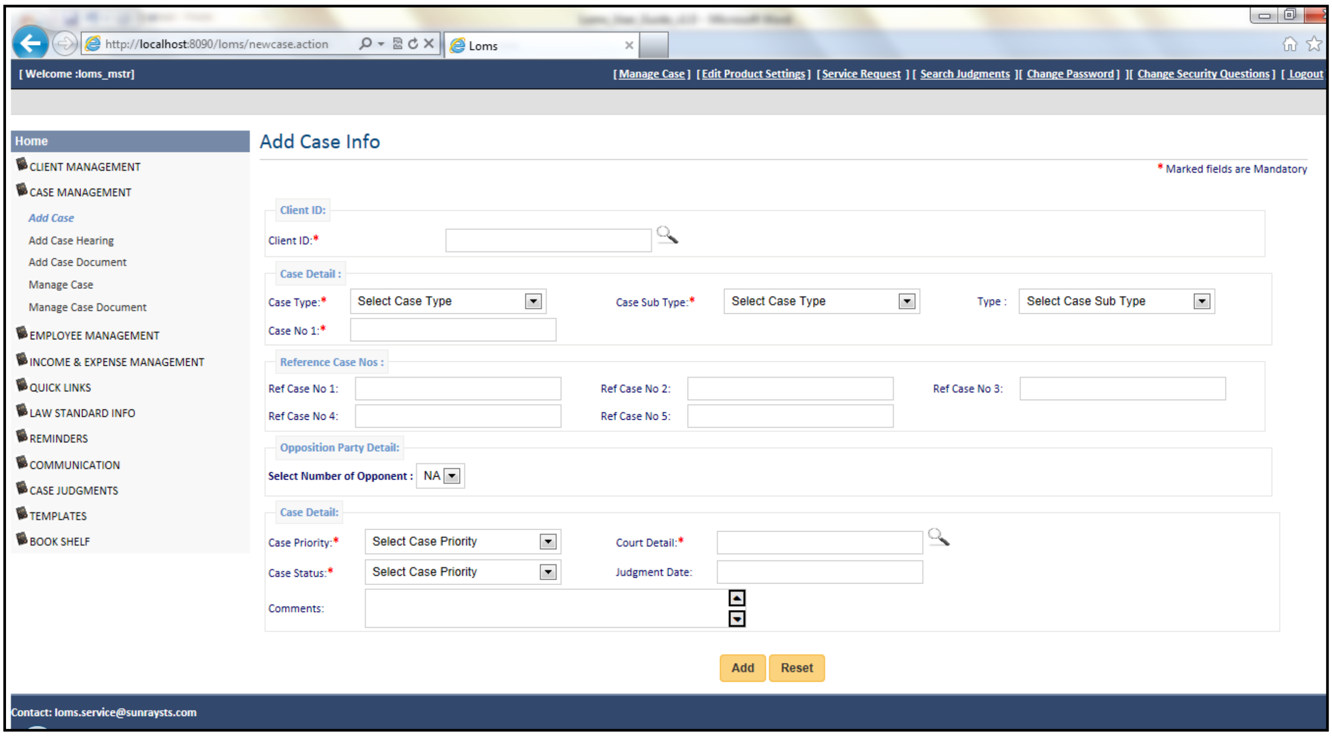
Step 5: After editing the details, Click on the **SAVE** button as shown in the image above. Once the client details are added to the database, the application will give a message ***"Client Info has been Updated Successfully Client ID is CL1XXXXX Click Here to Add Case".***



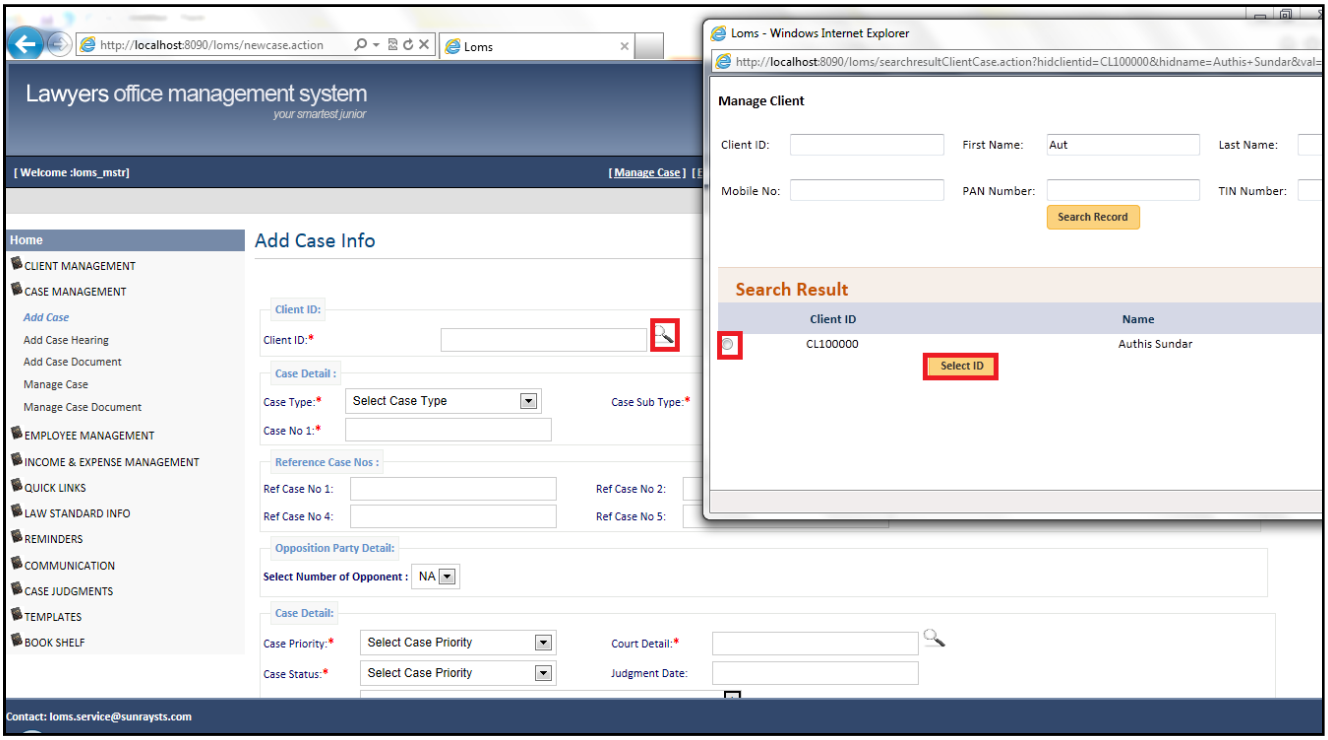
2. CASE MANAGEMENT

2.1 Add Case Information

Step 1: Navigate to **CASE MANAGEMENT > ADD CASE LINK**



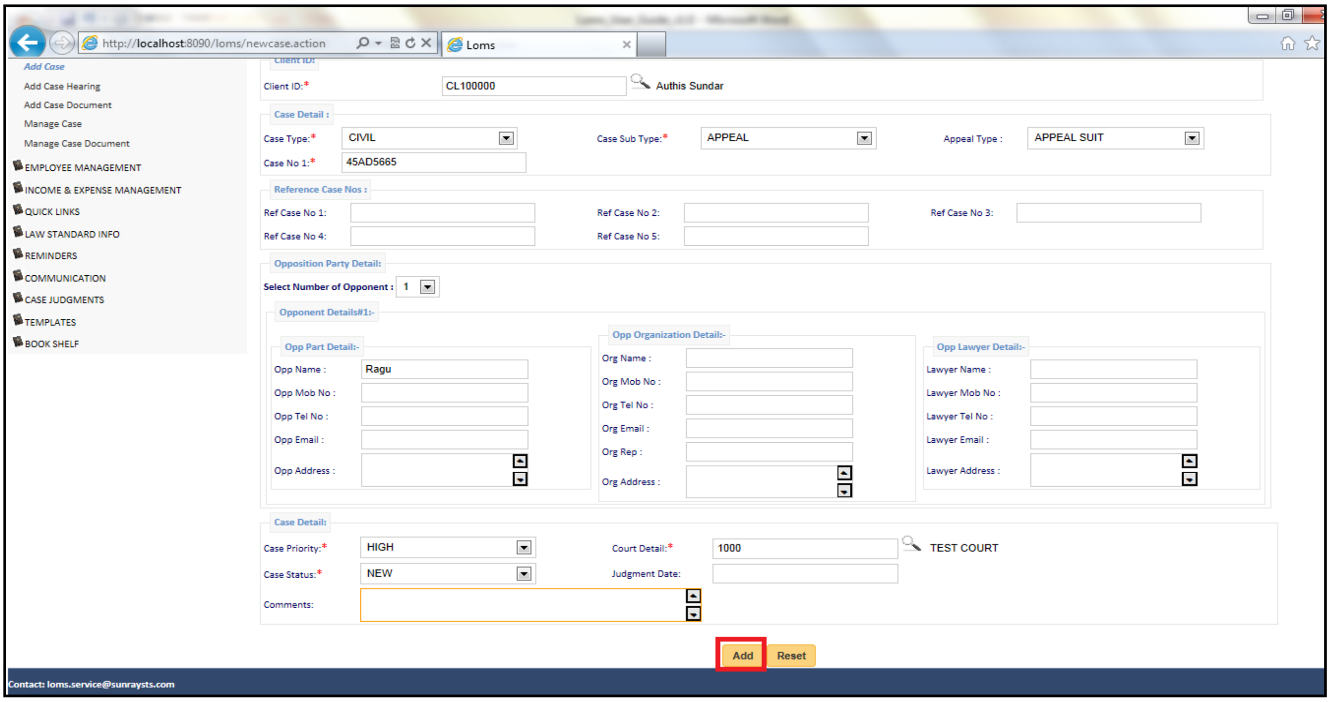
Step 2: Locate the client id and enter the other case related information as shown below,



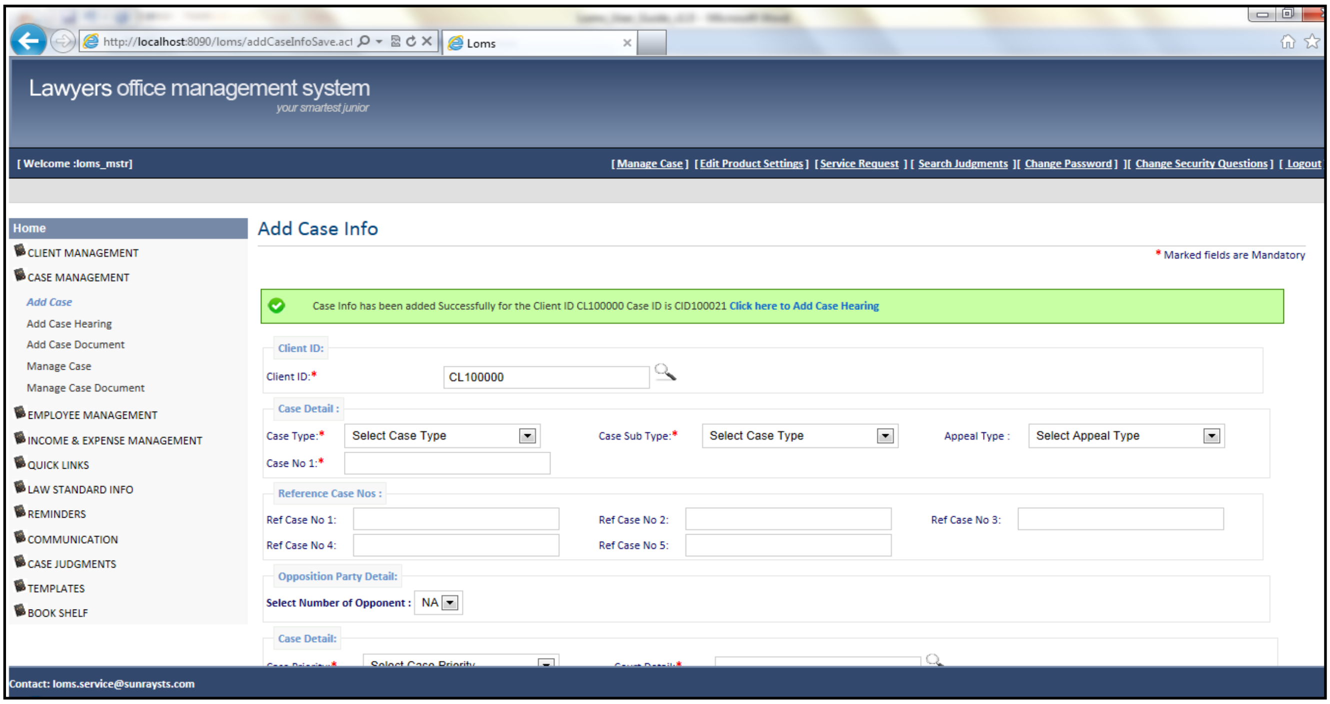
NOTE:

a) Client's **Client ID, Case Sub Type, Type, Case No, Case Priority, Case Status and Court Detail** are mandatory fields. The application will not allow the user to add a case without the value for these fields.

b) If the user doesn't know exact Client Id, he can search and select the client id by Clicking Search Icon that is available next to the text box. On clicking the icon the application will pop up the "Client Search". For details regarding how to Search a client refer to Section 1.3 in this document (***Search Client Information***)



Step 3: Validate the entered details and Click on the Add button as shown in the image above. Once the Case details are added to the database, the application will give a message ***"Case Info has been added successfully for the Client ID CLXXXXXX Case ID is CIDXXXXXX Click here to Add Case Hearing".***



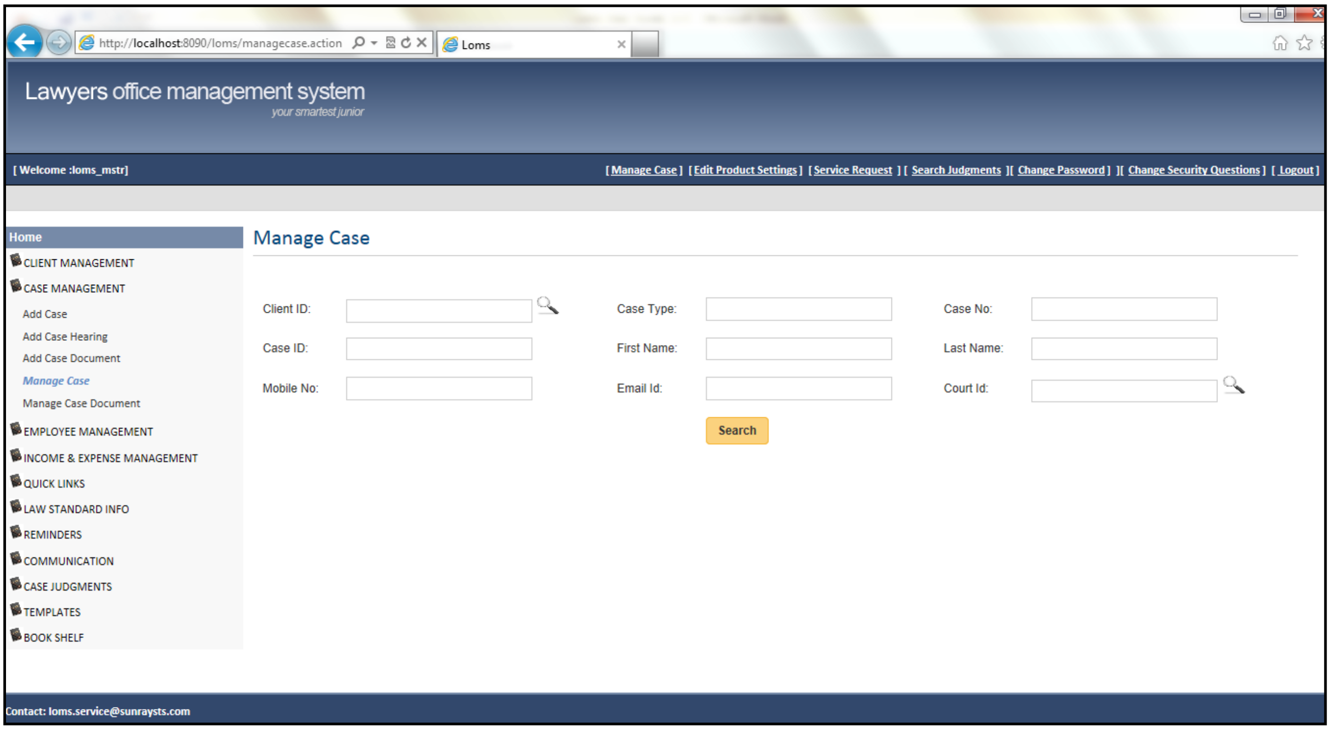
NOTE:

a) The User can add "**Case Hearing**" information for the added case directly by clicking on the link ***Click here to Add Case Hearing***

b) An email will be sent to the Client automatically after the case information is added to the database

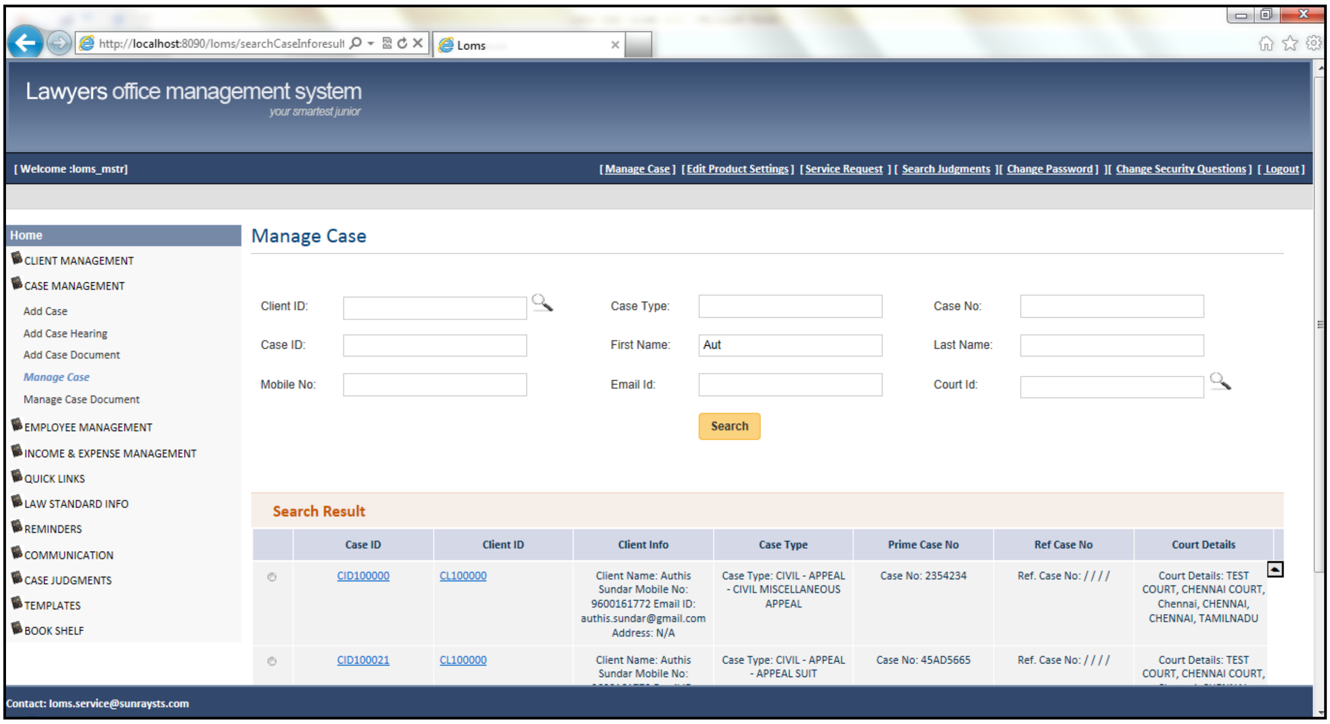
2.2 Search Case Information

Step 1: Navigate to **CASE MANAGEMENT > MANAGE CASE**



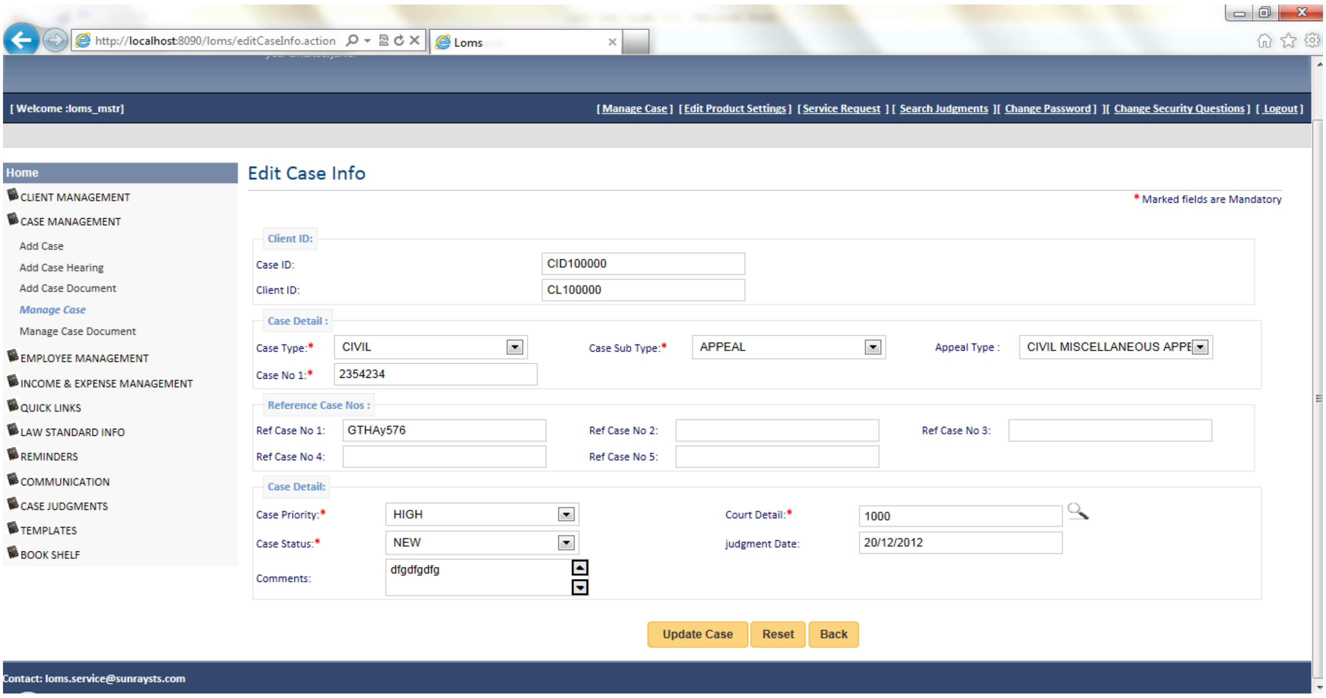
Step 2: Enter the value for any one of the field (Client ID/Case Type/Case No/Case ID/First Name/Last Name/Mobile No/Email Id/Court Id) as shown in the image below and click on the SEARCH button. The application will list all the case results based on the search criteria.

NOTE: The user can enter the information in parts to Search the Case Details. For e.g. If the Client's first name is "**David**" the application user can enter "**DAV**" (Small letters or Capital letters) and click on SEARCH button.



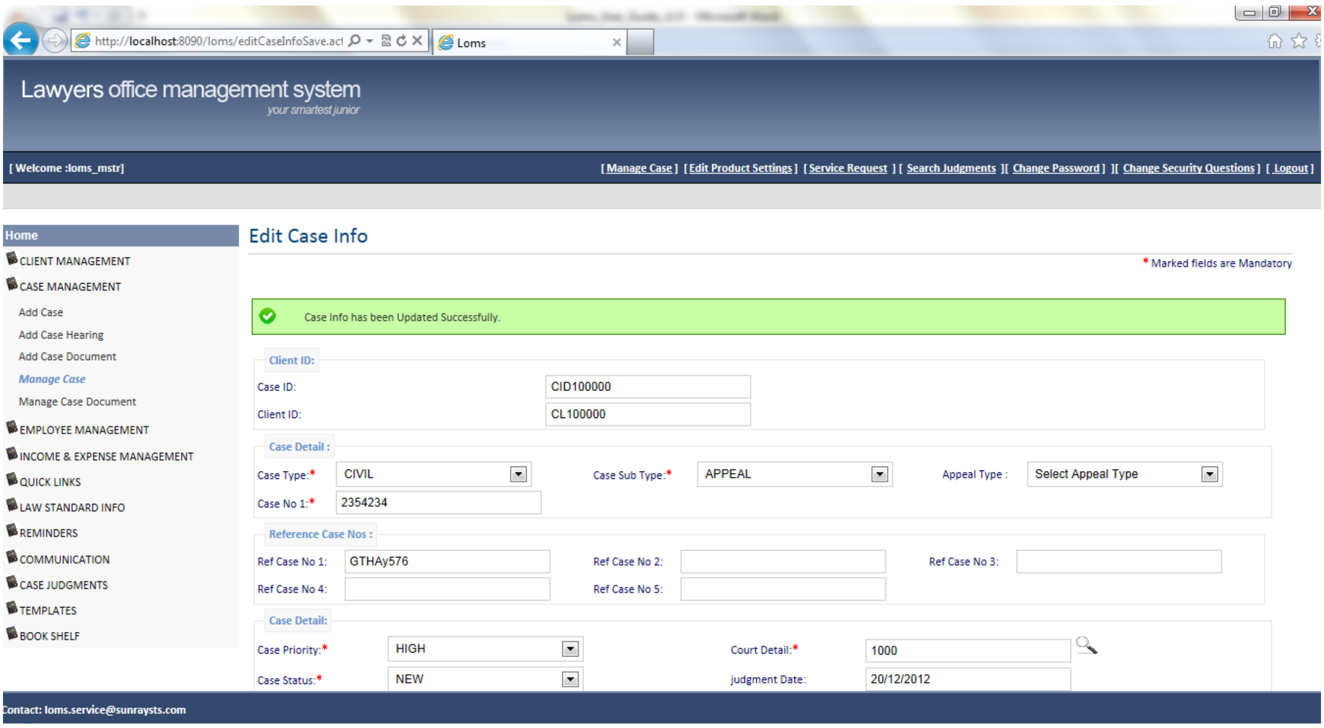
2.3 Modify Case Information

Step 1: After the user searches for the case information as explained in the "**SEARCH CASE INFORMATION**" section above. Select the Case ID which you want to modify and click on "**EDIT CASE INFO**" button.



Step 3: User can edit the Case details and Click Update Case button. Once the Case details are updated to the database, the application will give a message ***"Case Info has been updatedSuccessfully".***

Note: Client's **Client ID, Case Sub Type, Type, Case No, Case Priority, Case Status and Court Detail** are mandatory fields. The application will not allow the user to add a case without the value for these fields.

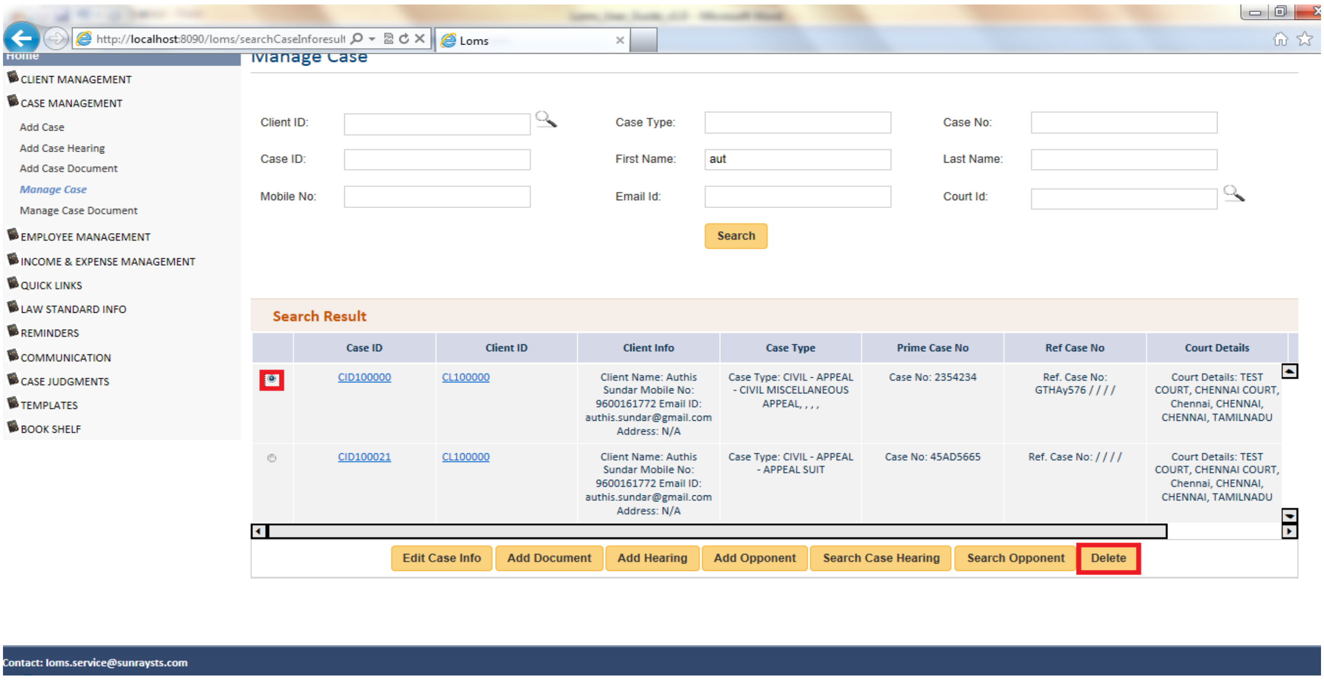


2.4 Delete Case & Opponent Information

Step 1: Search for CASE INFORMATION as explained in the "**SEARCH CASE INFORMATION**" section

Step 2: From the Search result select the case you want to delete and click on the DELETE Button

NOTE: Once a case has been deleted, all case related information such as Case Opponent details, Case hearing details and Case Documents will be deleted automatically.

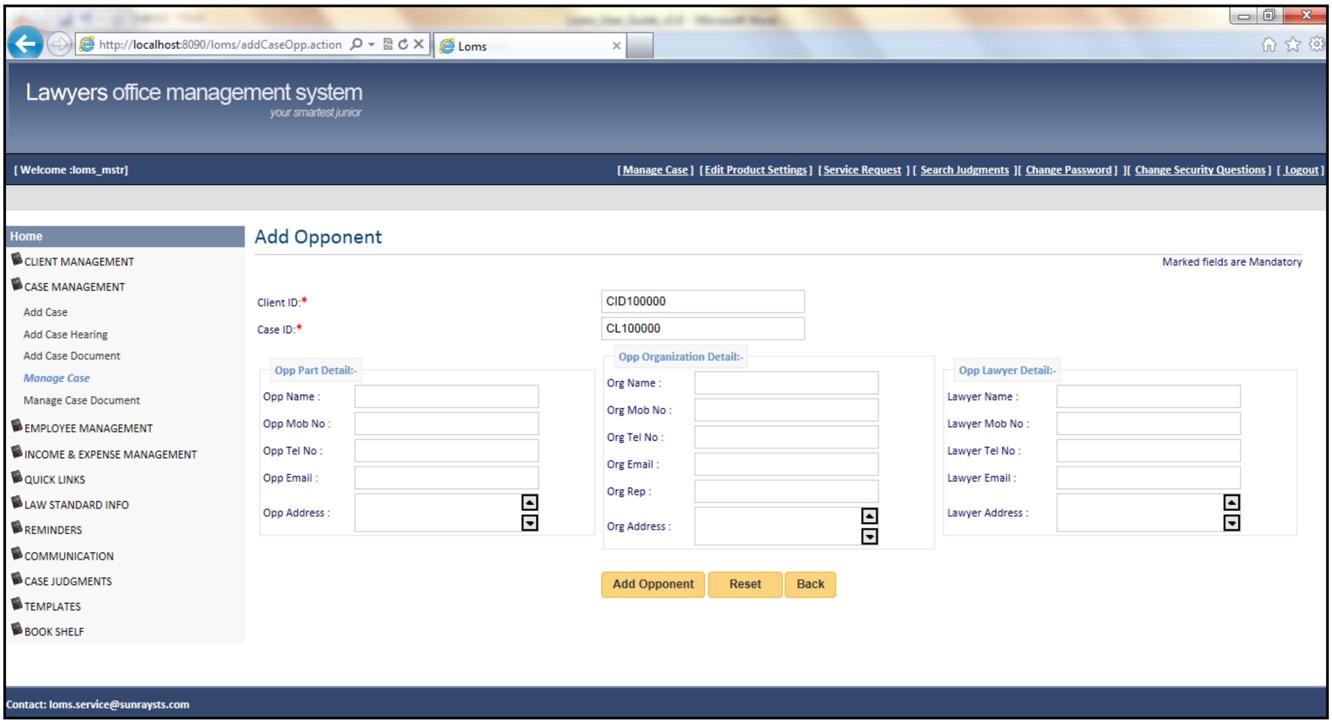


2.5 Add Opponent Information

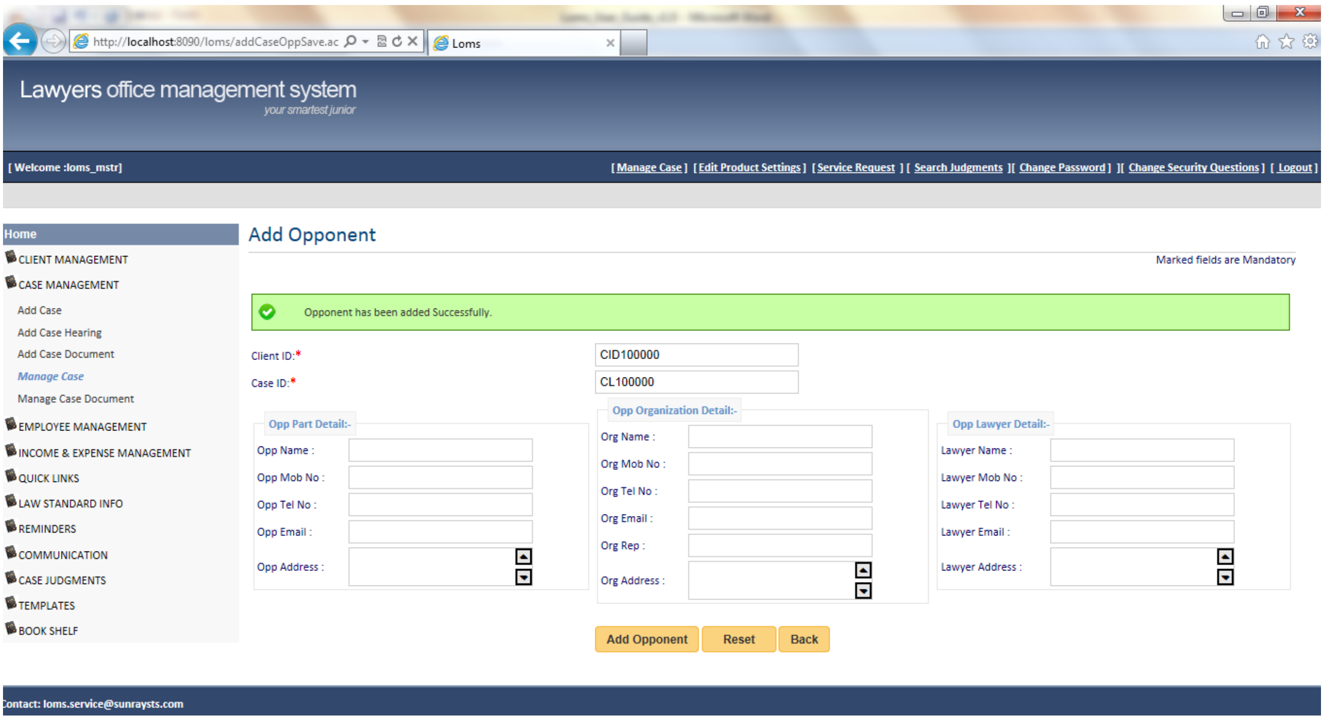
Step 1: Search for CASE INFORMATION as explained in the "**SEARCH CASE INFORMATION**" section

Step 2: Select the case for which you wish to add an opponent and click on **ADD OPPONENT** button, the "Add Opponent page" will open as shown below,

NOTE: Opponent detail can be added in Add Case page also (Refer 2.1 Add Case Information)



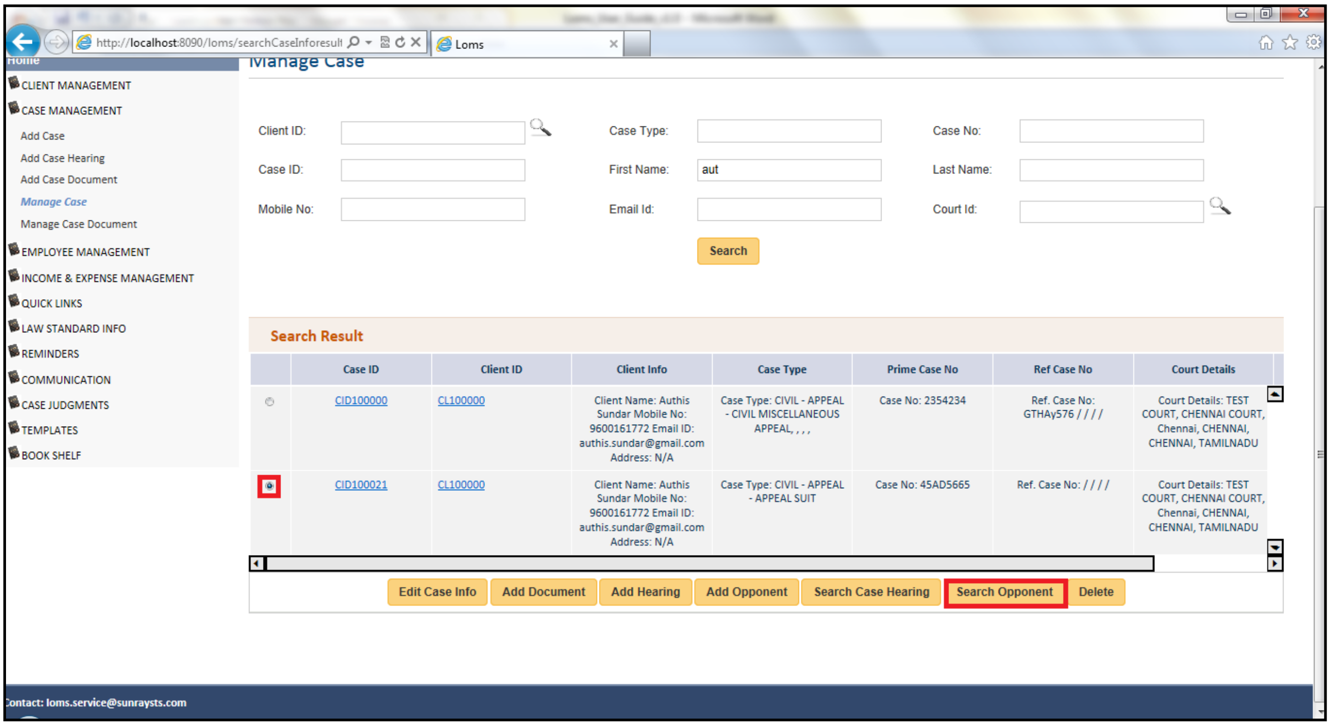
Step 3: Enter the Opponent details and click ADD OPPONENT button. Once the Opponent details are added to the database, the application will give a message ***"Opponent has been added successfully".***



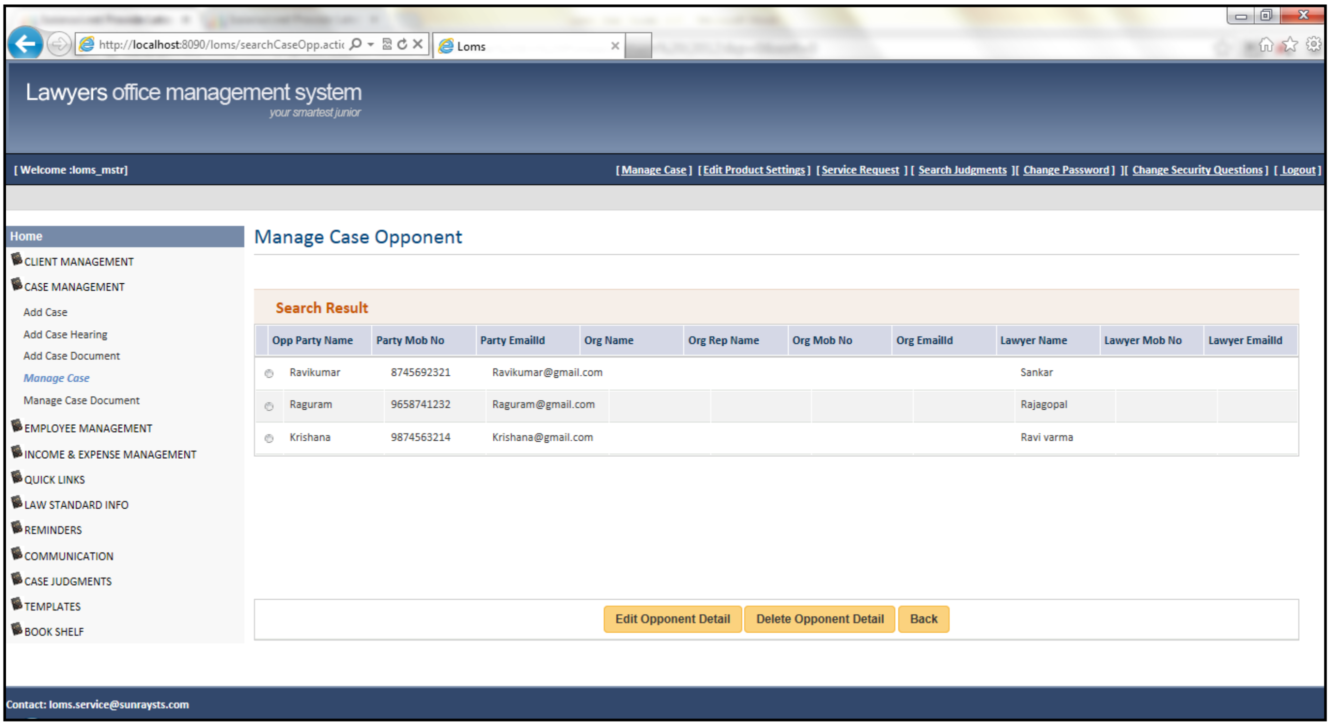
2.6 Search Opponent Information

Step 1: Search for CASE INFORMATION as explained in the “**SEARCH CASE INFORMATION**” section

Step 2: Select the case for which you want to view the opponent(s) and click on Search Opponent button.



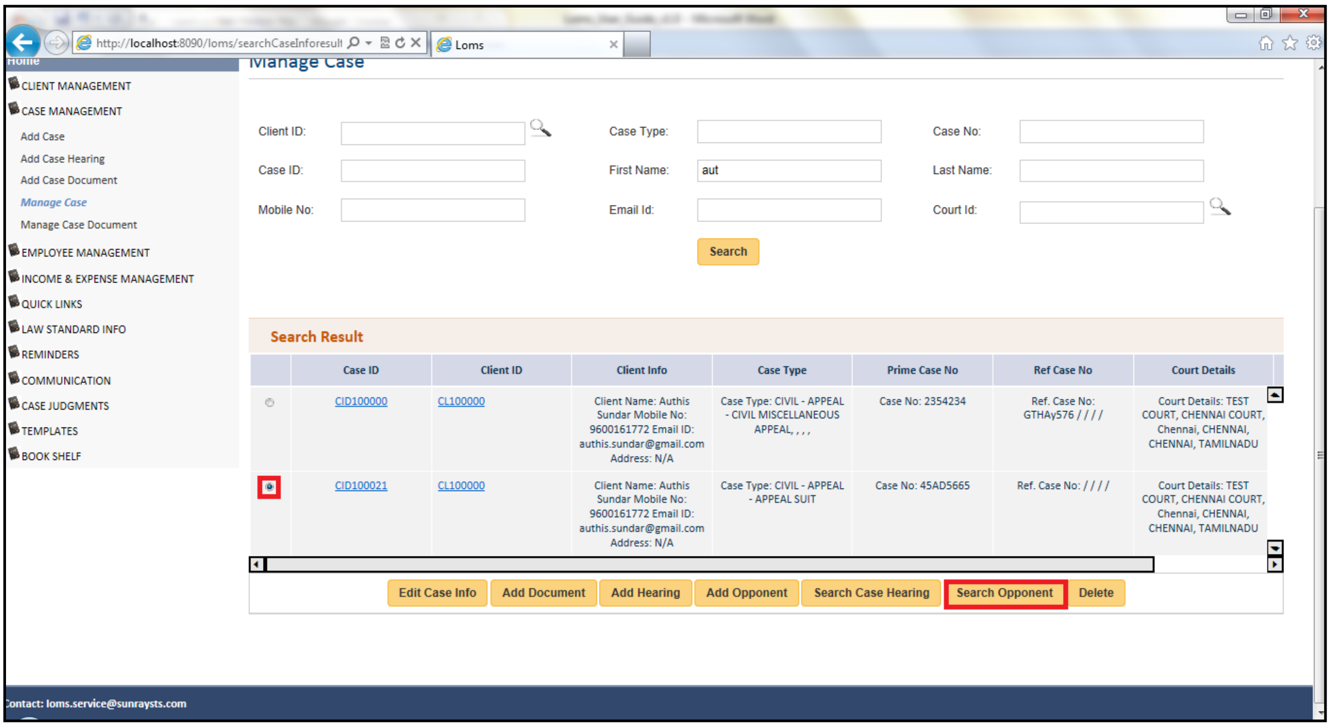
Step 3: Once the user clicks on SEARCH button, the application will load with all the opponent information for that particular case.



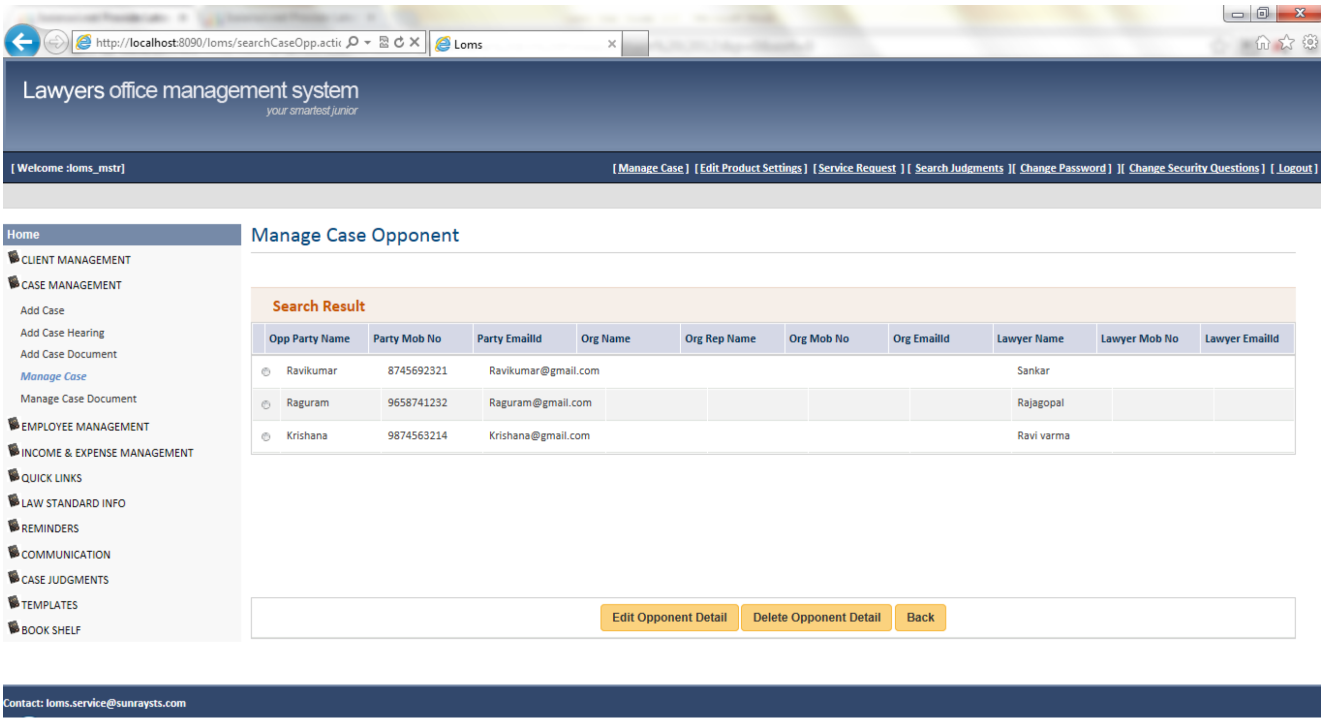
2.7 Modify Opponent Information

Step 1: Search for CASE INFORMATION as explained in the “**SEARCH CASE INFORMATION**” section

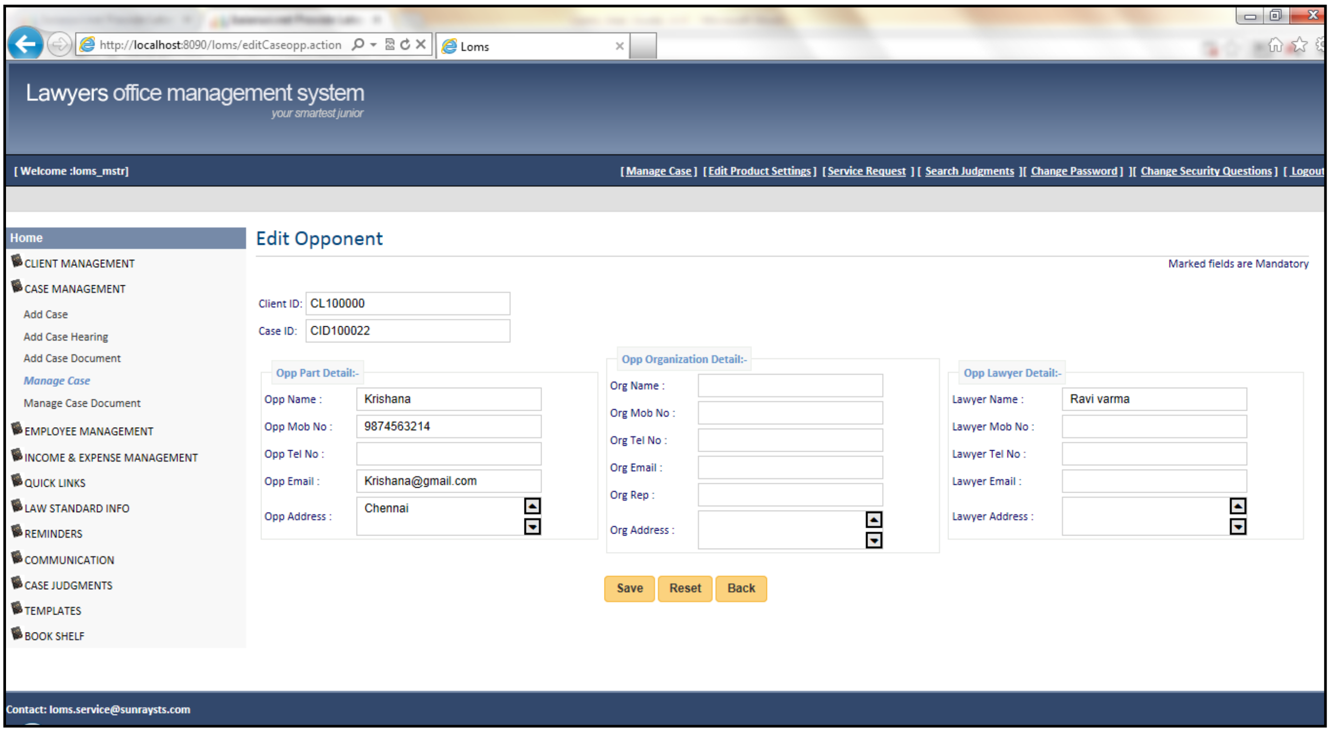
Step 2: Select the case for which you want to Search an opponent and click on SEARCH OPPONENT button.



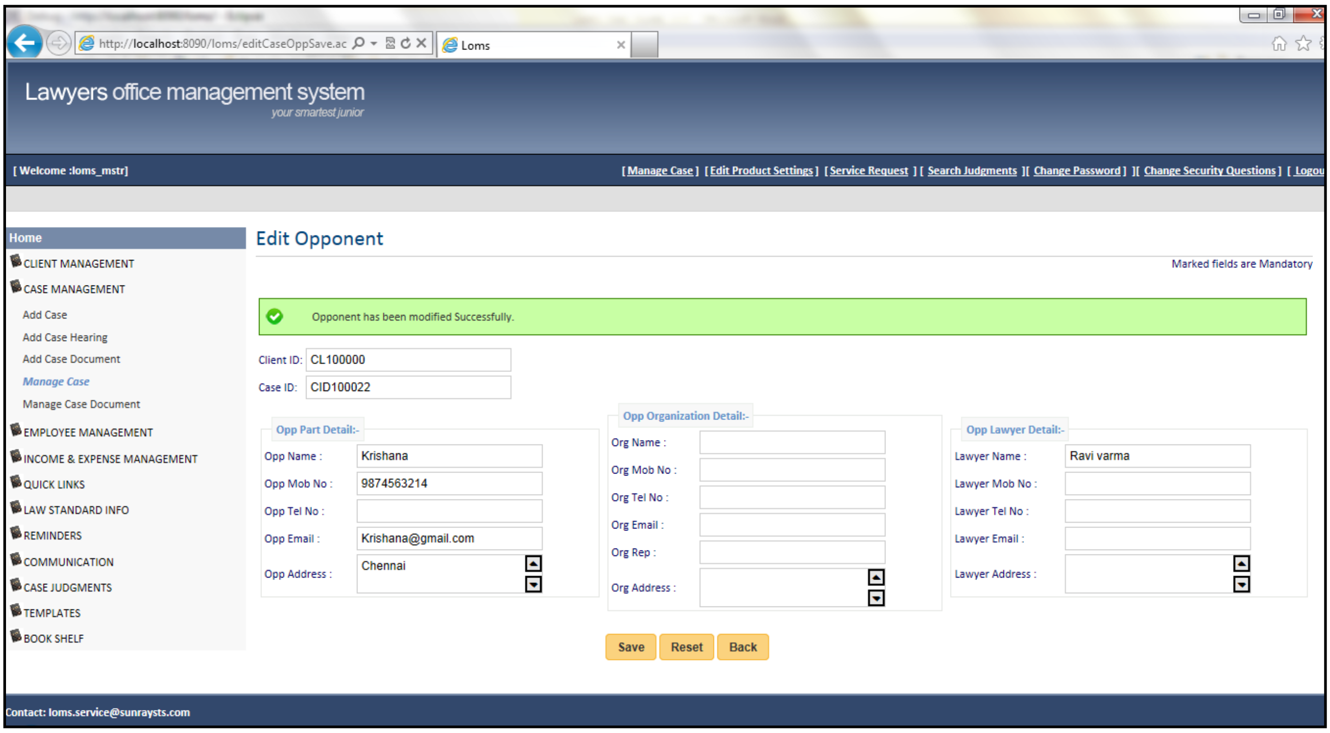
Step 3: Once the user clicks on SEARCH button, the application will load with all the opponent information for that particular case.



Step 4: Select the Opponent you wish to Modify and click on **EDIT OPPONENT DETAIL** button.



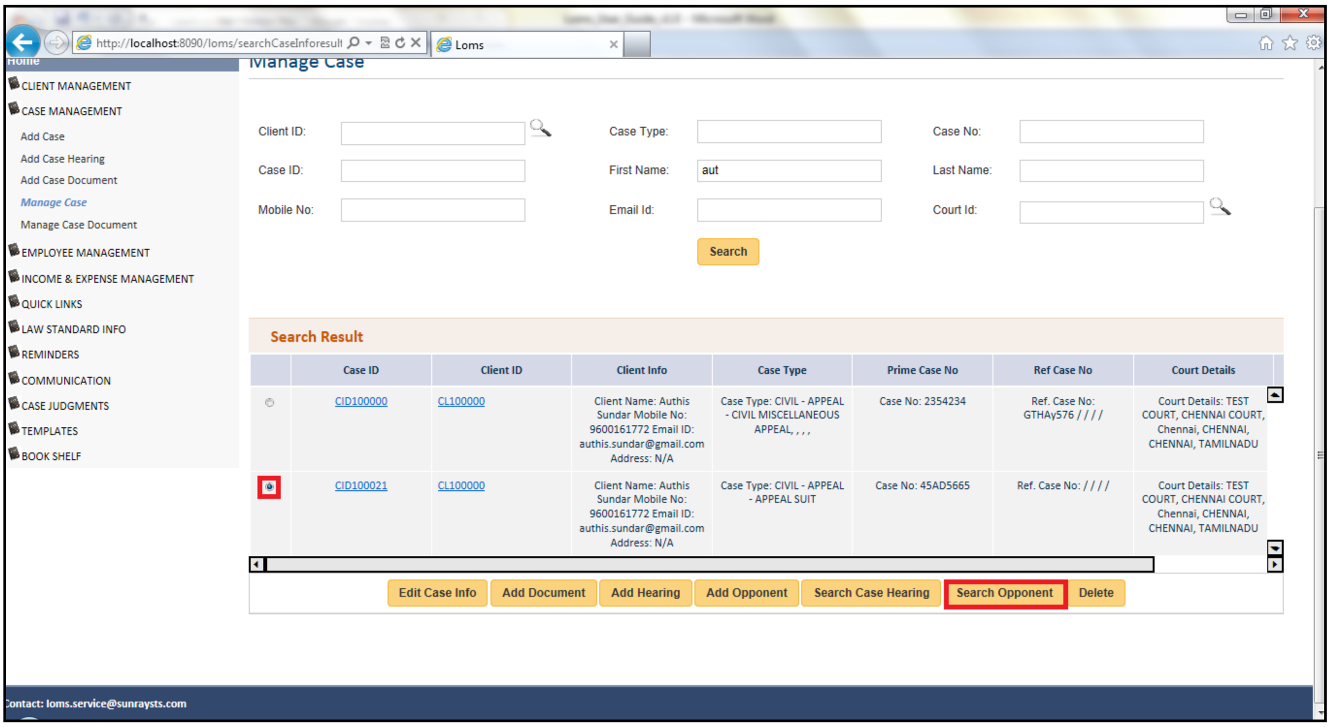
Step 5: Edit the Opponent detail and click on the SAVE button. Once the Opponent details are updated to the database, the application will give a message ***"Opponent has been modified successfully".***



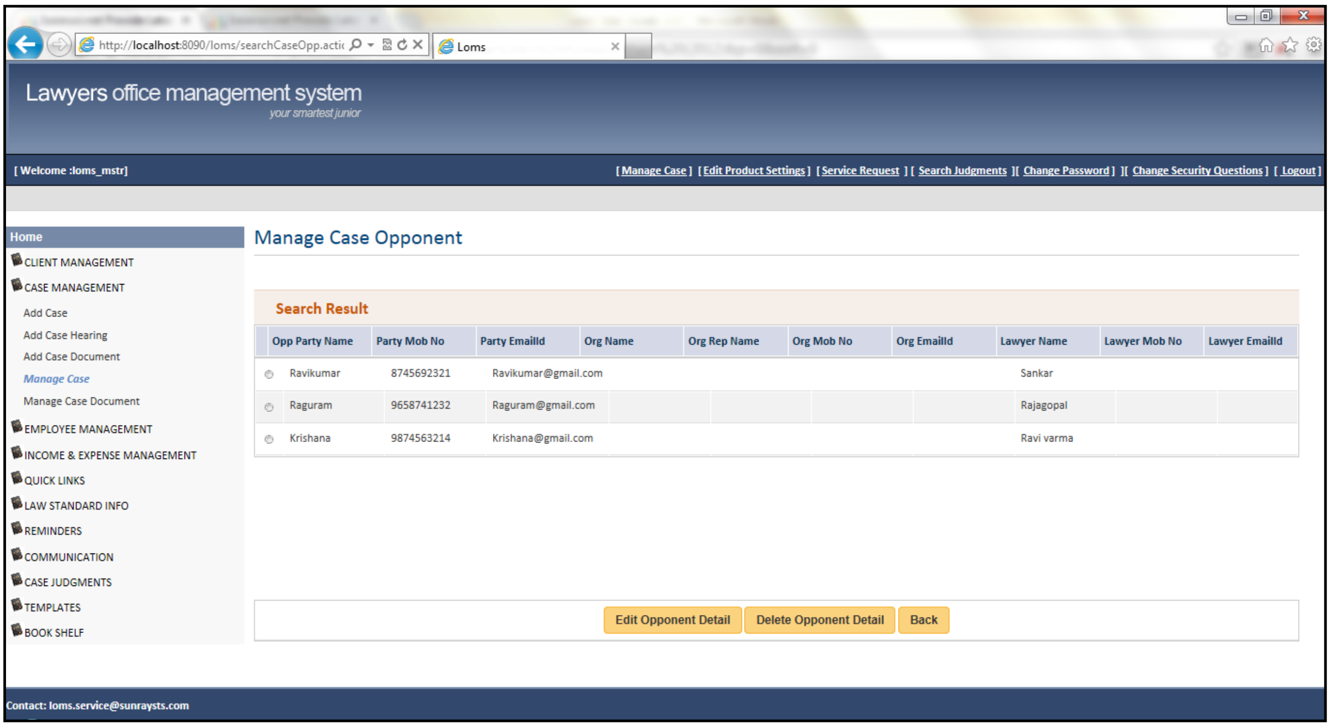
2.8 Delete Opponent Information

Step 1: Search for CASE INFORMATION as explained in the “**SEARCH CASE INFORMATION**” section

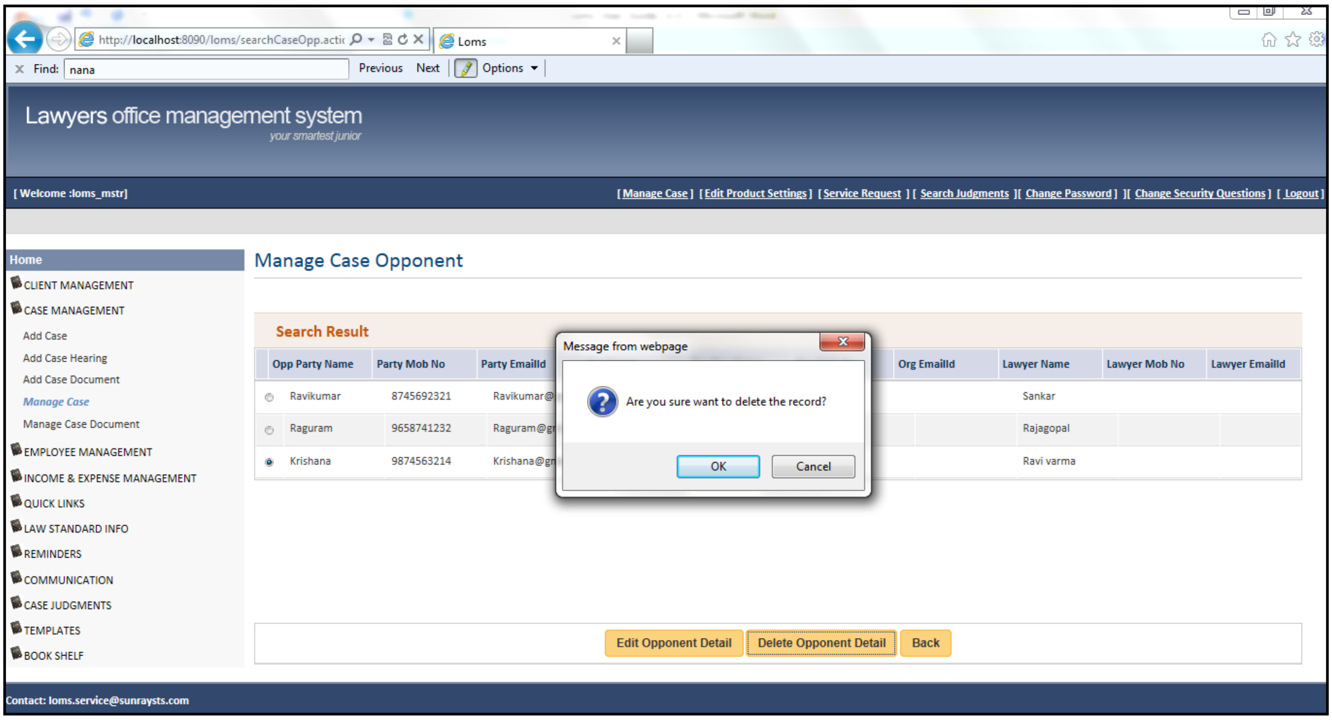
Step 2: Select the case for which you wish to delete an opponent and click on SEARCH OPPONENT button.



Step 3: Once the user clicks on SEARCH button, the application will load with all the opponent information for that particular case.



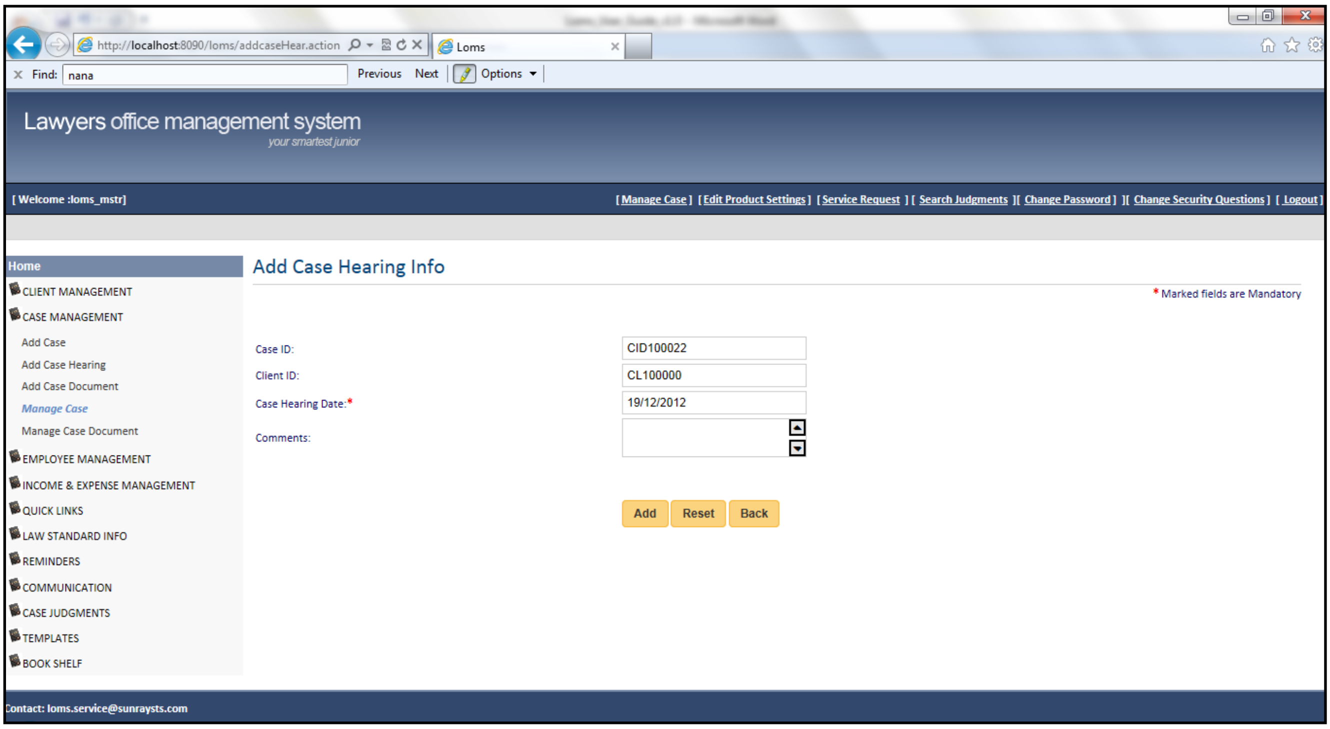
Step 4: Select the Opponent you want to delete and click on the DELETE OPPONENT DETAIL button. A pop up will show up with the message, **"Are you sure want to delete the record?"** Click **YES** to delete the record else click on **CANCEL.**



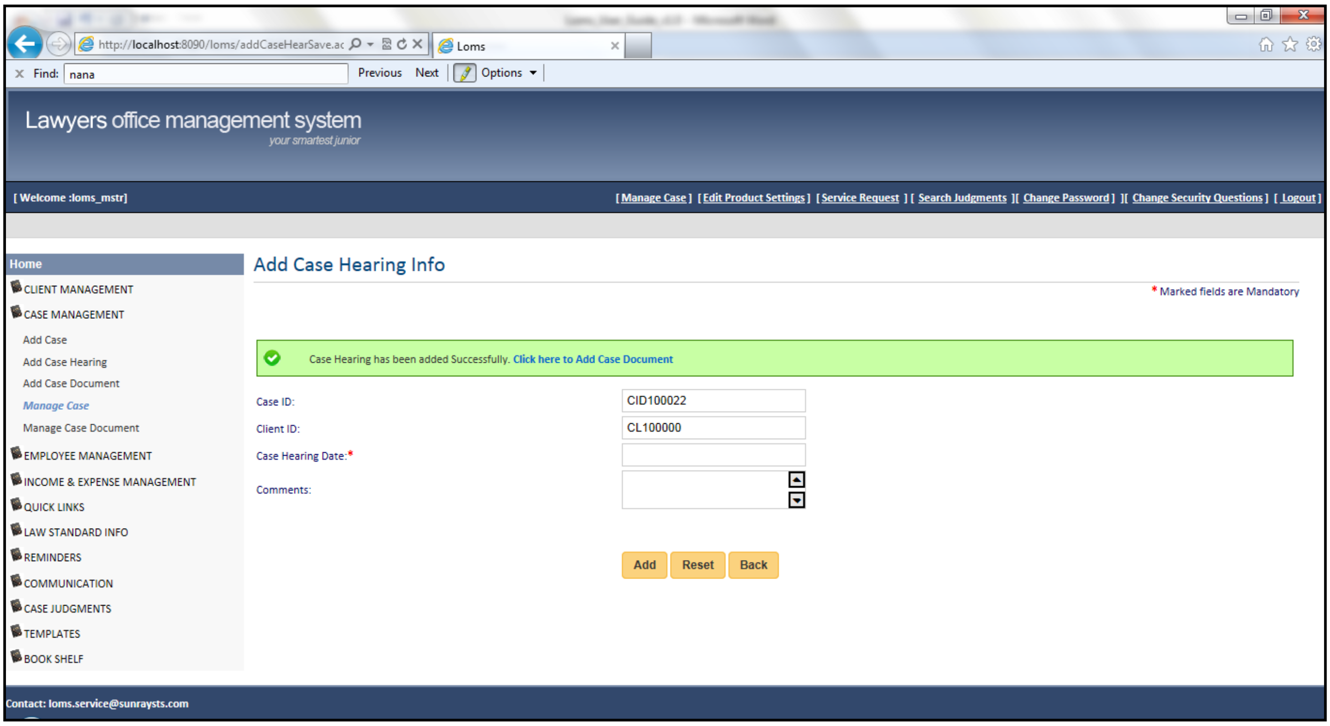
2.9 Add Case Hearing Information

Step 1: Search for CASE INFORMATION as explained in the "**SEARCH CASE INFORMATION**" section

Step 2: Select the case for which you would like to add a case hearing and click on the ADD CASE HEARING button



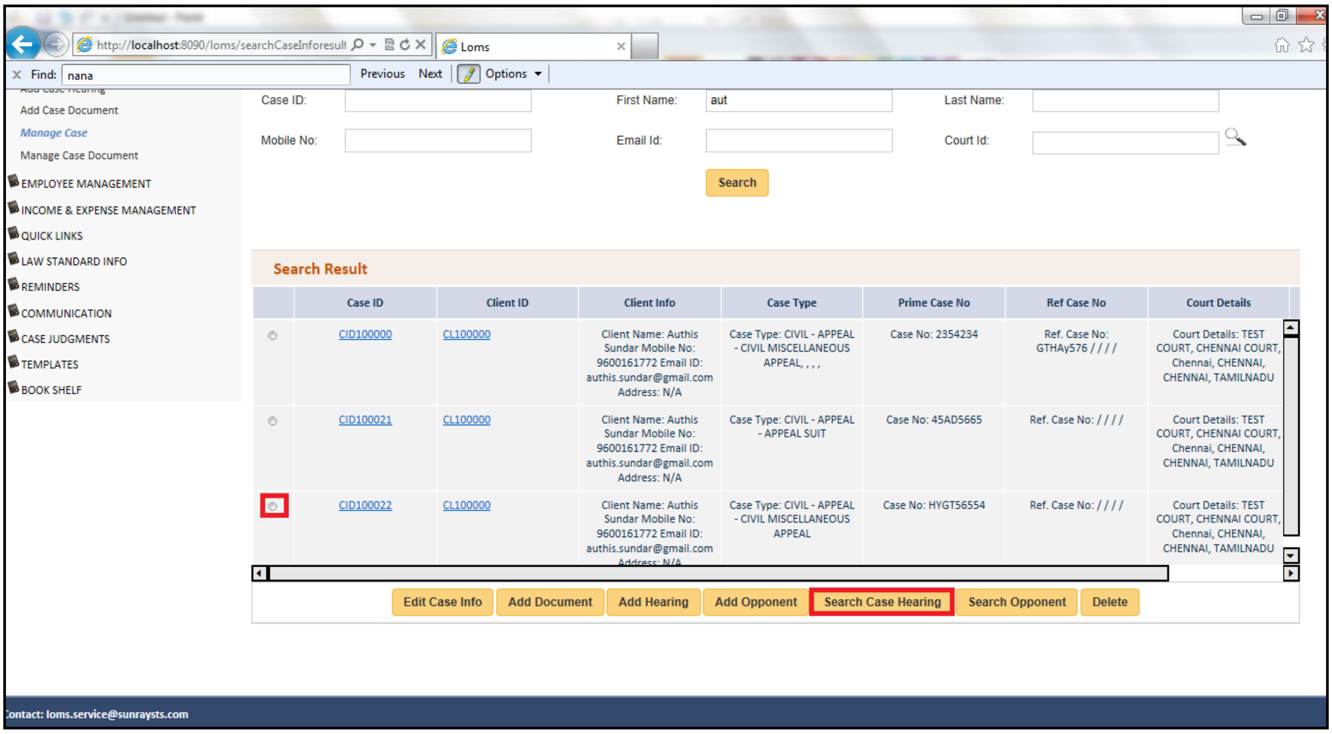
Step 3: Enter the Case Hearing date and click on the ADD button (The Client ID and Case ID will be auto populated). Once the Case Hearing details are added to the database, the application will give a message "***Case Hearing has been added successfully. Click here to add Case Document".***



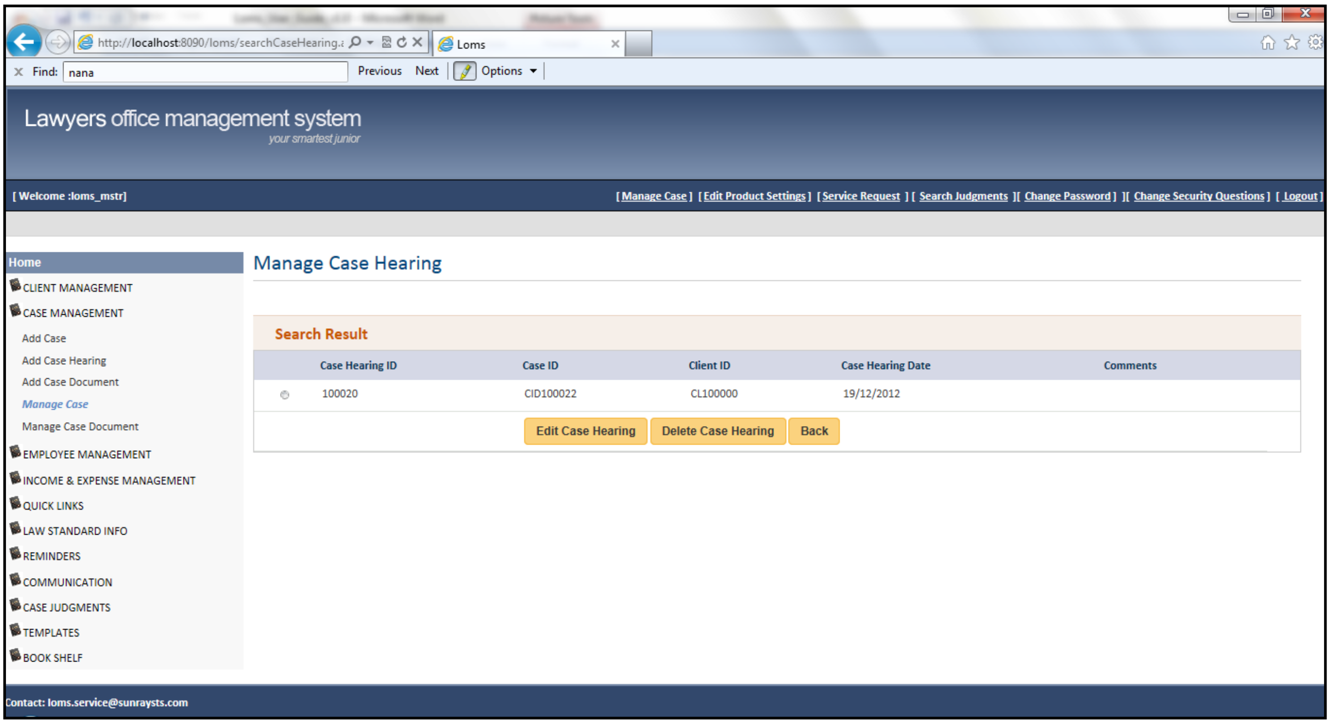
2.10 Search Case Hearing Information

Step 1: Search for CASE INFORMATION as explained in the "**SEARCH CASE INFORMATION**" section

Step 2: Select the case for which you would like to Search the Case Hearing and click on SEARCH CASE HEARING button.



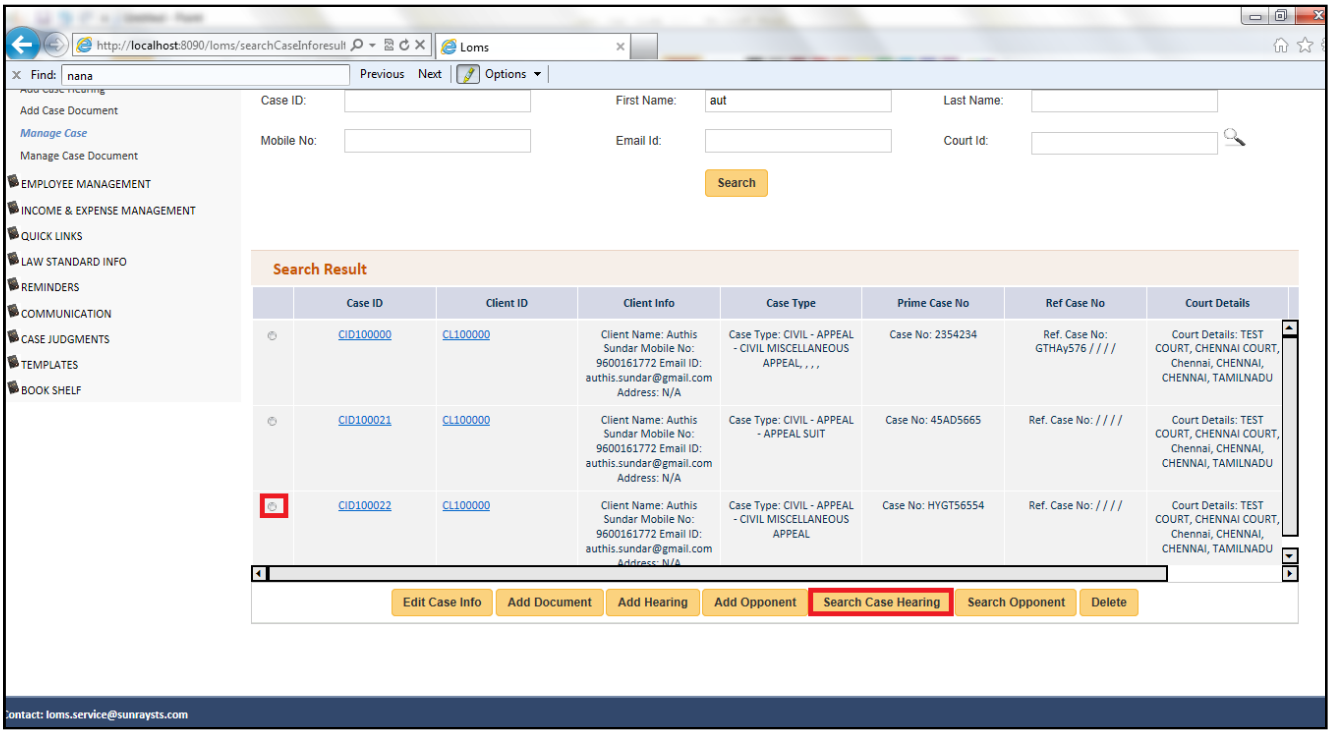
Step 3: When the user clicks on the SEARCH CASE HEARING button the application will list all the case hearing(s) corresponding to that case.



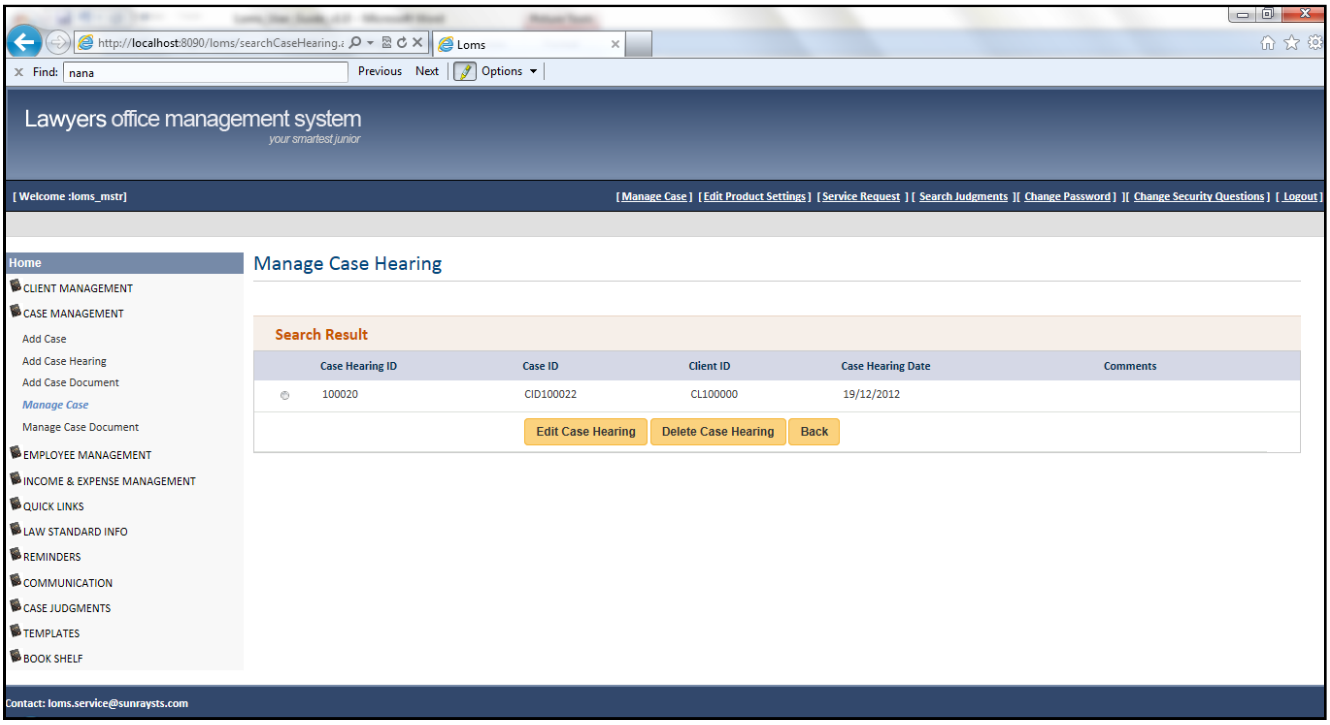
2.11 Delete Case Hearing Information

Step 1: Search for CASE INFORMATION as explained in the "**SEARCH CASE INFORMATION**" section

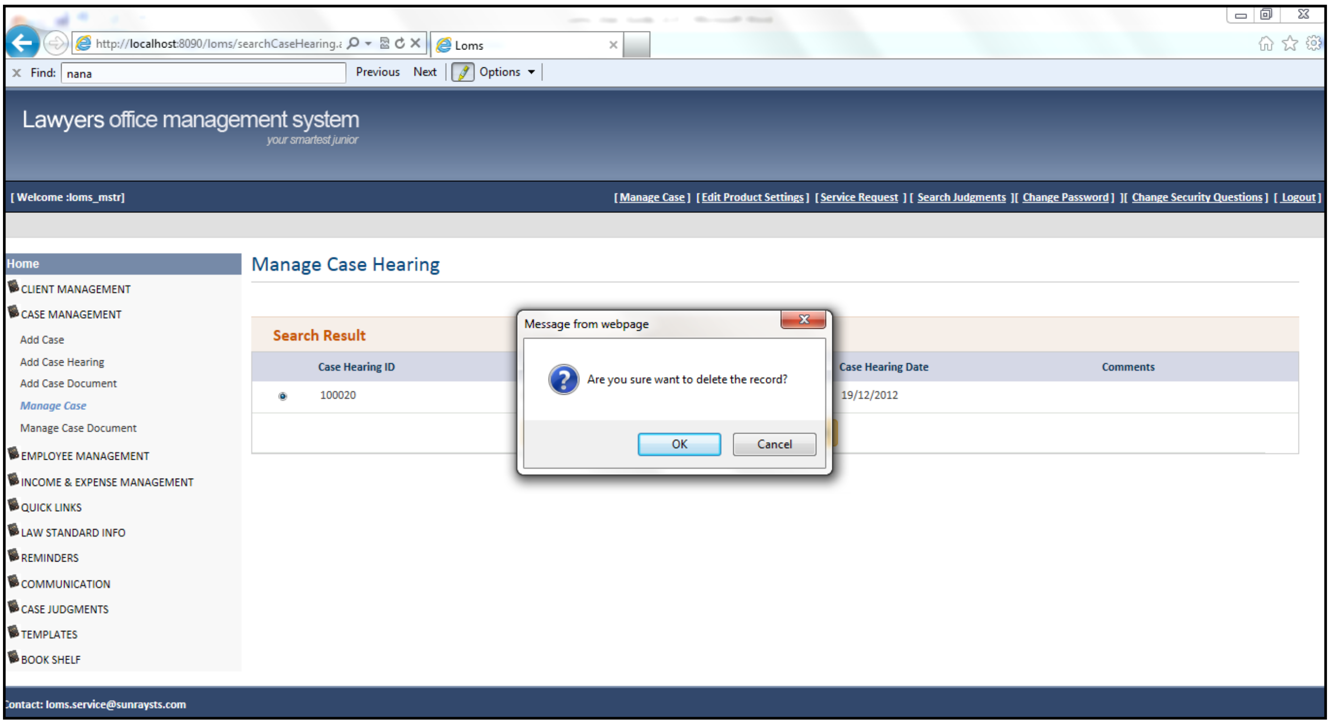
Step 2: Select the case for which you want to find a Case Hearing and click on SEARCH CASE HEARING button.



Step 3: Once the user clicks on the SEARCH CASE HEARING button the application will list all the case hearings for that particular case.



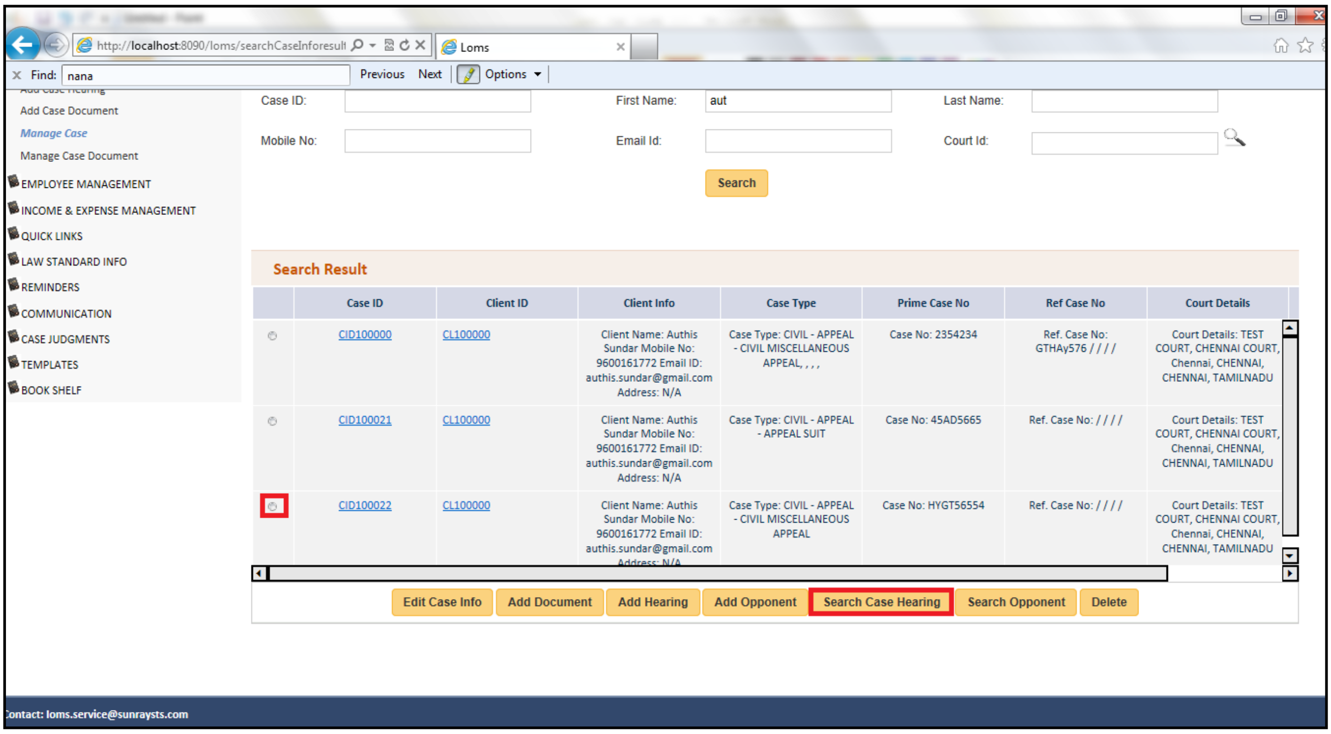
Step 4: Select the Case Hearing you wish to Delete and click on DELETE CASE HEARING button. A pop up window will open up with the message, **"Are you sure want to delete the record?"** Click **YES** to delete else click on **CANCEL.**



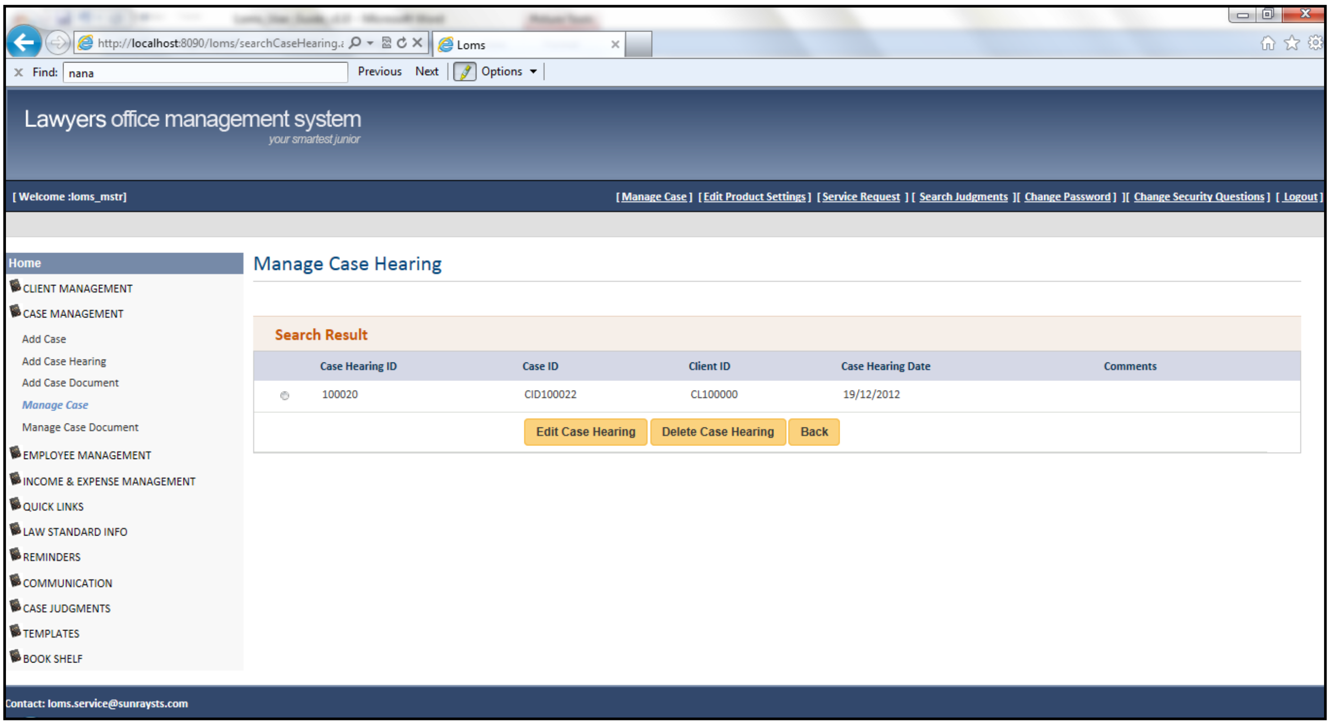
2.12 Modify Case Hearing Information

Step 1: Search for CASE INFORMATION as explained in the "**SEARCH CASE INFORMATION**" section

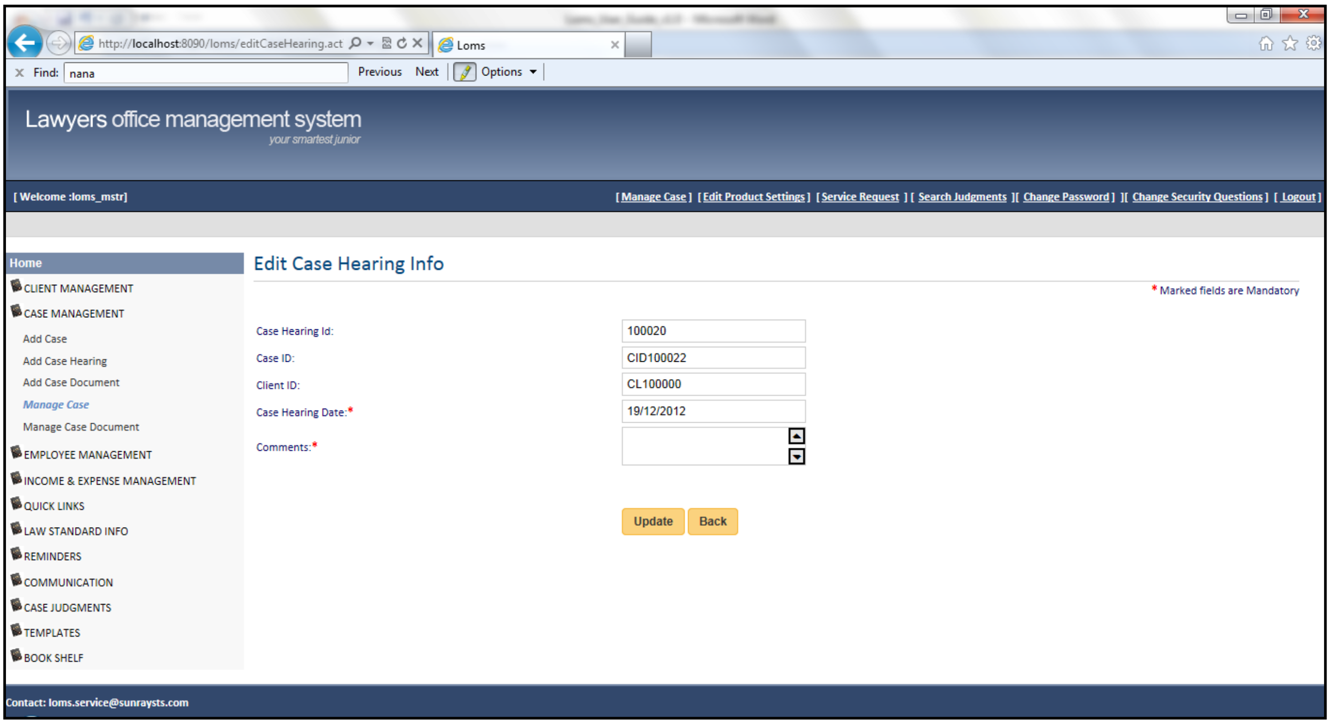
Step 2: Select the case for which you want to modify the case hearing and click on Search Case Hearing button.



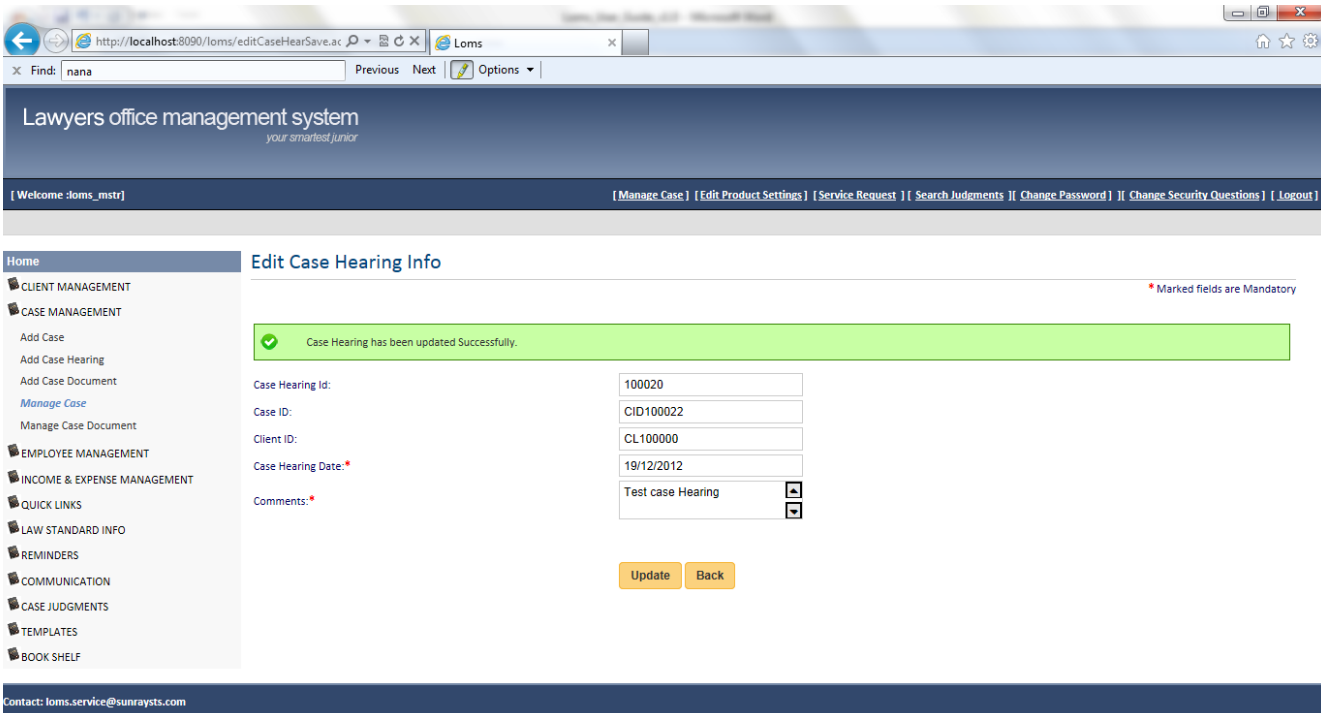
Step 3: Once the user clicks on the SEARCH CASE HEARING button the application will list all the case hearings for that particular case.



Step 4: Select the Case Hearing you wish to Modify and click on EDIT CASE HEARING button.



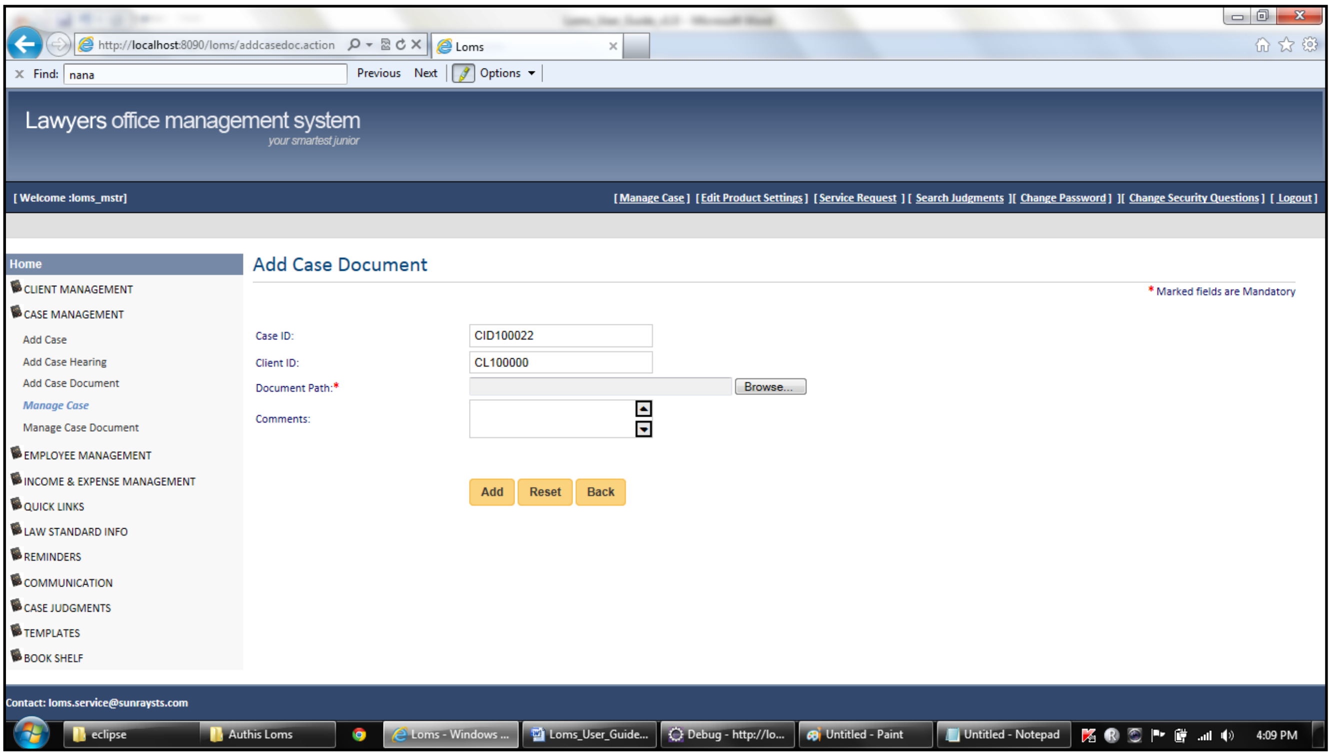
Step 5: Edit the Case Hearing detail and click on the UPDATE button. Once the Case Hearing details are updated to the database, the application will give a message ***"Case Hearing has been updated successfully".***



2.13 Upload Case Document

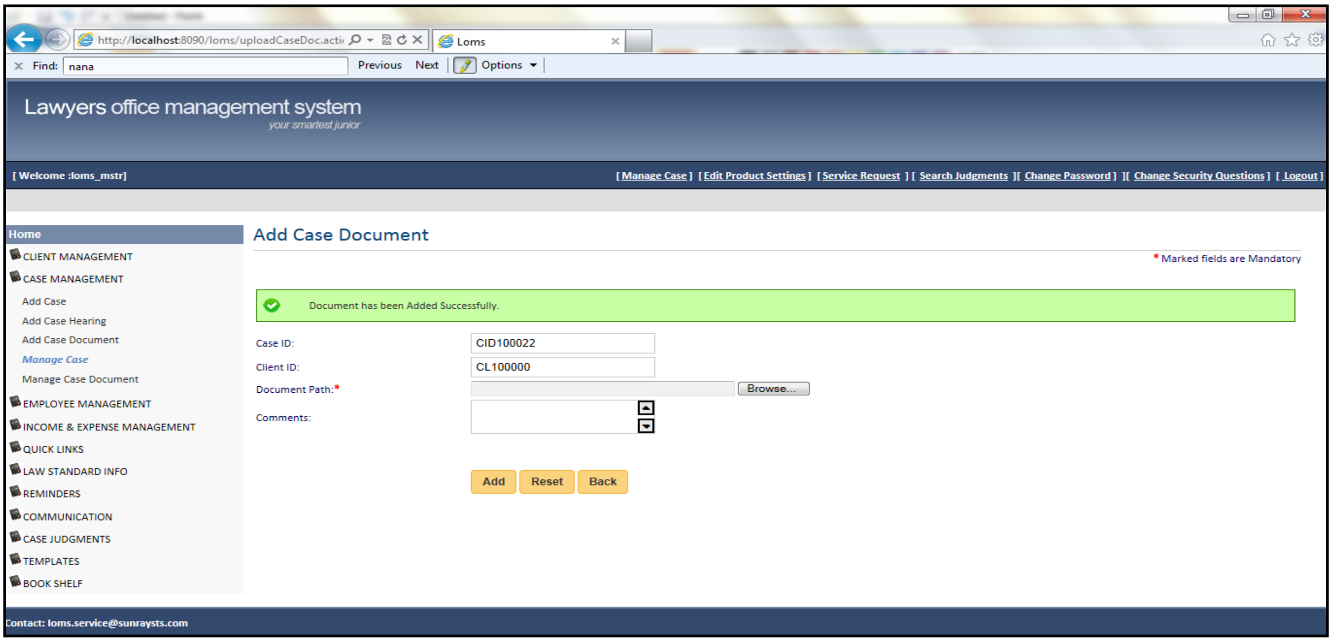
Step 1: Search for CASE INFORMATION as explained in the "**SEARCH CASE INFORMATION**" section

Step 2: Select the Case Id for which you would like to upload a Document and click on ADD CASE DOCUMENT button



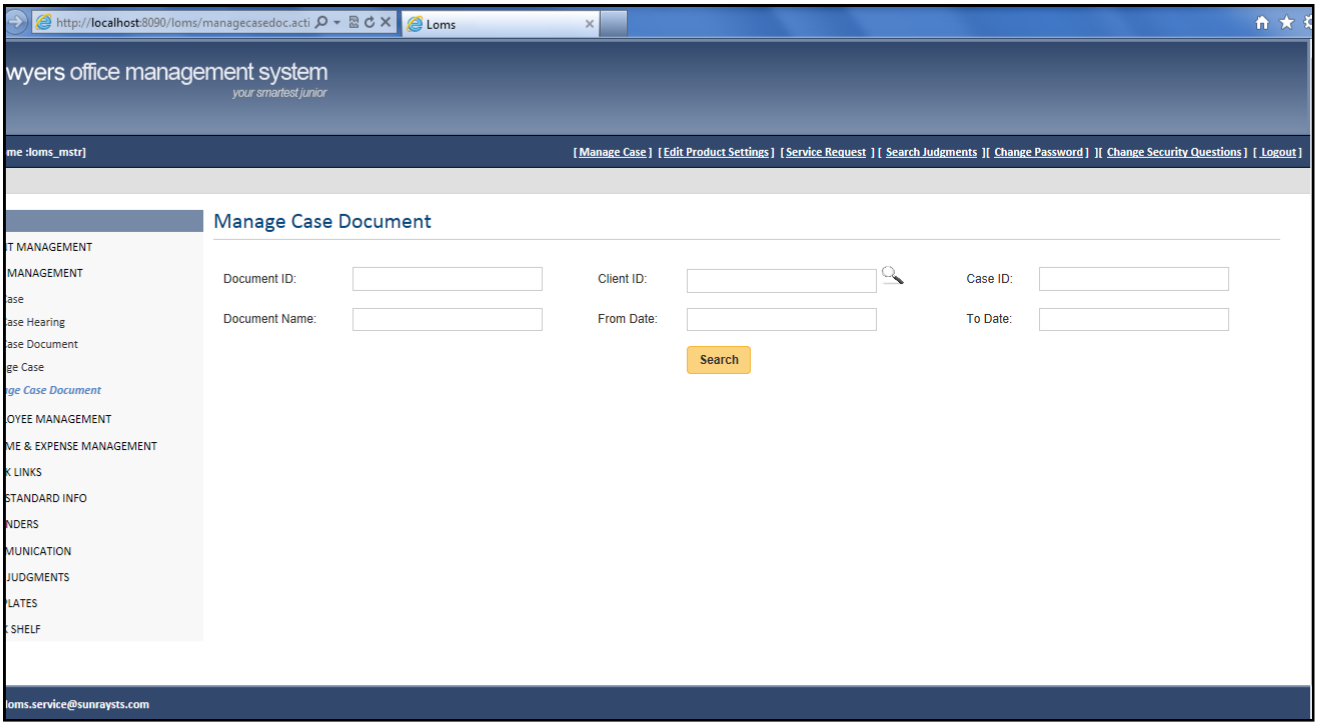
Step 3: Browse and locate the Case Document and click on the Add button. Once the Case Document is added to the database, the application will give a message ***"Document has been added successfully".***

NOTE: Case Document is a mandatory field. The application will not allow the user to add a case document without the value for this field. Case Document size cannot exceed 5 MB.

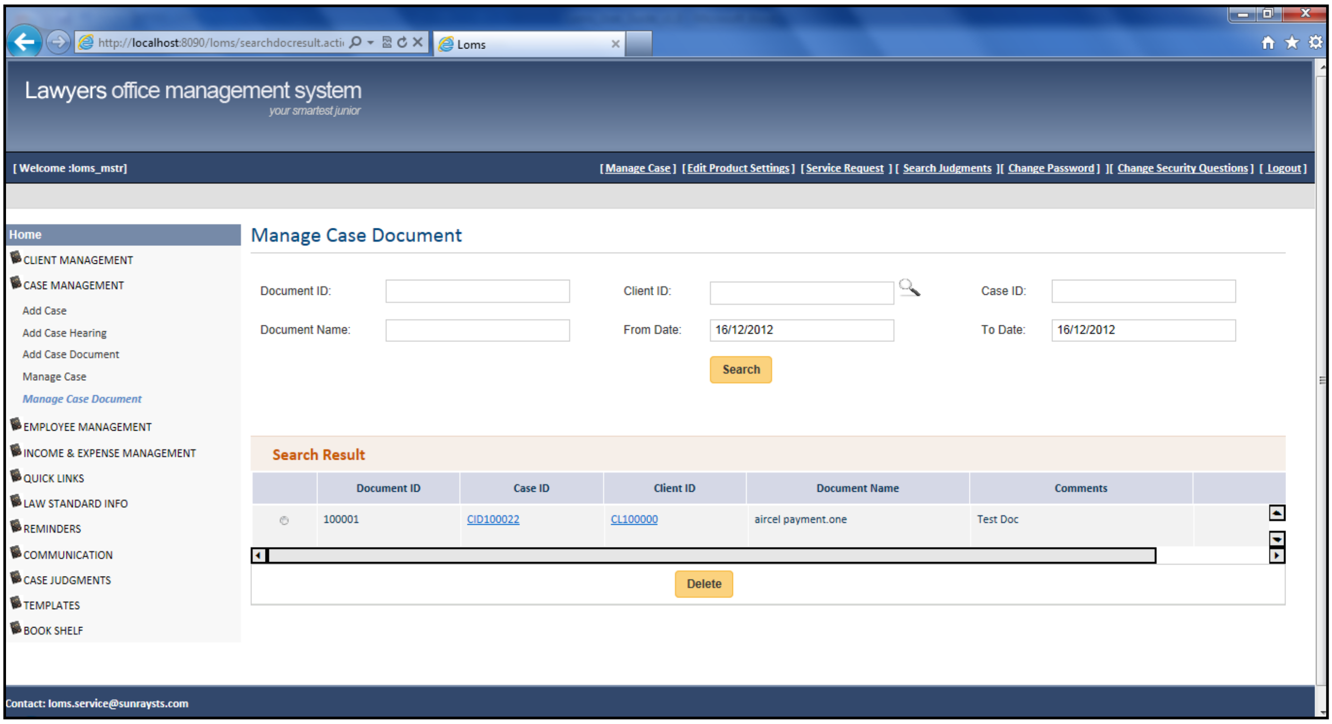


2.14 Search Case Document

Step 1: Navigate to CASE MANAGEMENT > MANAGE CASE DOCUMENT link

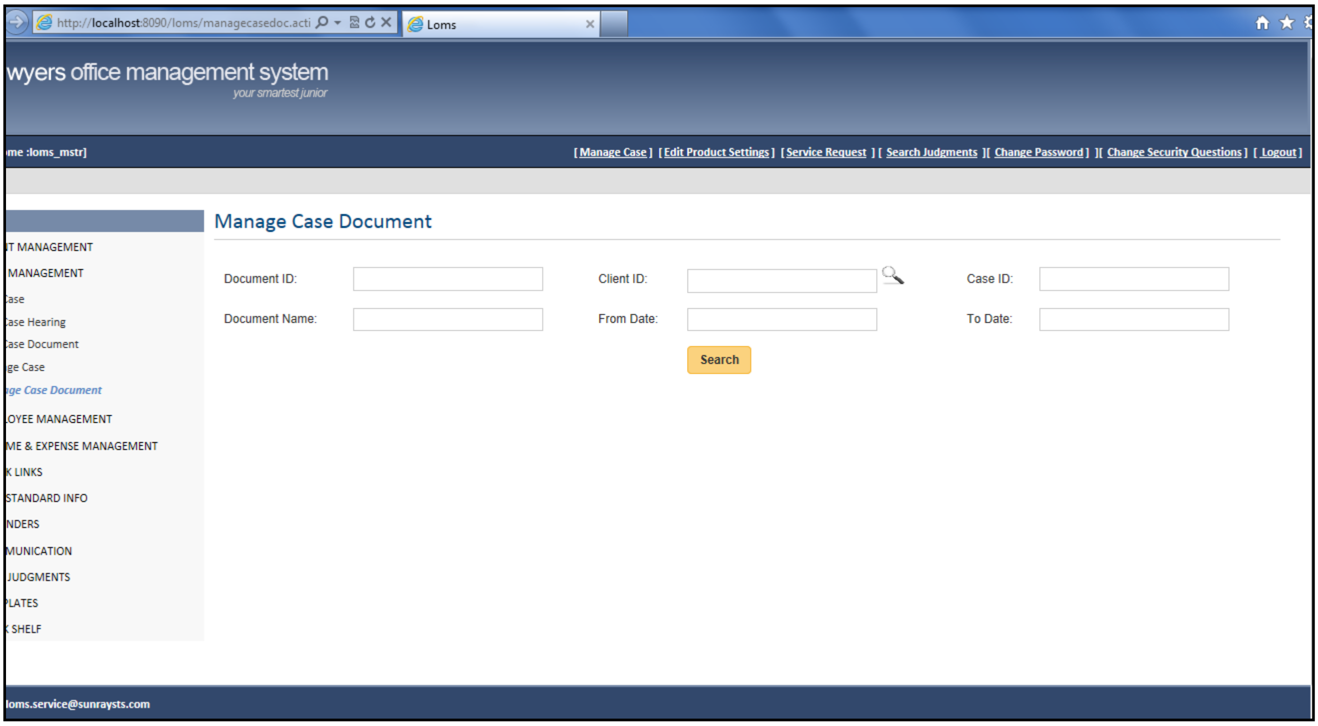


Step 2: Enter the value for any one of the field (Document ID / Client ID / Case ID / Document Name) or a Date range in From Date and To Date as shown below and click search button

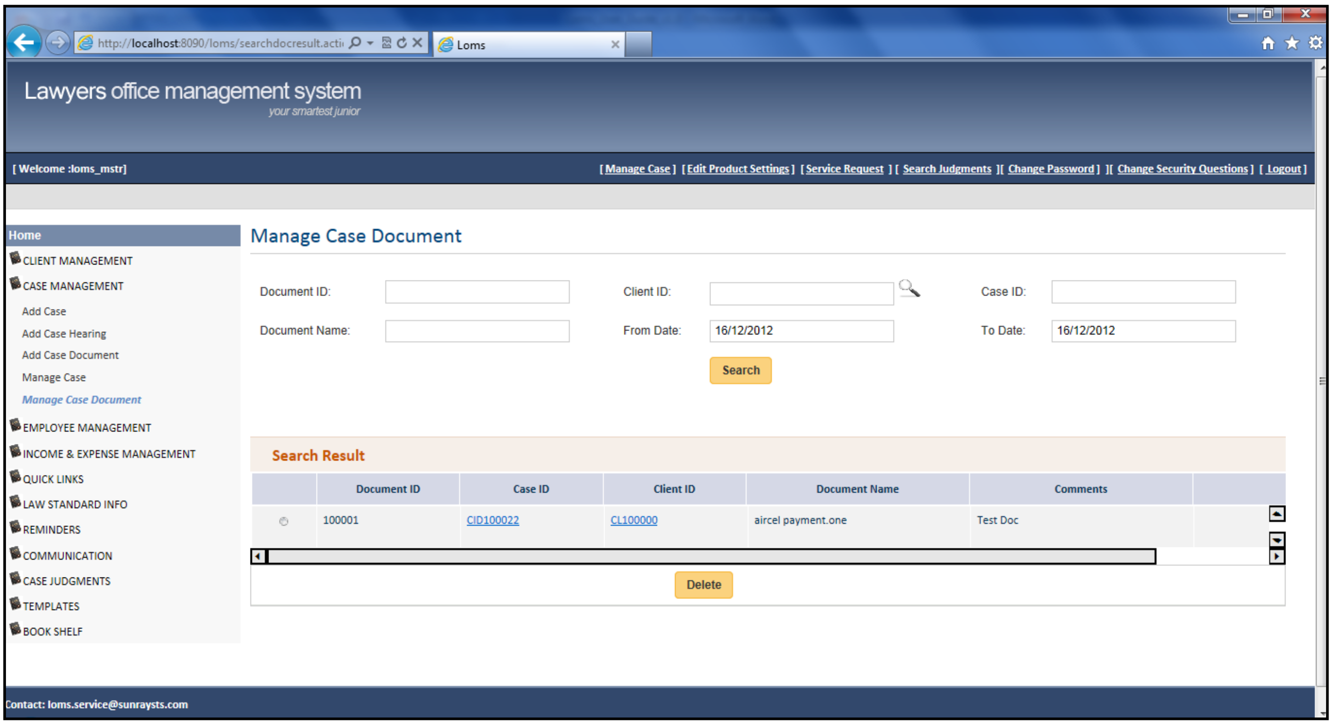


2.15 Download Case Document

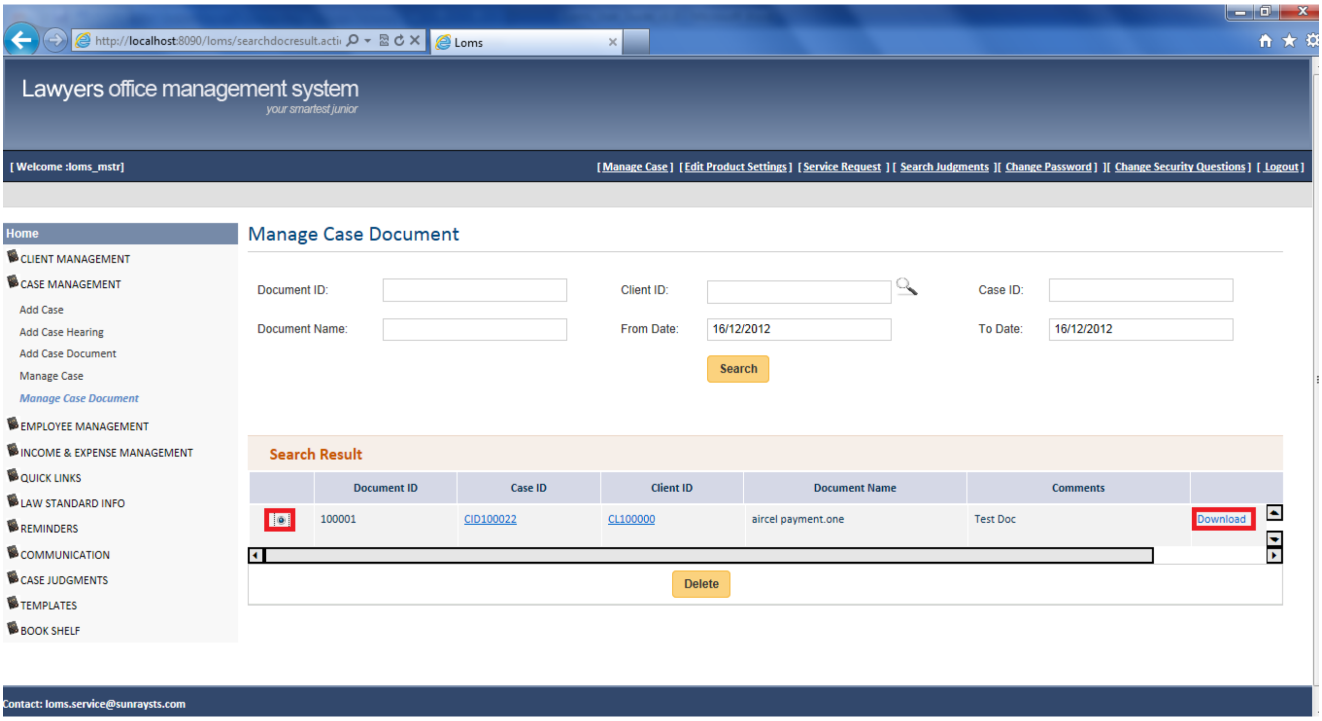
Step 1: Navigate to CASE MANAGEMENT > MANAGE CASE DOCUMENT link



Step 2: Enter the value for any one of the field (Document ID / Client ID / Case ID / Document Name) or a Date range in From Date and To Date as shown below and click search button

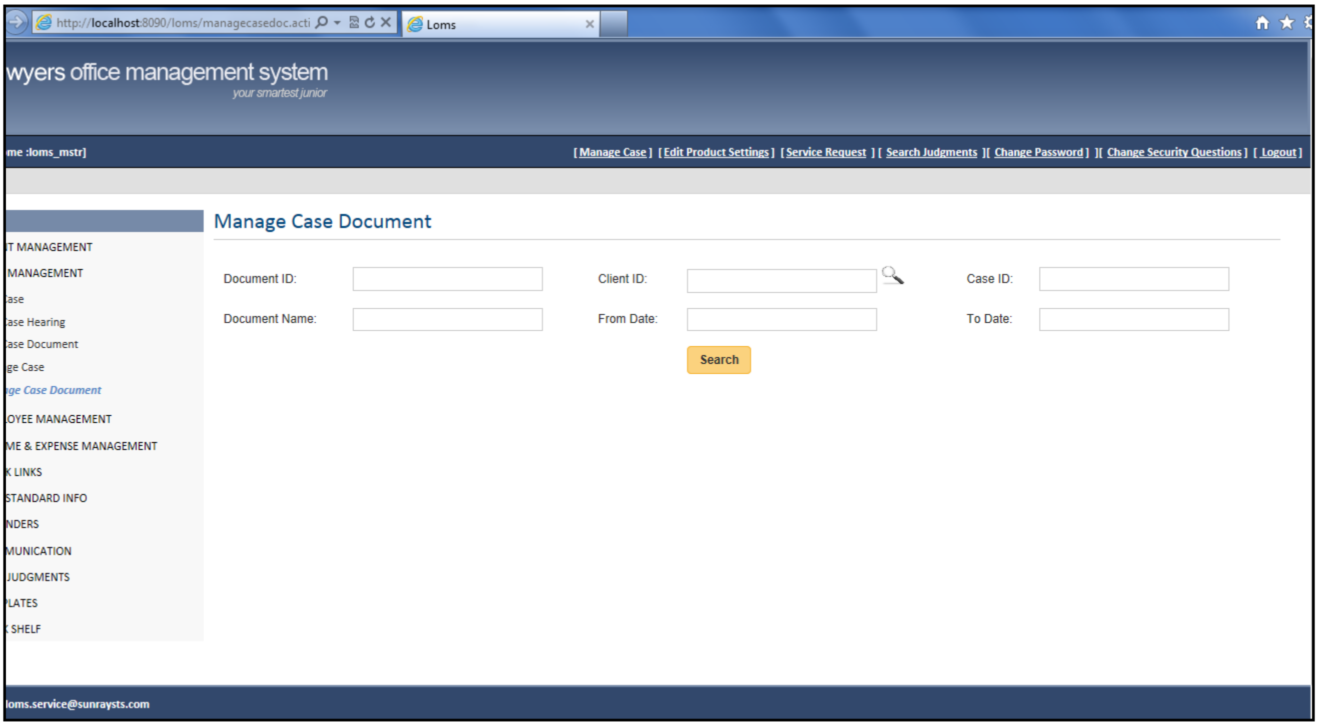


Step 3: Select the document you wish to download and click on the Download link that appears in the right end of the grid to download the document.

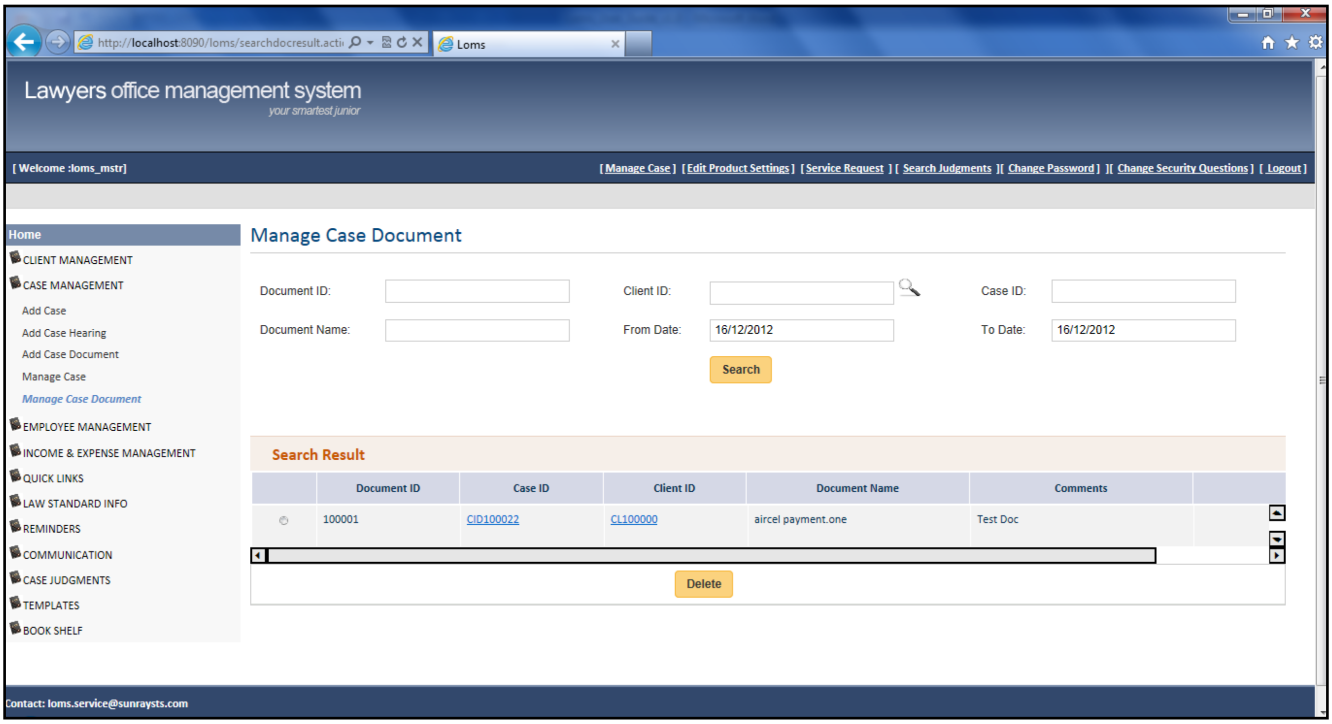


2.16 Delete Case Document

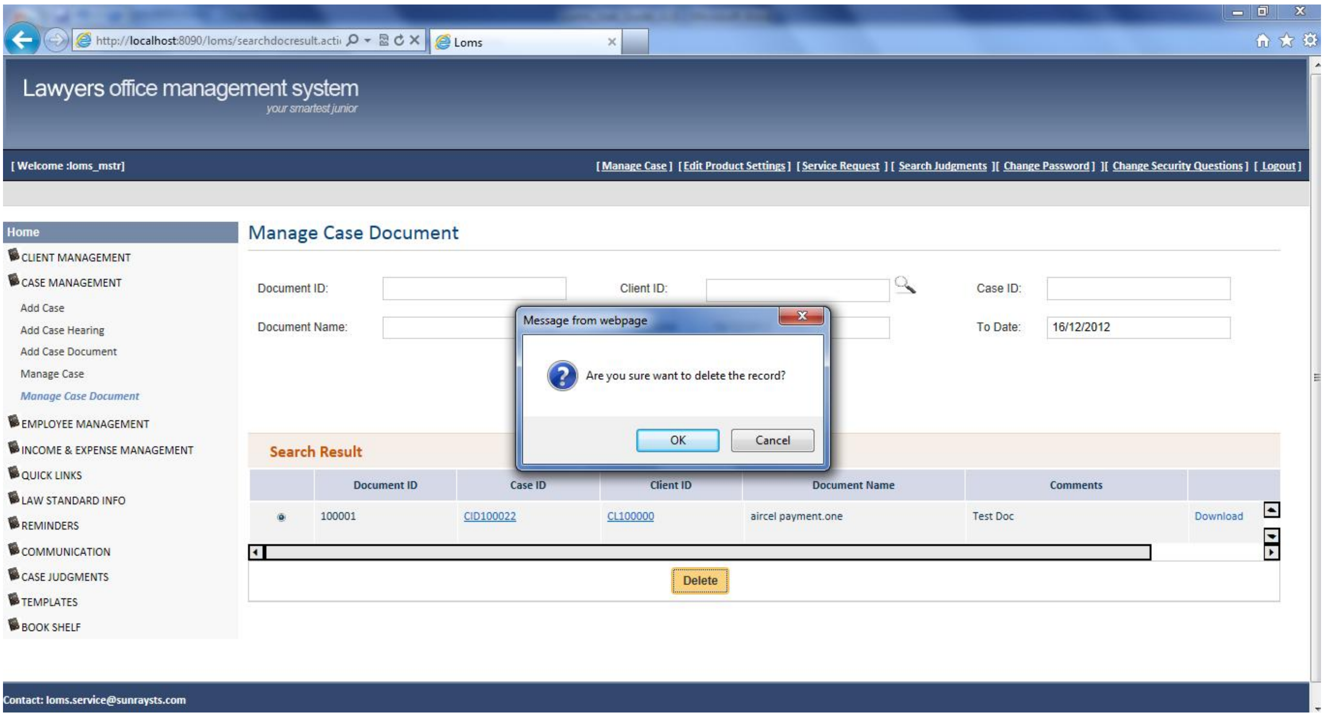
Step 1: Navigate to CASE MANAGEMENT > MANAGE CASE DOCUMENT link



Step 2: Enter the value for any one of the field (Document ID / Client ID / Case ID / Document Name) or a Date range in From Date and To Date as shown below and click SEARCH button



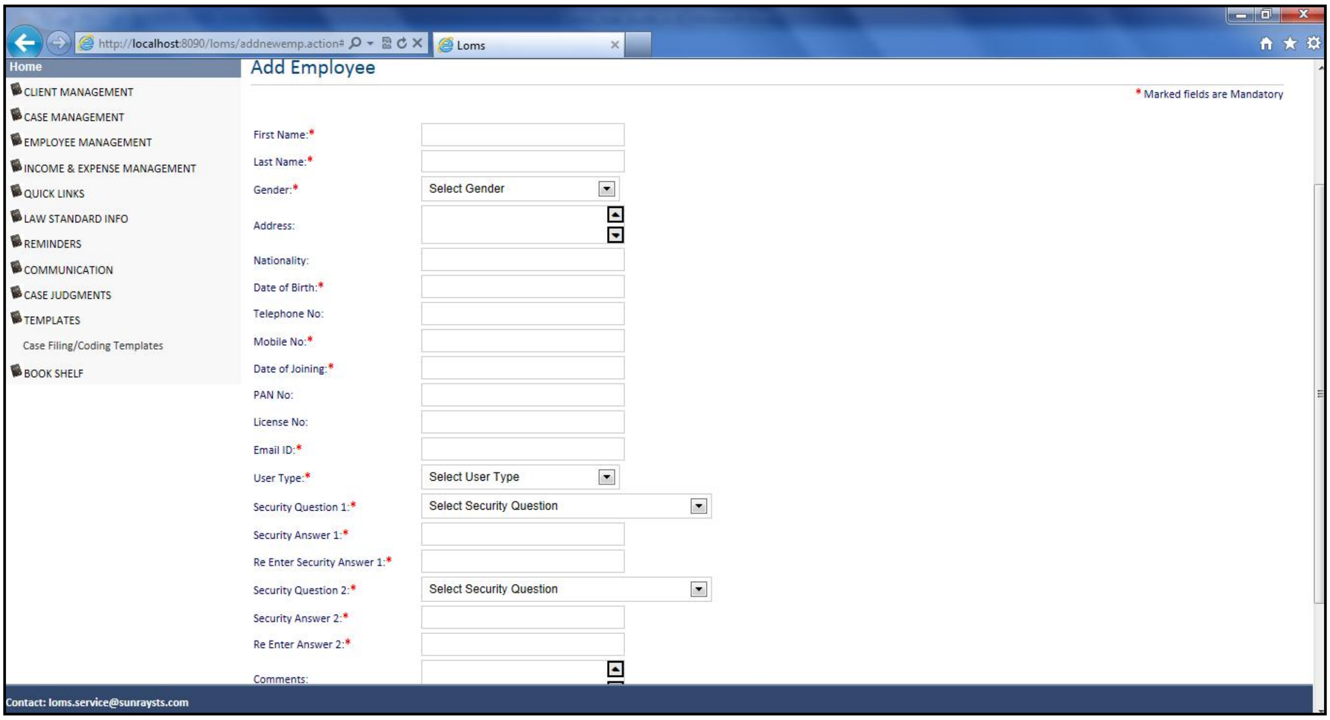
Step 3: Select the document you wish to delete and Click on the Delete button. A pop up will show up with the message, **"Are you sure want to delete the record?"** Click **YES** to delete else click on **CANCEL.**



3. EMPLOYEE MANAGEMENT

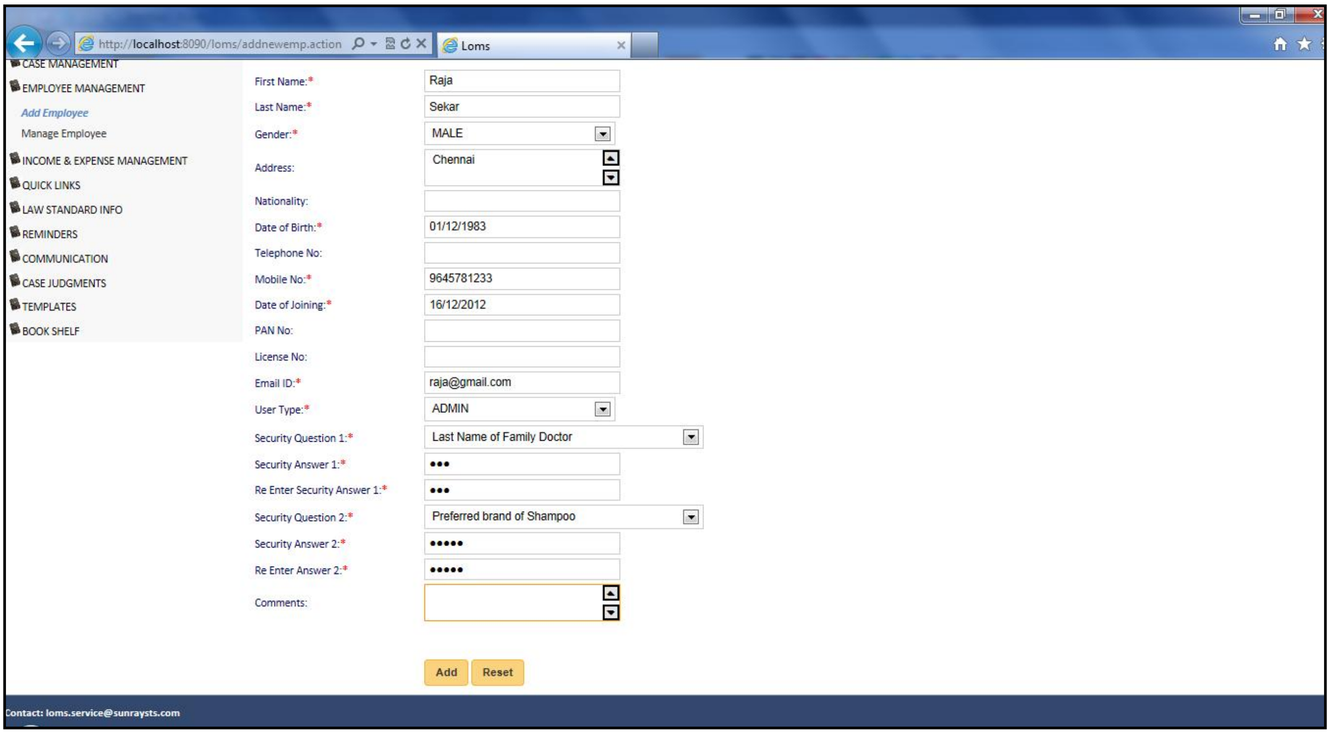
3.1 Add Employee Information

Step 1: Navigate to EMPLOYEE MANAGEMENT > ADD EMPLOYEE link



Step 2: Enter the details of the Employee in the page as shown below,

NOTE: Employee's **First Name, Last Name, Gender, Date of Birth, Mobile No, Date of Joining, Email ID, User Type Security Question 1, Security Answer 1, Security Question 2 and Security Answer 2** are mandatory fields. The application will not allow the user to add an employee without the value for these fields



Step 3: Click on the Add button as shown in the image above. Once the Employee details are added to the database, the application will give a message

"***Employee Info has been added successfully. Employee ID is: XXXXX***

User Name: XXXXX

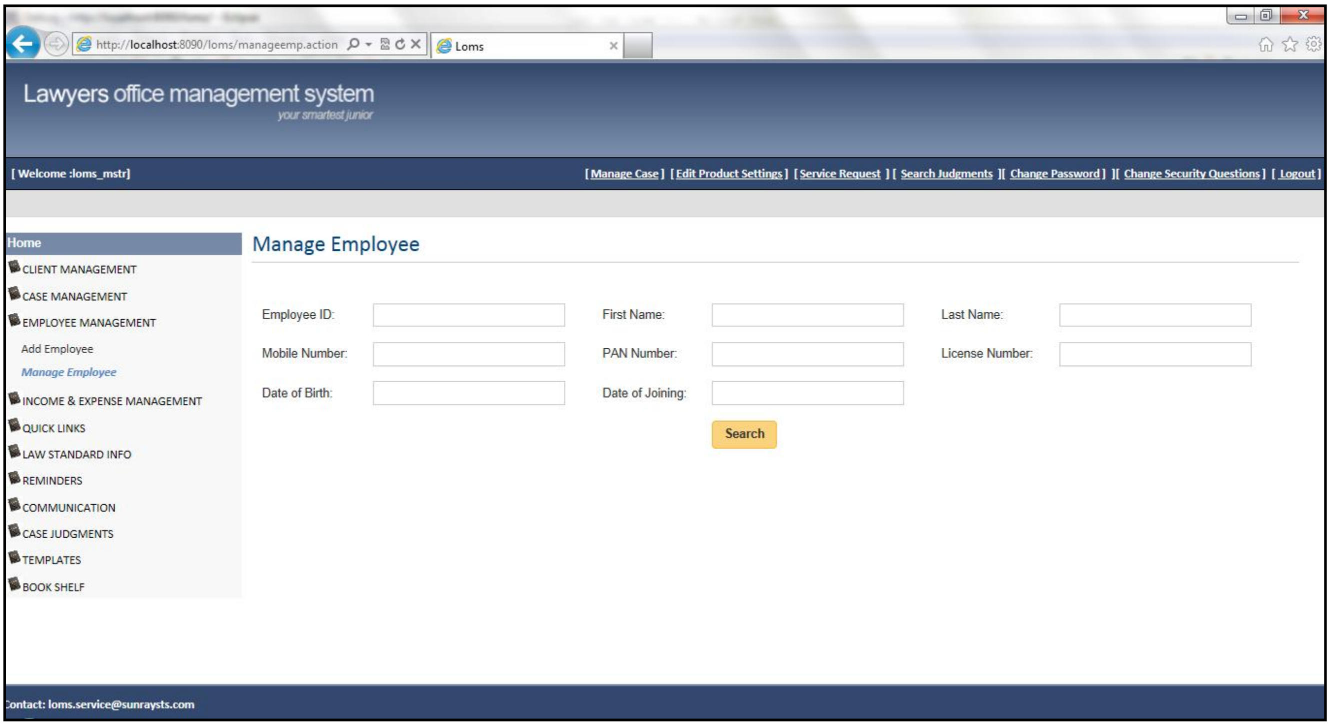
Password: XXXXXX

Your Credentials has been sent to Your Email ID"

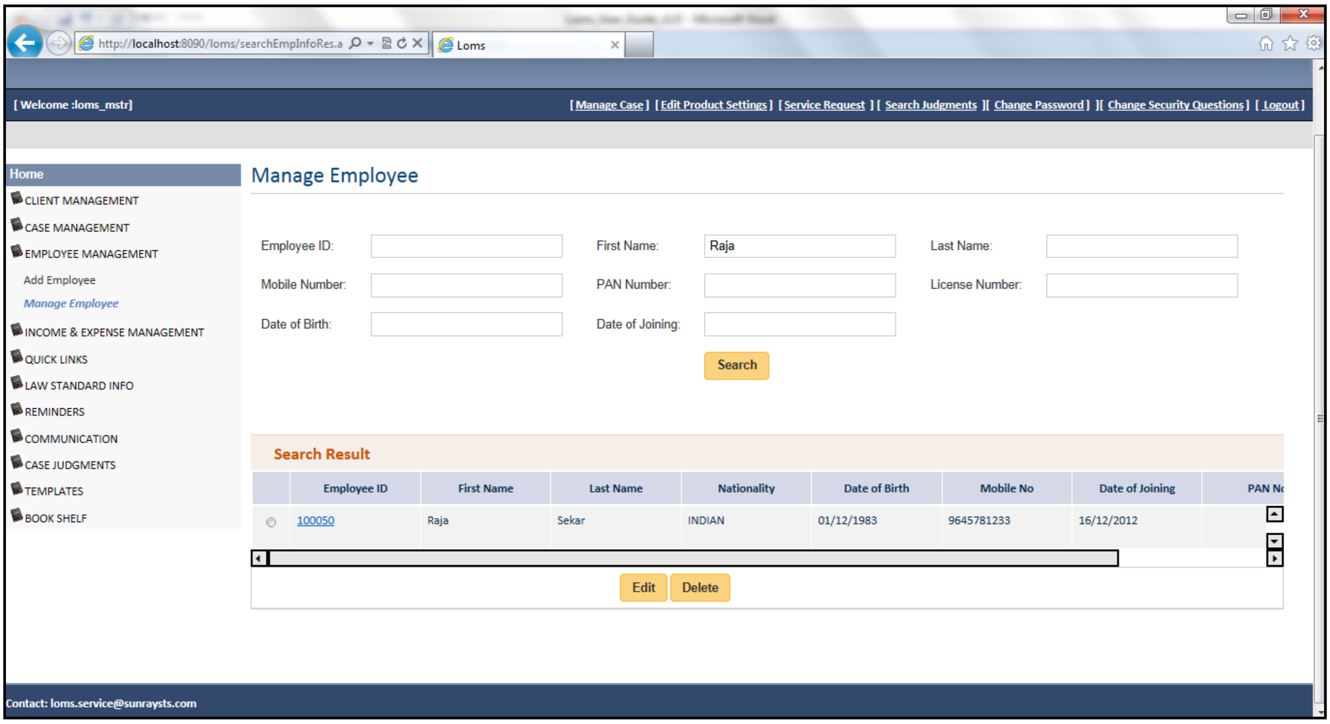
NOTE: Please note down the **EMPLOYEE ID, USERNAME and PASSWORD** for your future reference.

3.2 Search Employee Information

Step 1: Navigate to EMPLOYEE MANAGEMENT > MANAGE EMPLOYEE link

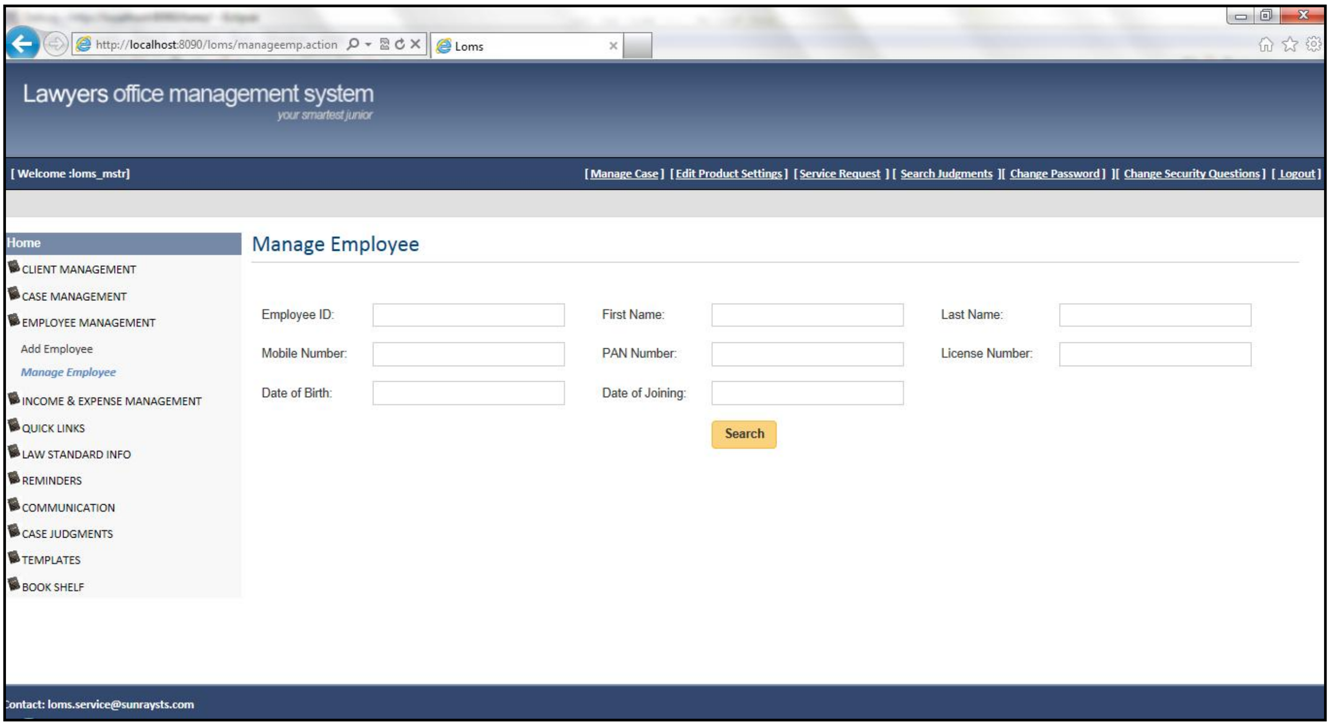


Step 2: Enter the value for any one field (Employee ID / First Name / Last Name / Mobile Number / PAN Number / License Number / Date of Birth / Date of Joining) as shown in the image below and click search button.

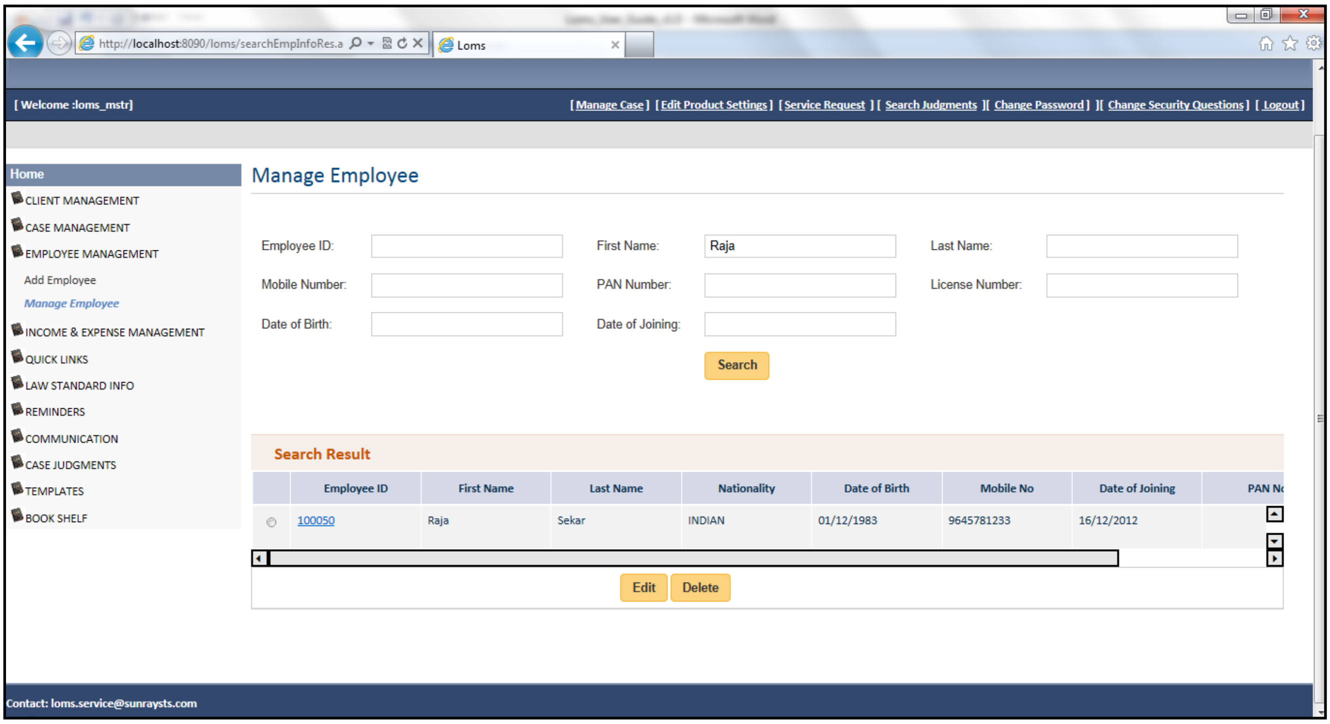


3.3 Update Employee Information

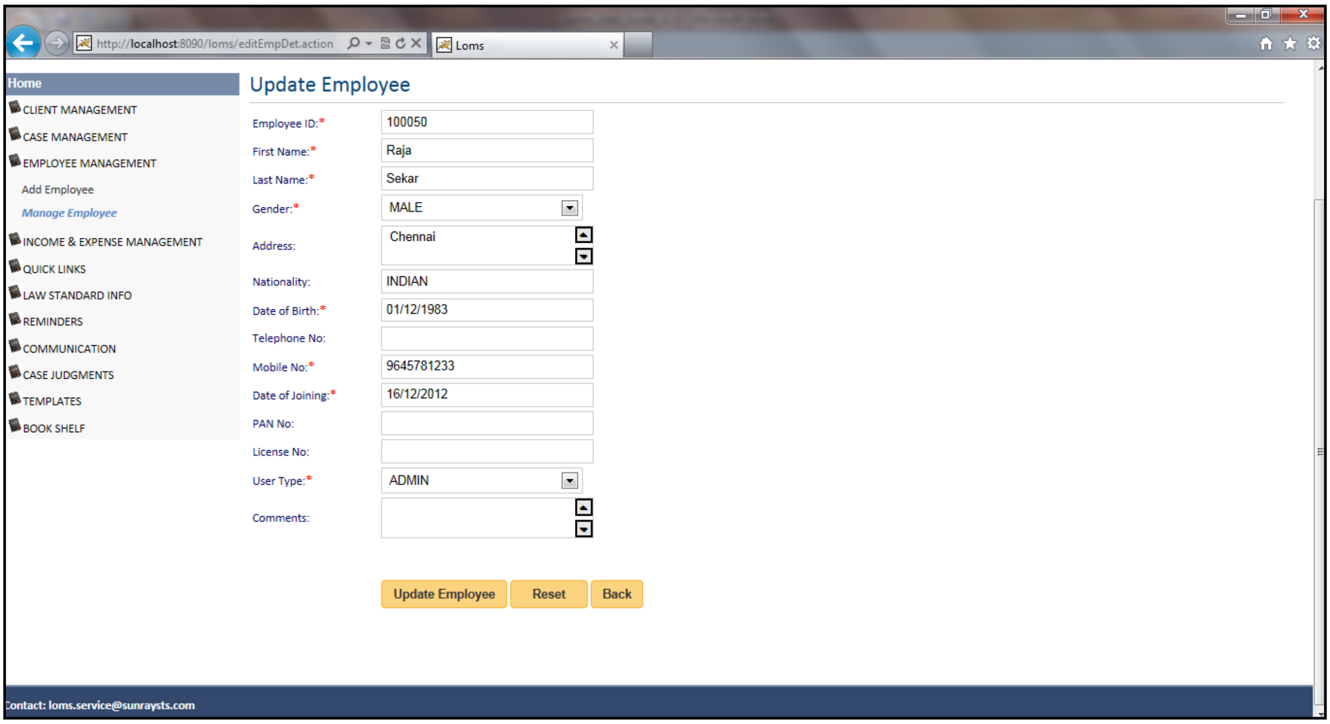
Step 1: Navigate to EMPLOYEE MANAGEMENT > MANAGE EMPLOYEE link



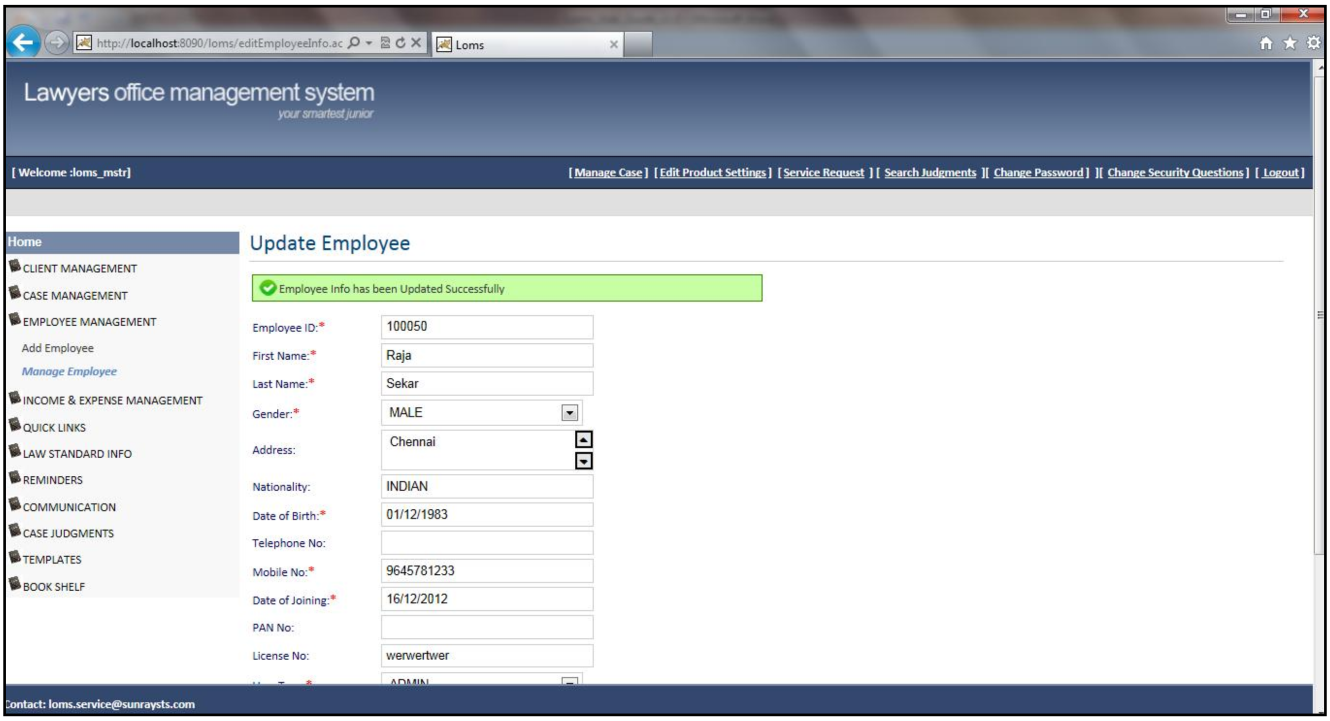
Step 2: Enter the value for any one field (Employee ID / First Name / Last Name / Mobile Number / PAN Number / License Number / Date of Birth / Date of Joining) as shown in the image below and click search button.



Step 3: Select the Employee you wish update and click on EDIT button.

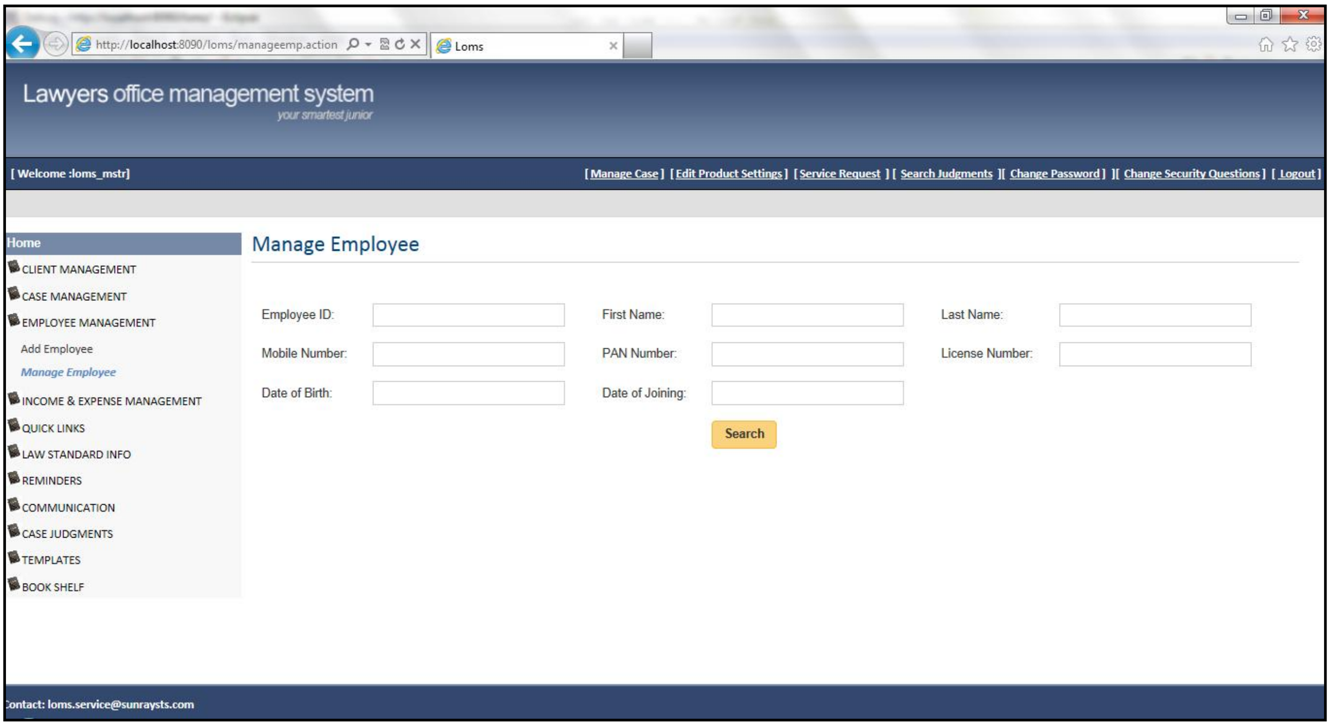


Step 4: Edit the Employee details and click on UPDATE EMPLOYEE button. Once the Employee details are updated to the database, the application will give a message ***"Employee Info has been updated successfully".***

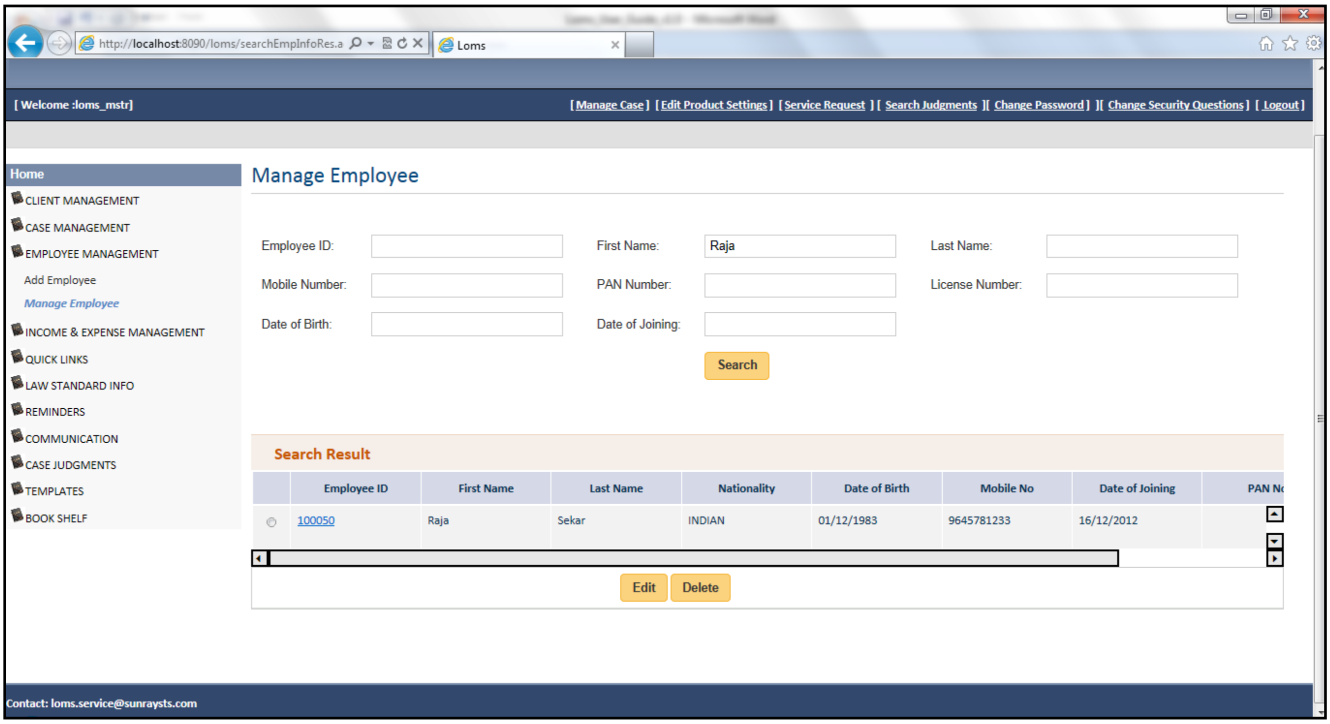


3.4 Delete Employee Information

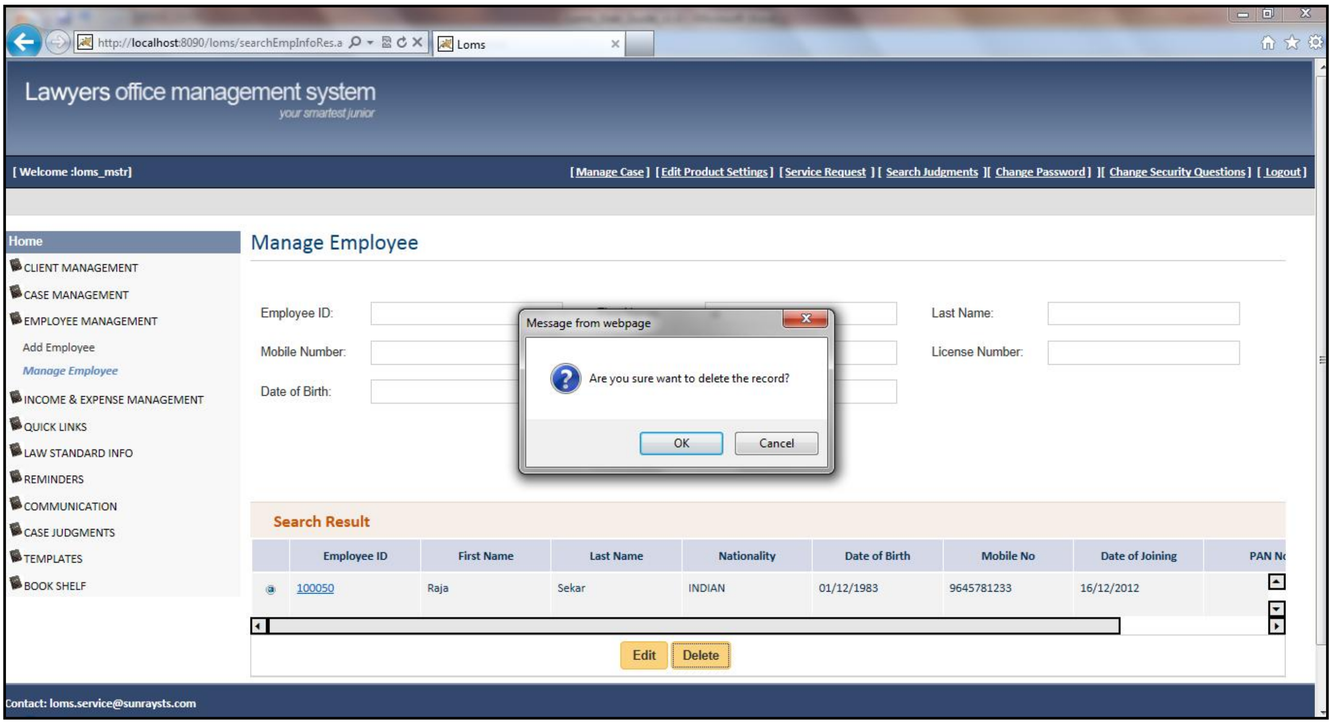
Step 1: Navigate to EMPLOYEE MANAGEMENT > MANAGE EMPLOYEE link



Step 2: Enter the value for any one field (Employee ID / First Name / Last Name / Mobile Number / PAN Number / License Number / Date of Birth / Date of Joining) as shown in the image below and click search button.



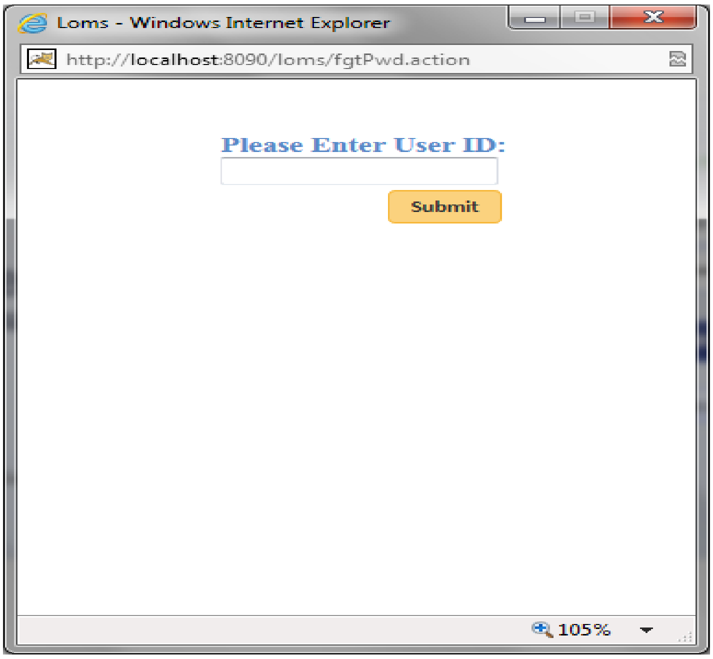
Step 3: Select the Employee you wish to Delete and click on Delete button. A pop up will come up with the message, **"Are you sure want to delete the record?"**Click **YES** to delete else click on **CANCEL.**



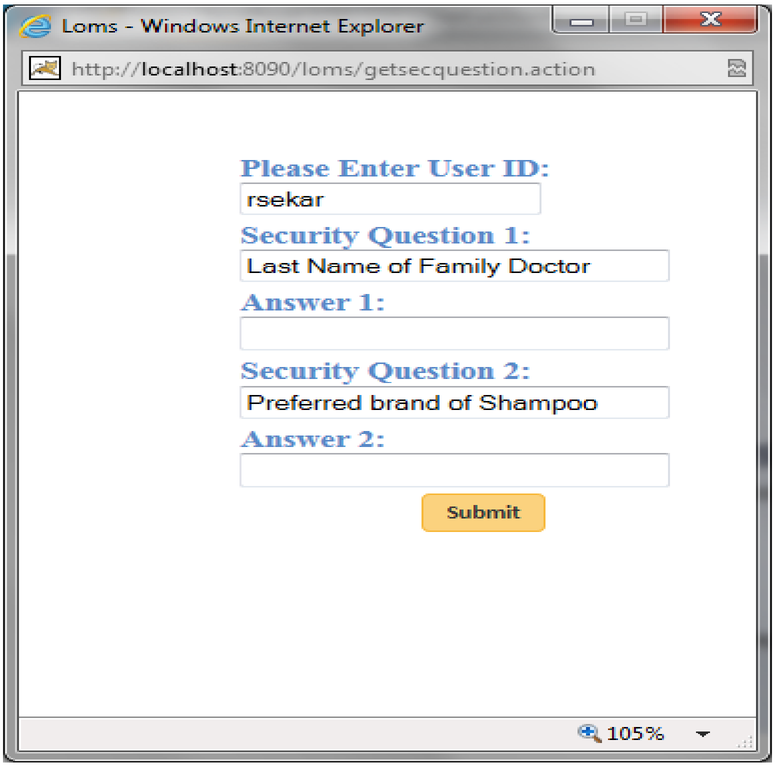
3.5 Forgot Password

Step 1: If a user has forgot his / her application password. Please click on the link "***Lost your username and password? Find it here***"

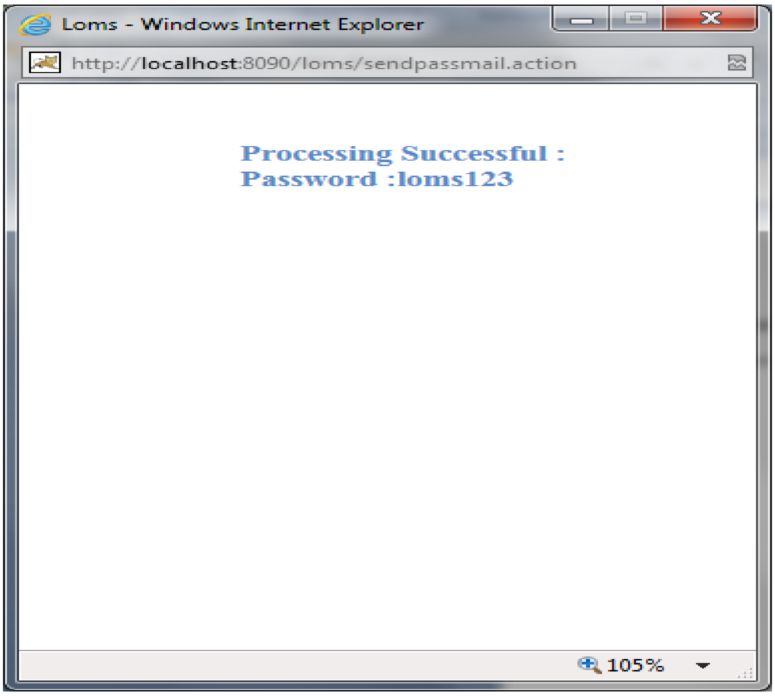
Step 2: A pop up window will come up asking for the User ID. Please enter your username and click on the SUBMIT button.



Step 3: The application will load the security questions you would have set at the time of creating the user and ask for the security answers. Please enter the correct answers and click on SUBMIT button.

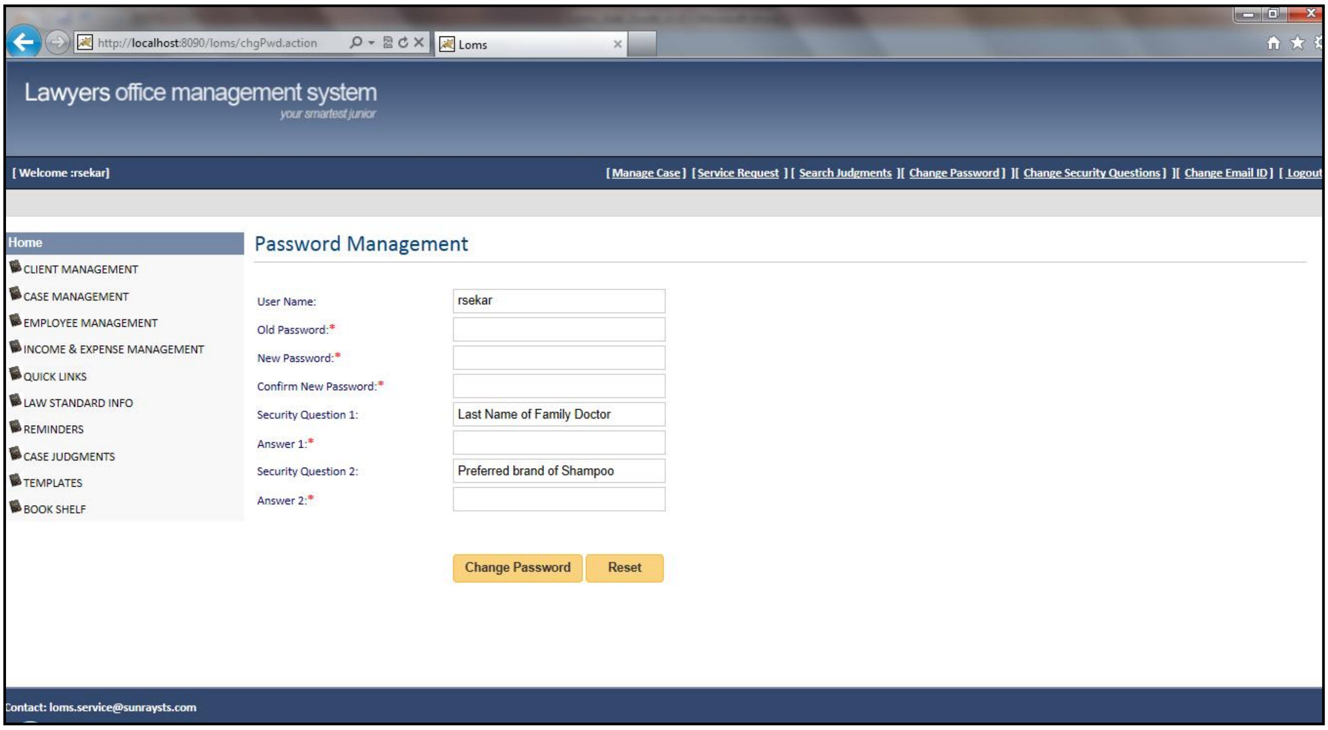


Step 4: Enter valid answers for those questions and click enter. An email will be sent to the registered email id and also it will be displayed in the screen as shown below,



3.6 Change Password

Step 1: Click on CHANGE PASSWORD link in the Header, a page would be loaded as shown below,

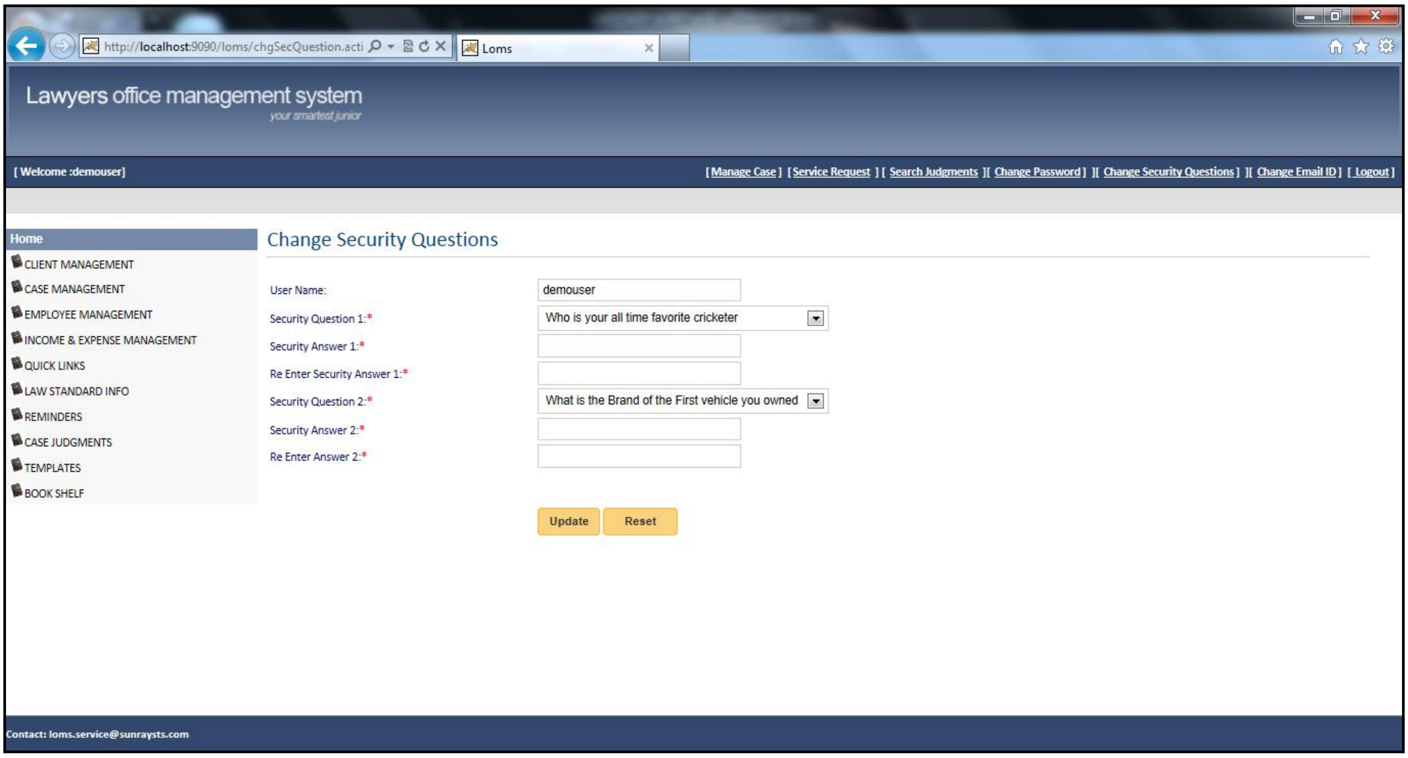


Step 2: Enter your old password, new password, confirm new password, Answer 1 for Security question 1 and Answer 2 for Security Question 2 and click CHANGE PASSWORD button.

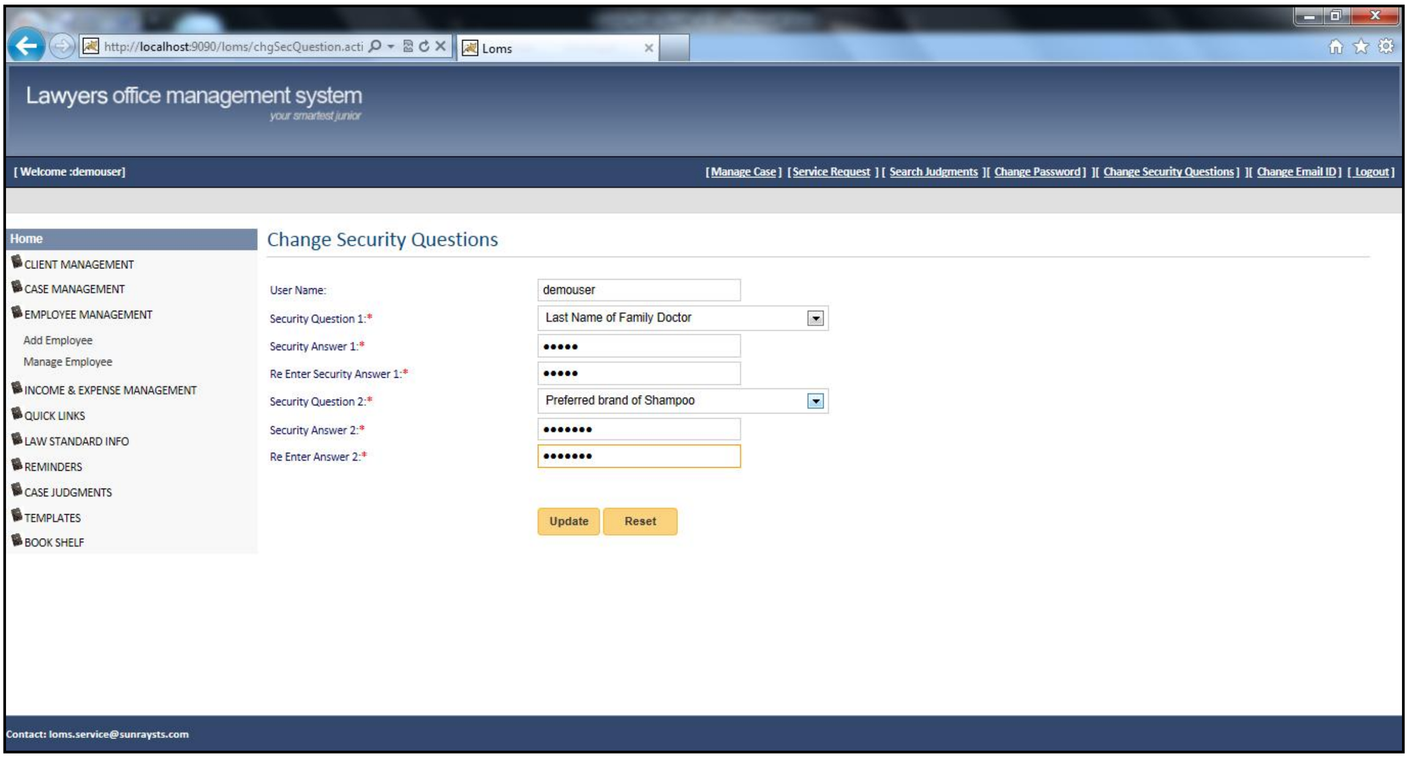
Note: New password and Confirm new password should not be less than 6 characters and should be same.

3.7 Change Security Questions

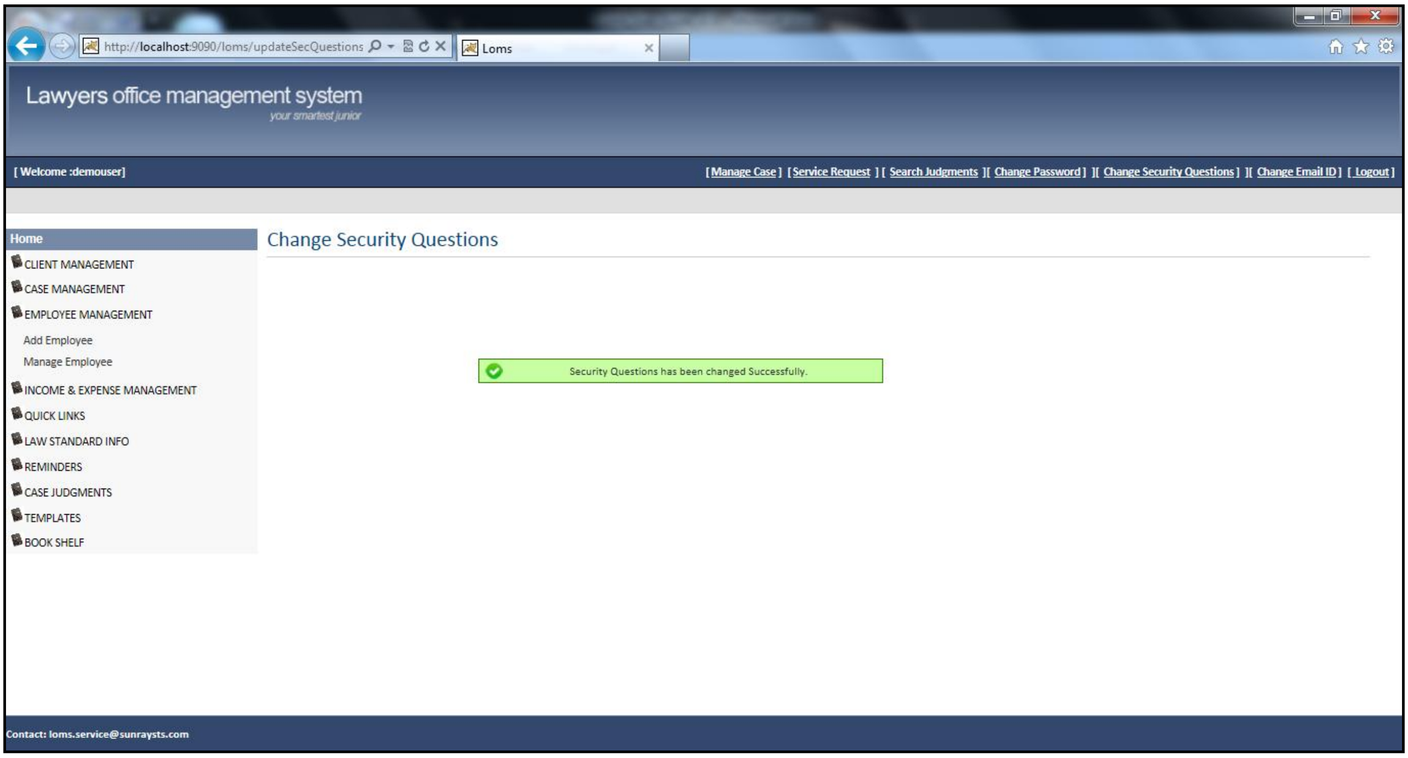
Step 1: Navigate to the link Change Security Questions. A page will be displayed as shown below,



Step 2: Change the Security questions (either Security Question 1 or Security Question 2 or both) and enter the answers for those questions as shown below,



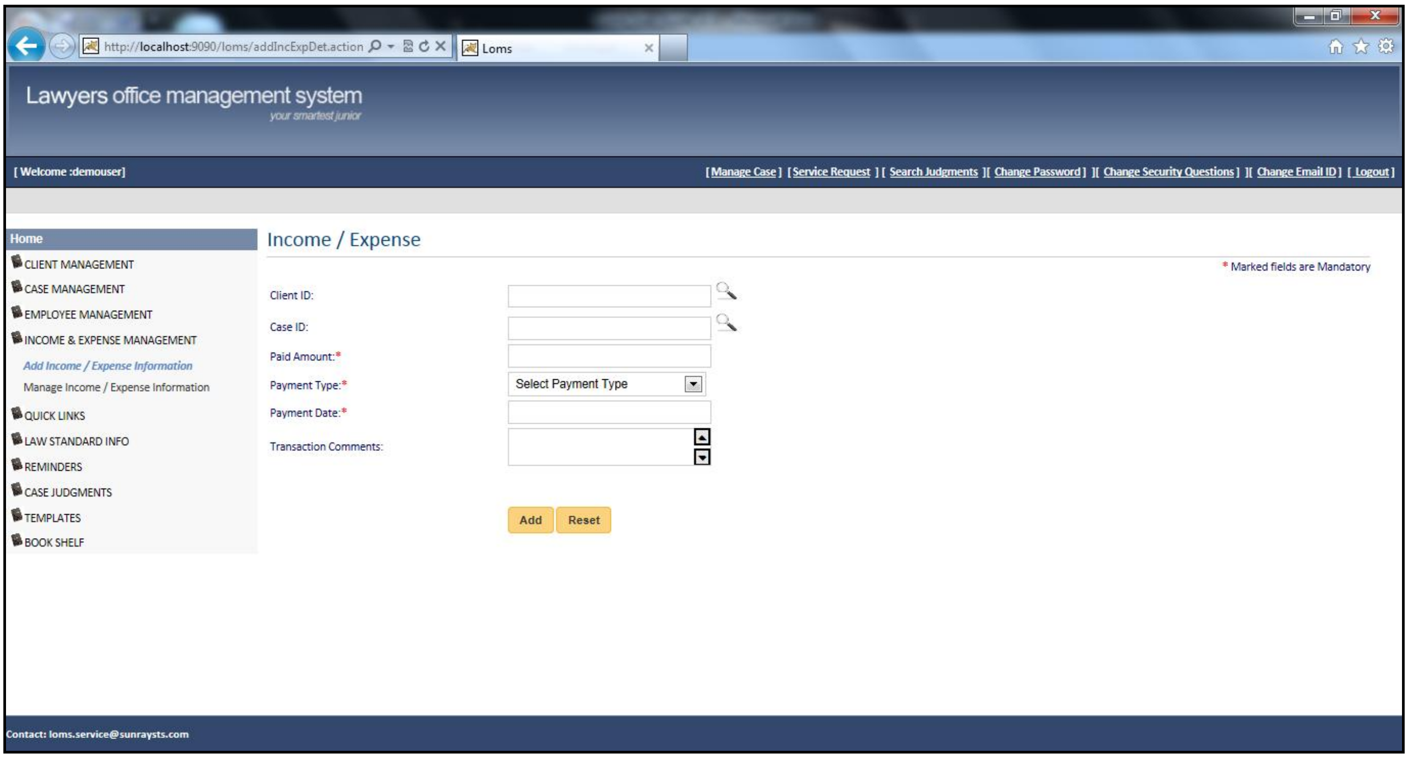
Step 3: Click on the UPDATE button after entering all the values in the mandatory text boxes. The application will change the Security questions and display the message as shown below,



4. Income & Expense Management

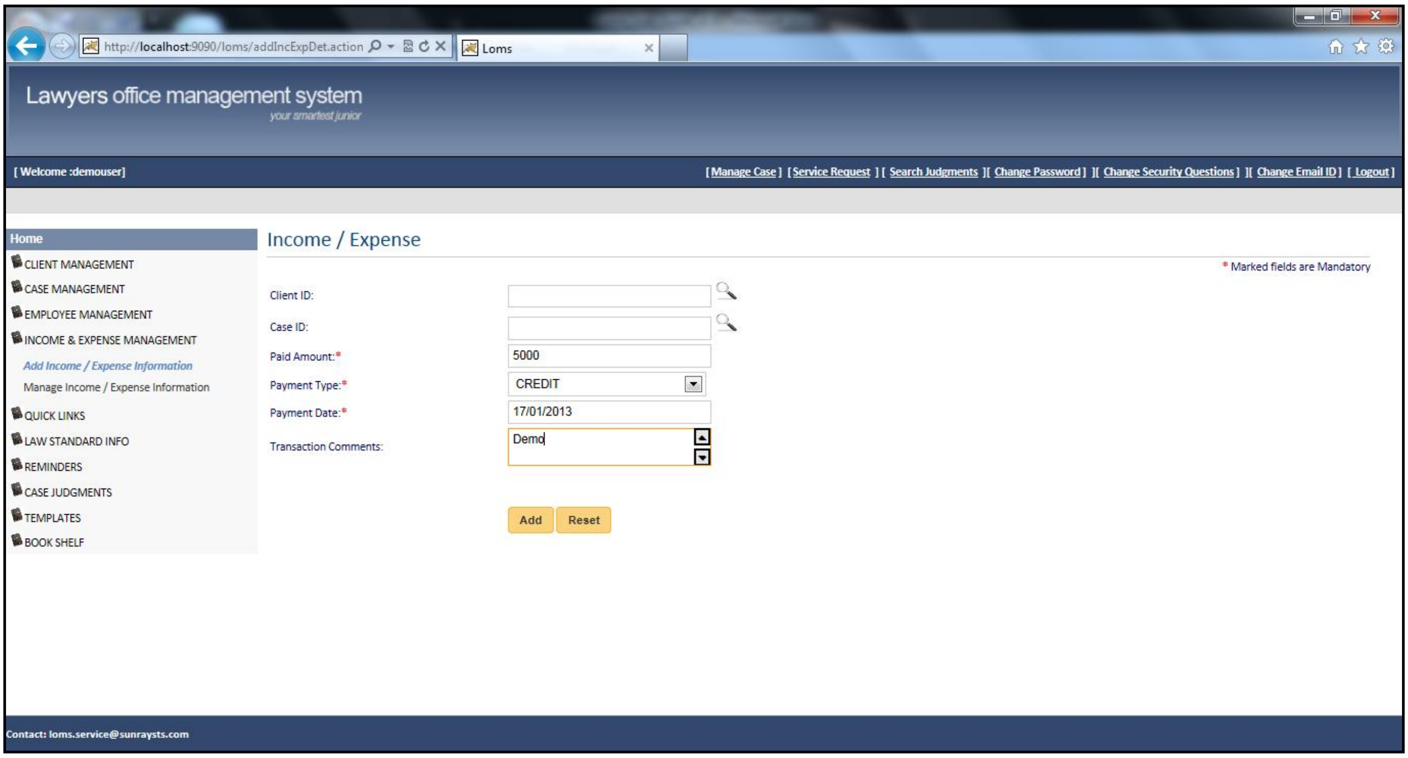
4.1. Add Income Expense Information

Step 1: Navigate to the link INCOME & EXPENSE MANAGEMENT > ADD INCOME / EXPENSE INFORMATION

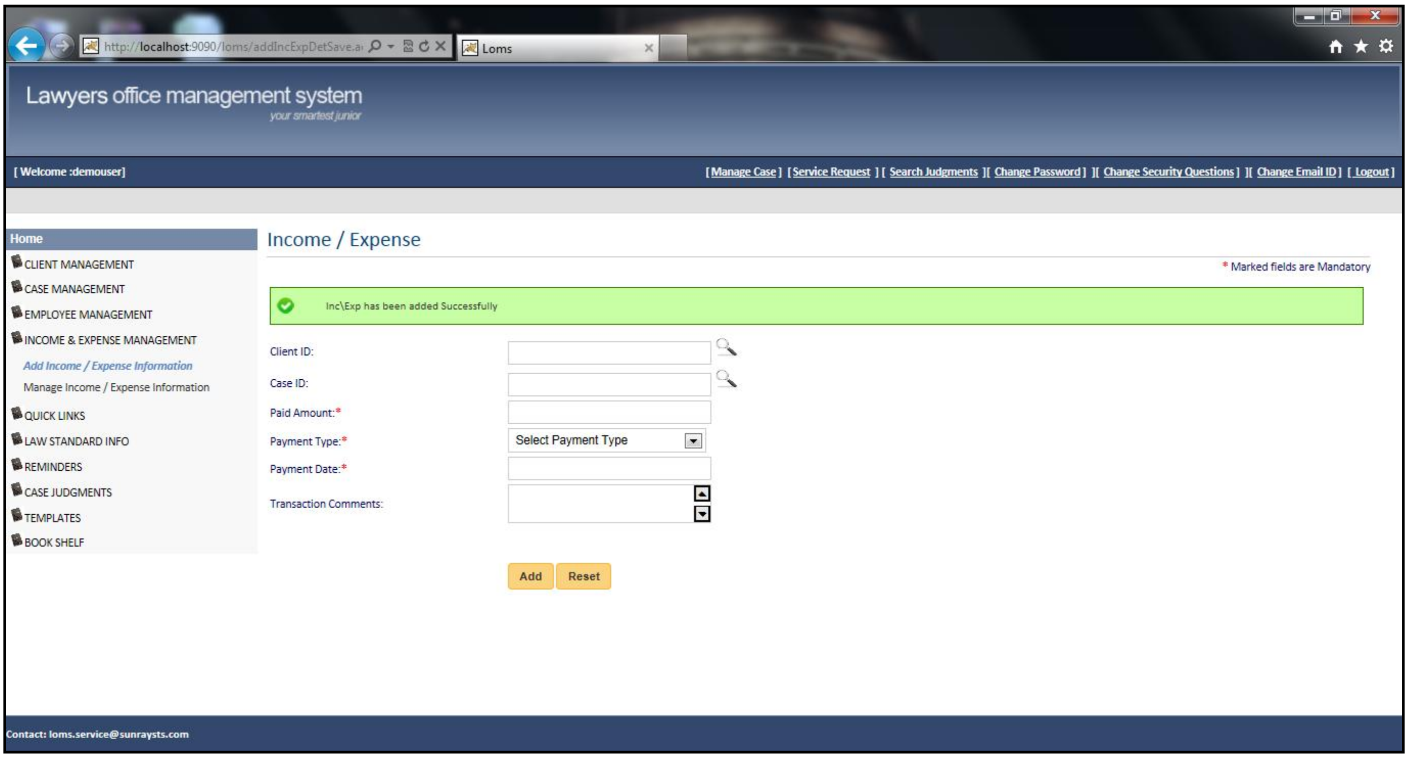


Step 2: Enter the value for the fields **Client ID, Case ID, Paid Amount, Payment Type, Payment Date, Transaction comments** as shown below,

NOTE: The application will not allow the user to post the data to the database without the values for the fields **Paid Amount, Payment Type, Payment Date**

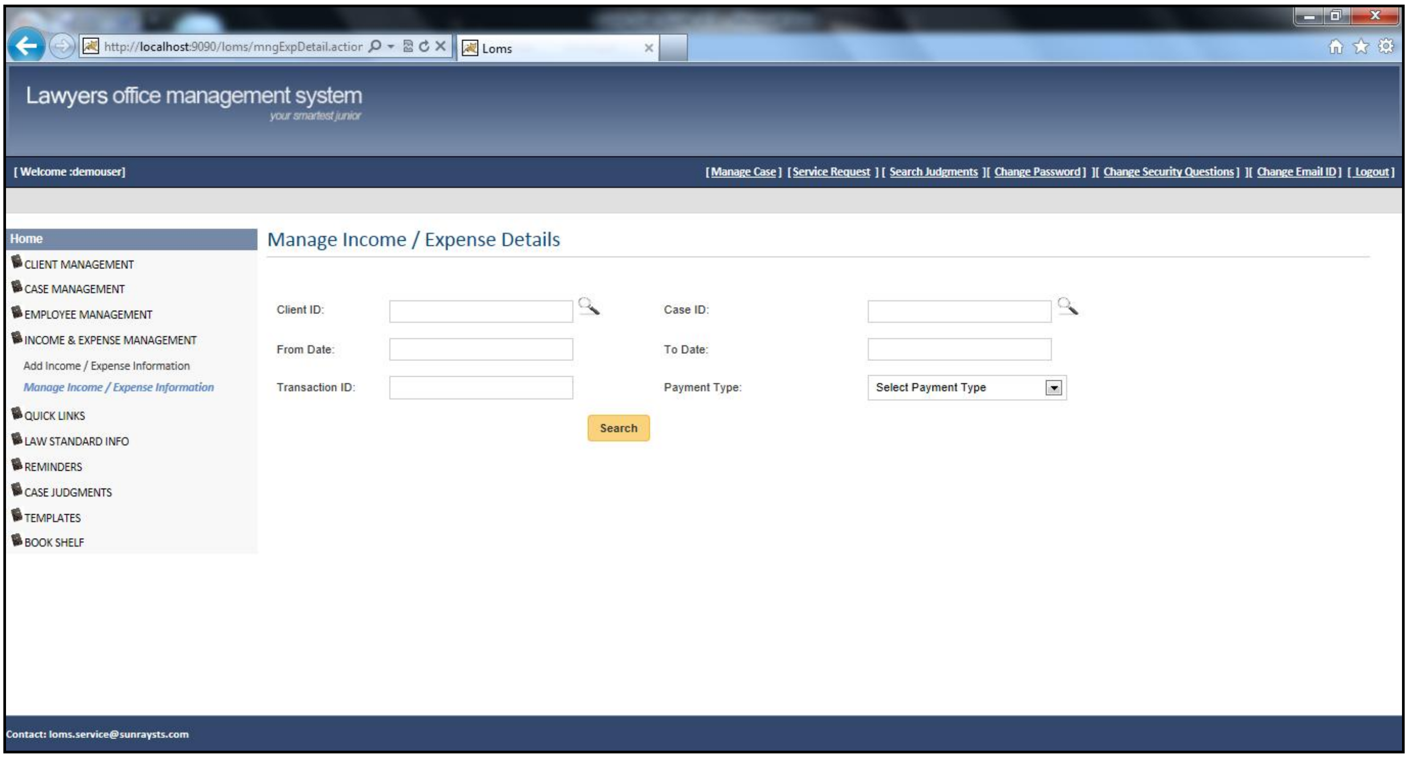


Step 3: Click on the ADD button after entering the values for the mandatory fields. Once the data is added to the database the application will display the message as shown below,



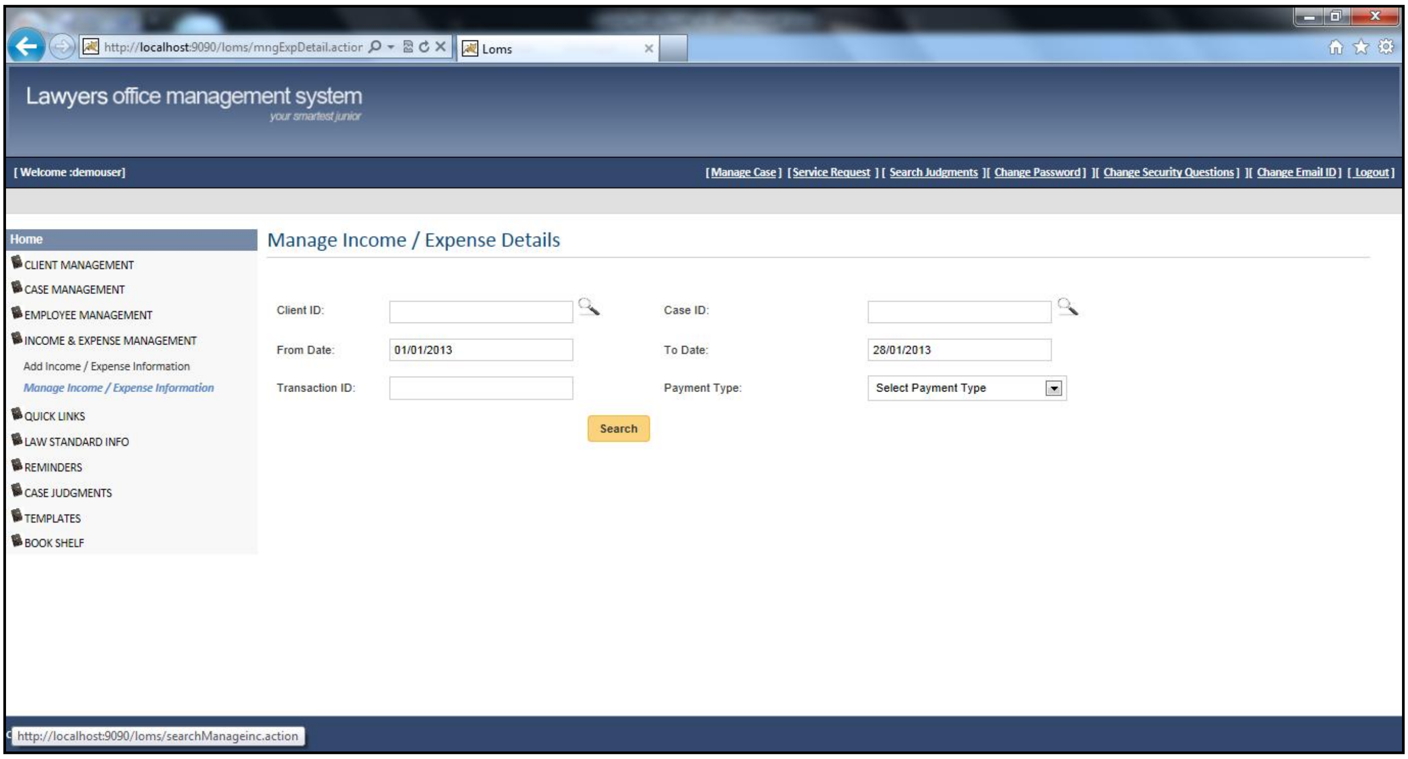
4.2. Search Income / Expense Information

Step 1: Navigate to the link INCOME & EXPENSE MANAGEMENT > MANAGE INCOME / EXPENSE INFORMATION

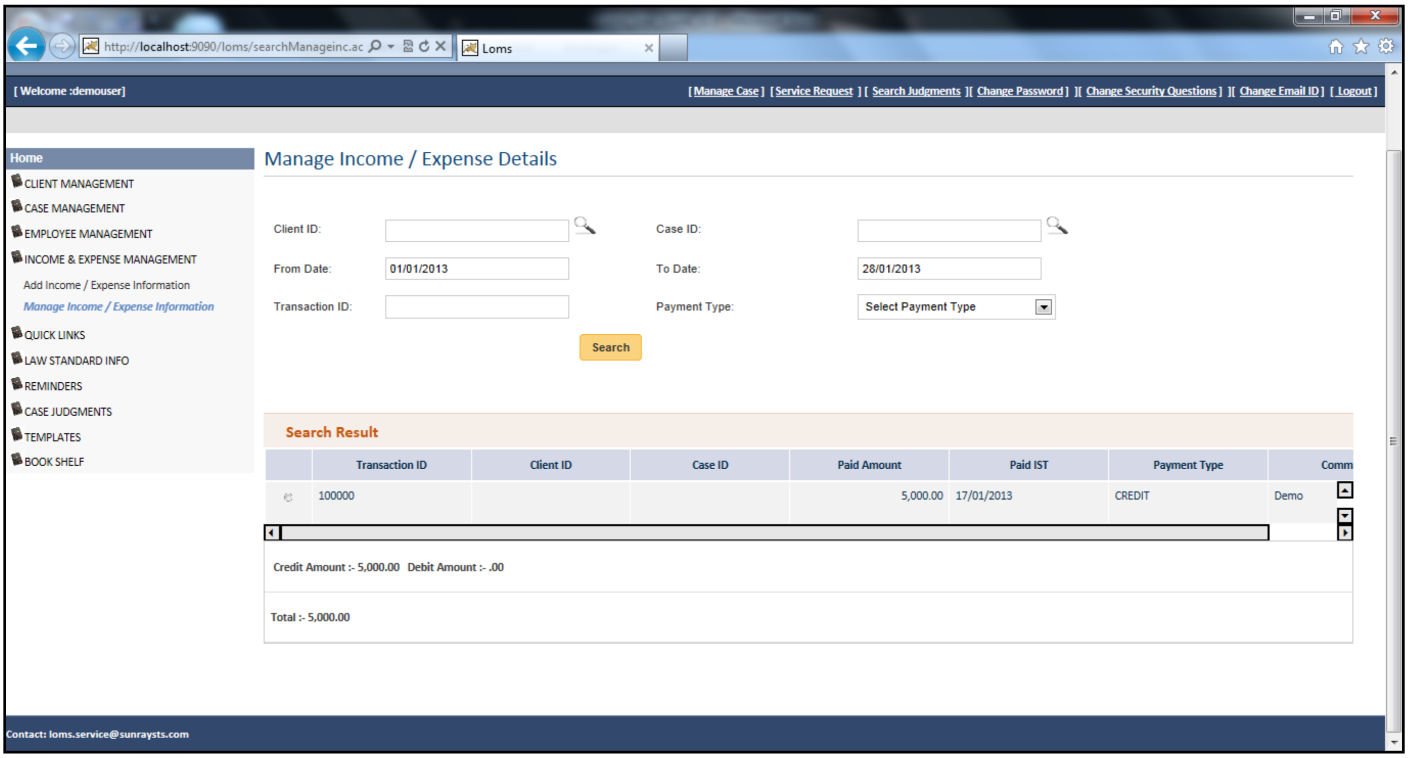


Step 2: Enter the value for any of the search criteria in the text box as shown below,

NOTE: The user can enter value for any one of the fields like Client ID, Case ID, From Date – To Date, Transaction ID and Payment Type

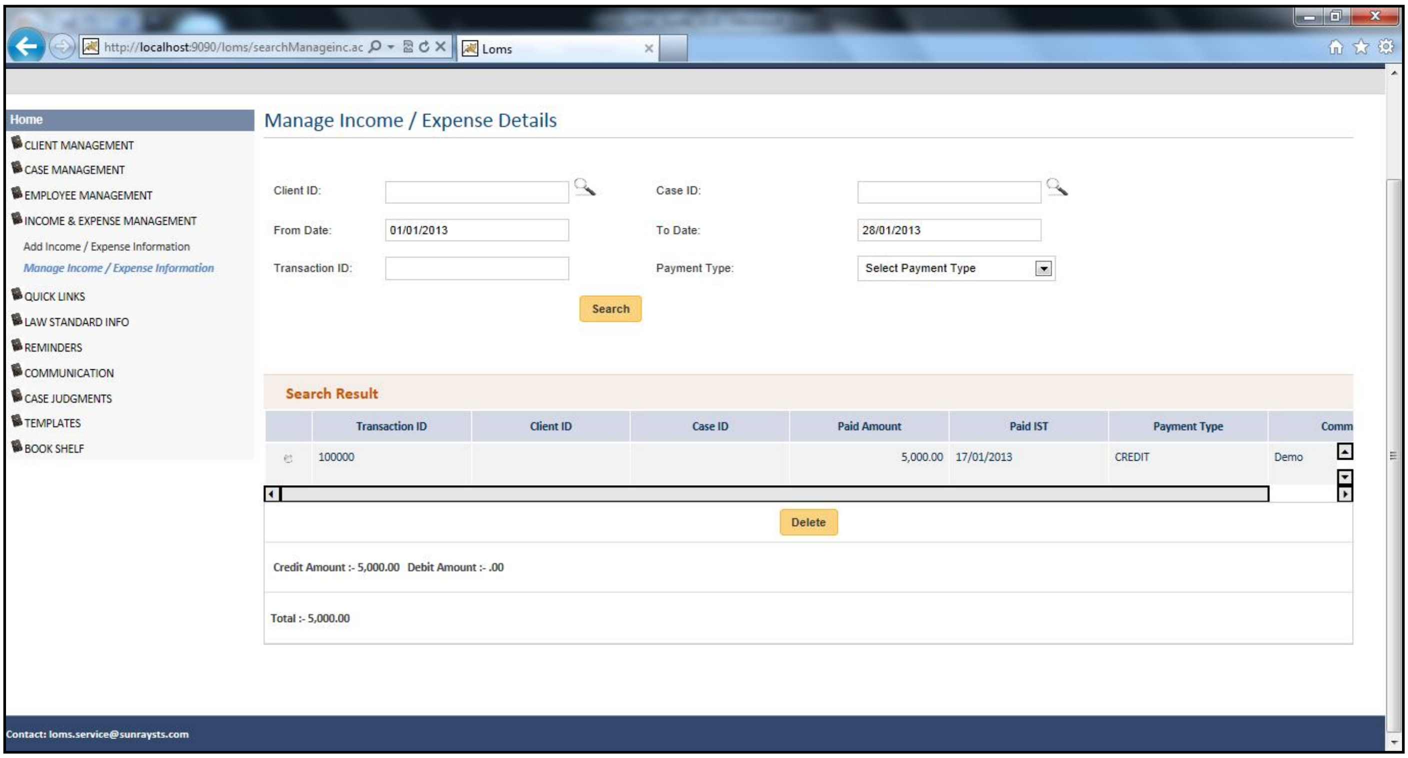


Step 3: Click on the SEARCH button after entering the search criteria. The application will list all the Income Expense information matching those criteria as shown below,

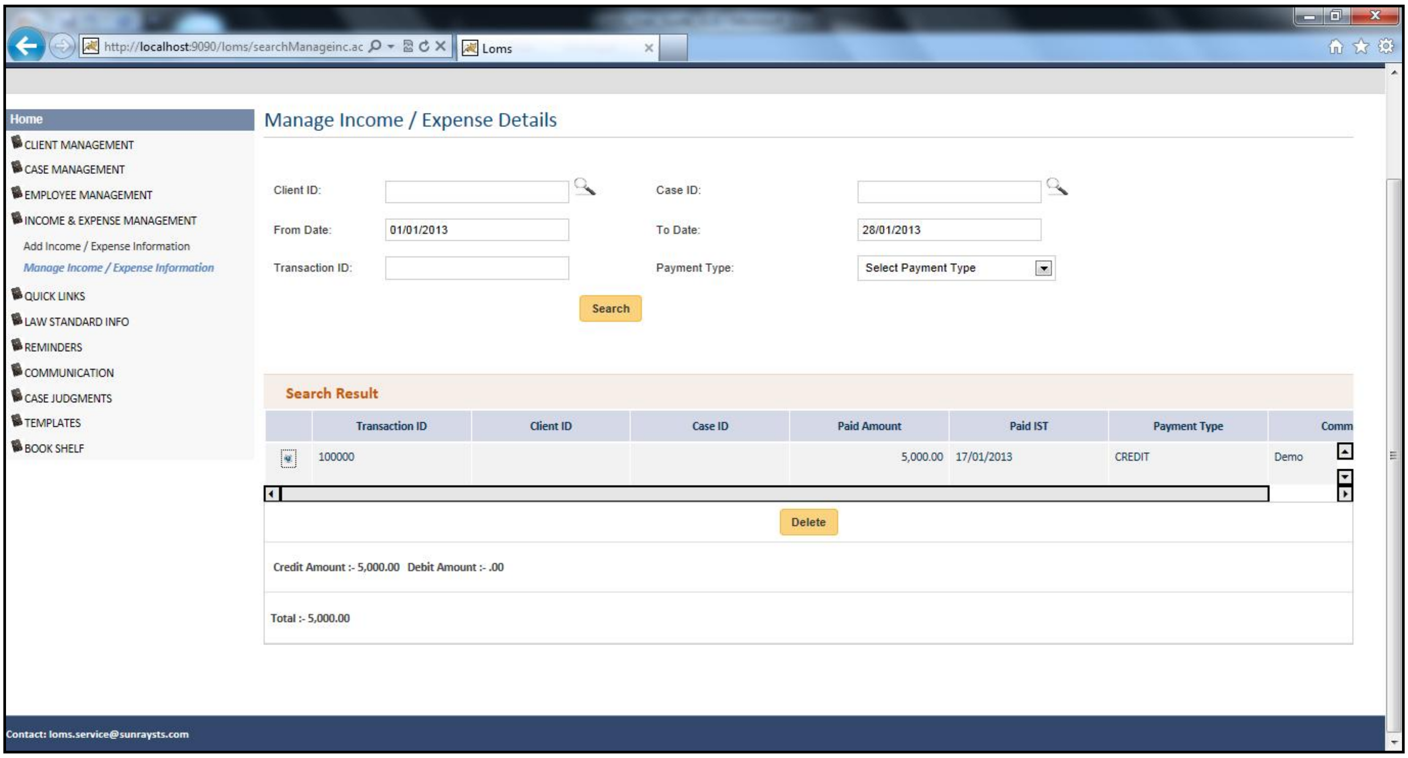


4.3. Delete Income / Expense Information

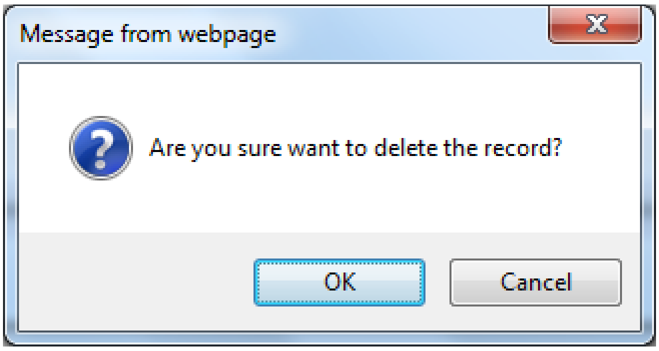
Step 1: Search for the INCOME / EXPENSE information as explained in the Search Income / Expense Information section above,



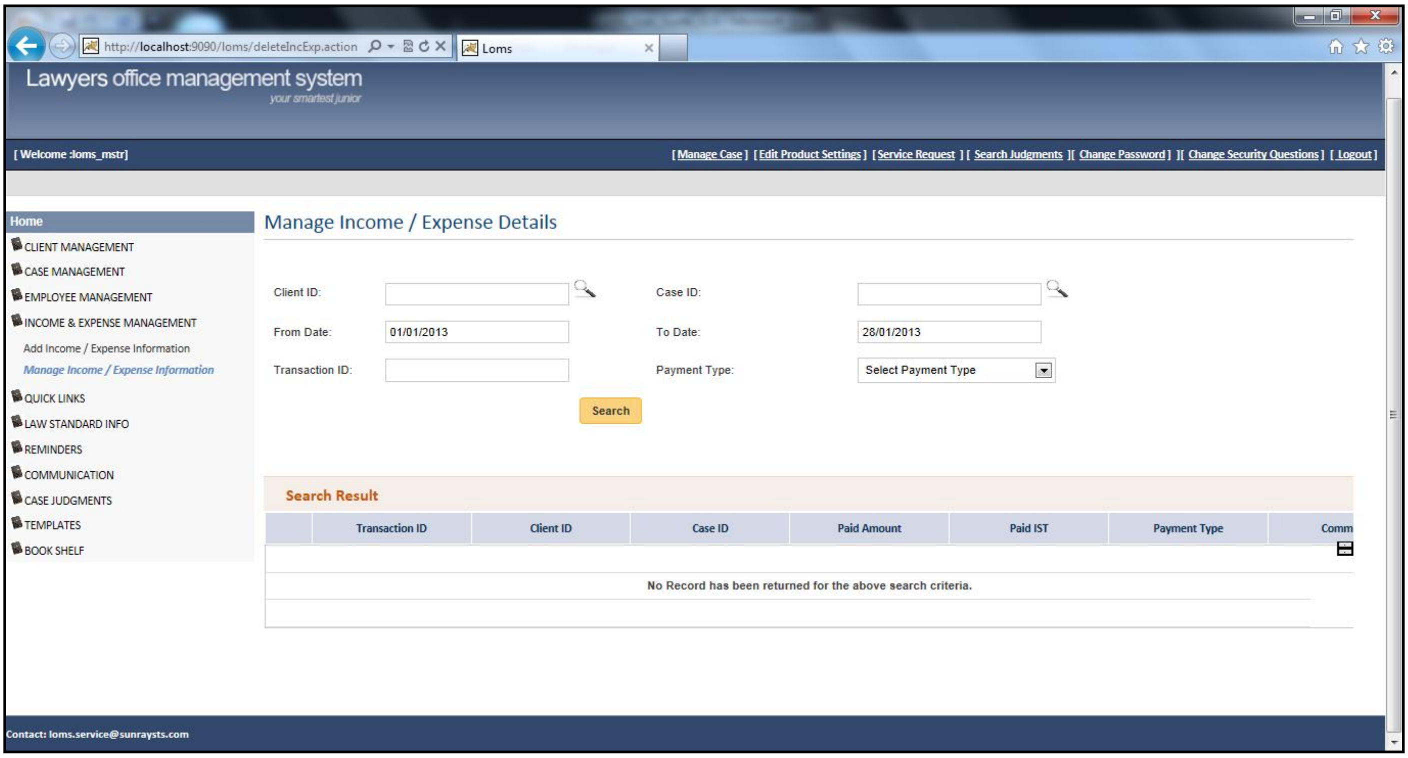
Step 2: Select the Income / Expense transaction you wish to delete and click on the DELETE button as shown below



Step 3: When the user clicks on the DELETE button, the application will prompt the user with the message “Are you sure you want to delete the record?” as shown below,



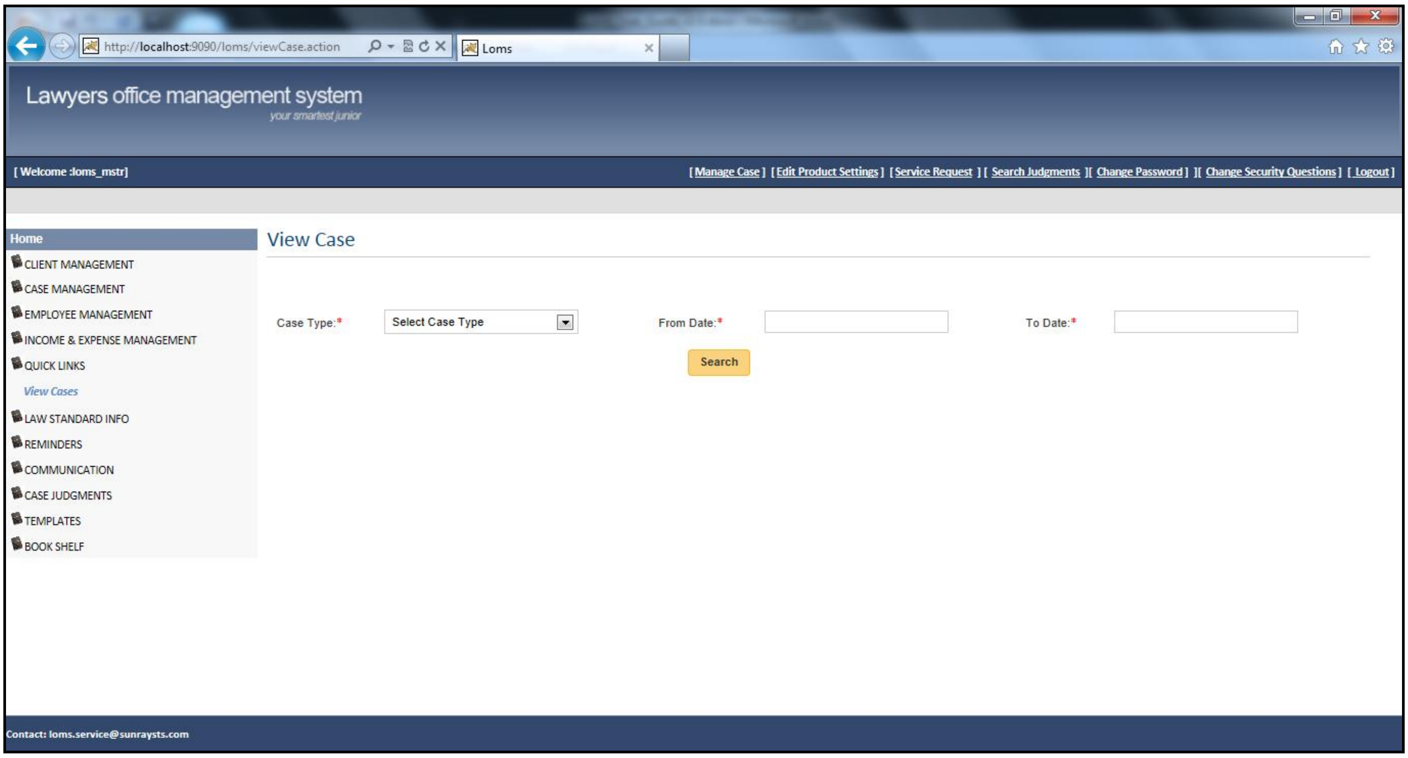
Step 4: Click on OK button if you wish to delete, else click on CANCEL. When the user clicks on OK button, the application will delete the record and the page will be displayed as shown below,



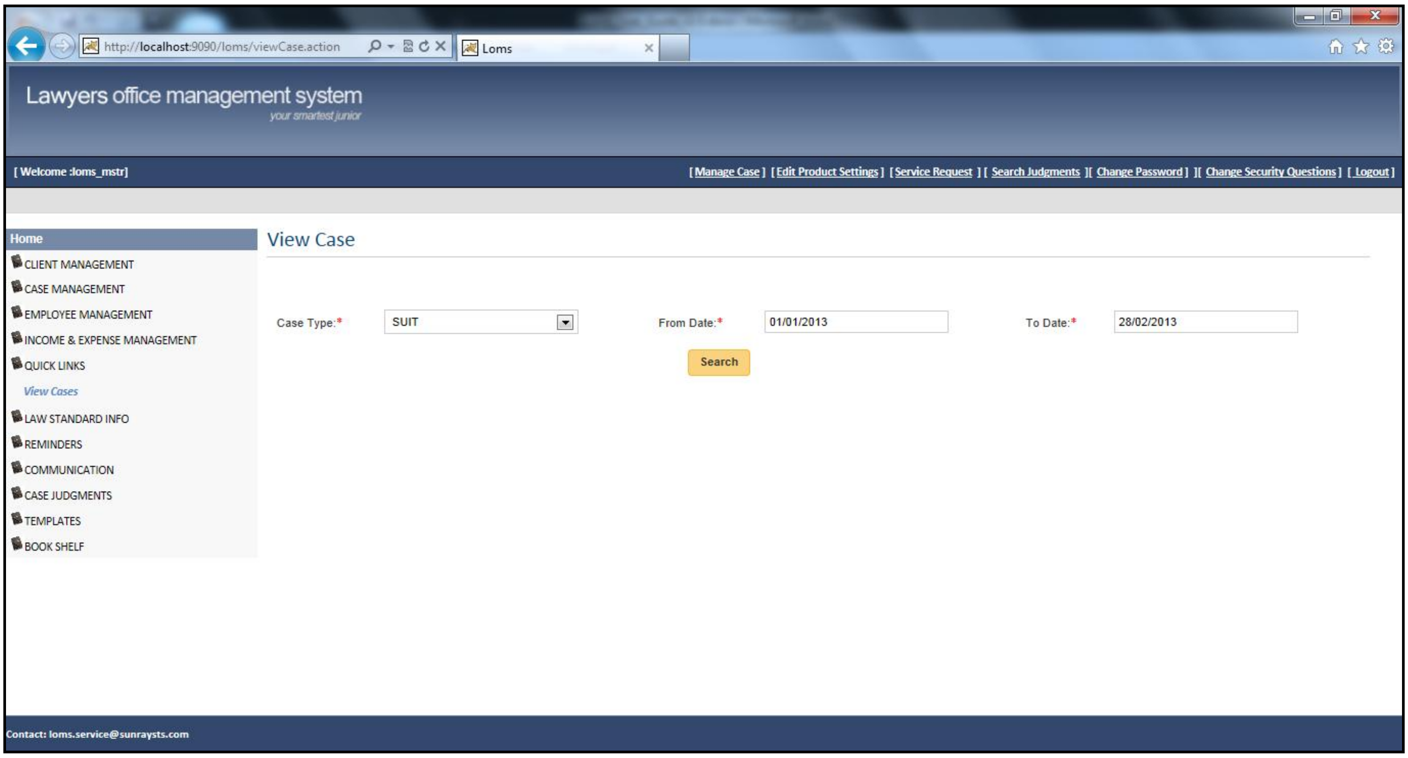
5. QUICK LINKS

5.1. View Case Information

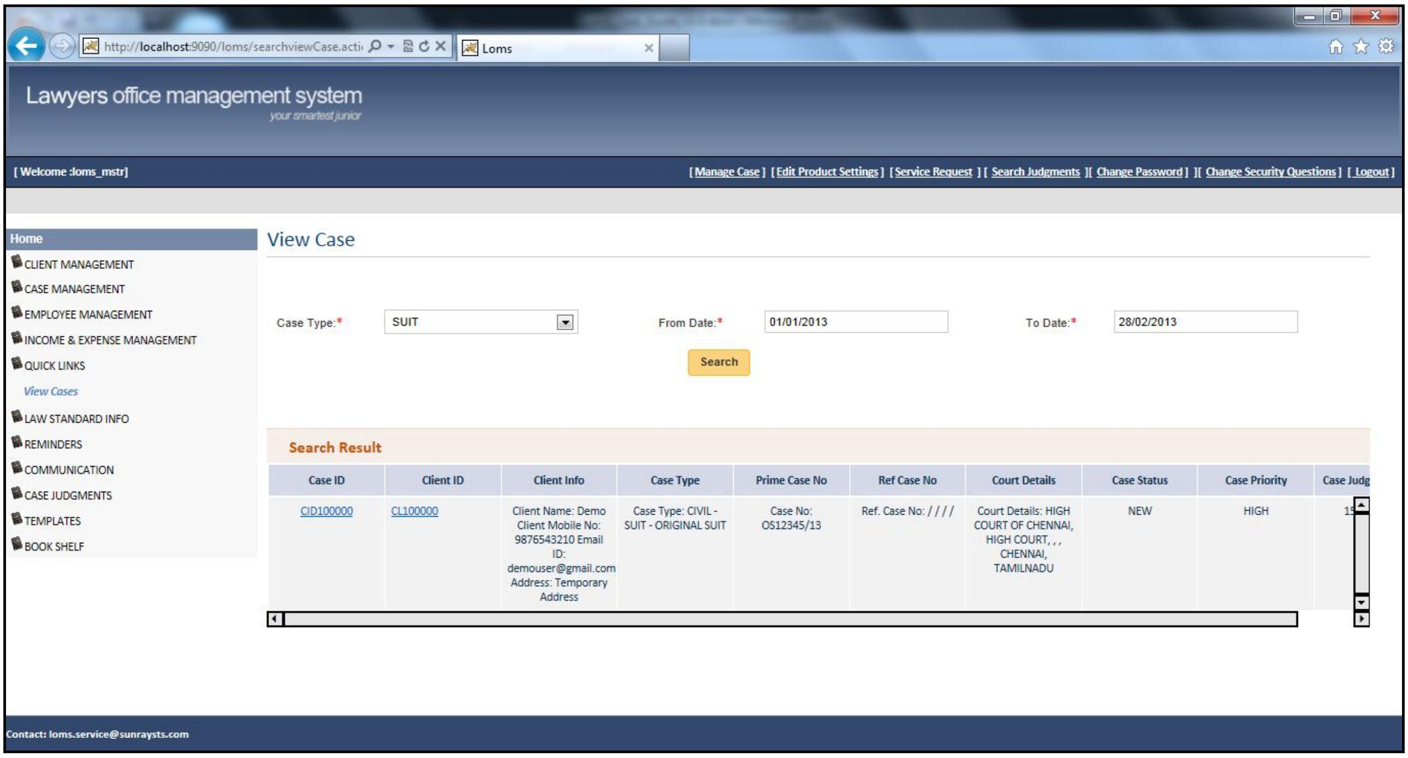
Step 1: Navigate to the link QUICK LINS > View Cases



Step 2: Select the Case Type and enter the value for From Date and To Date (Date Range) as shown below,



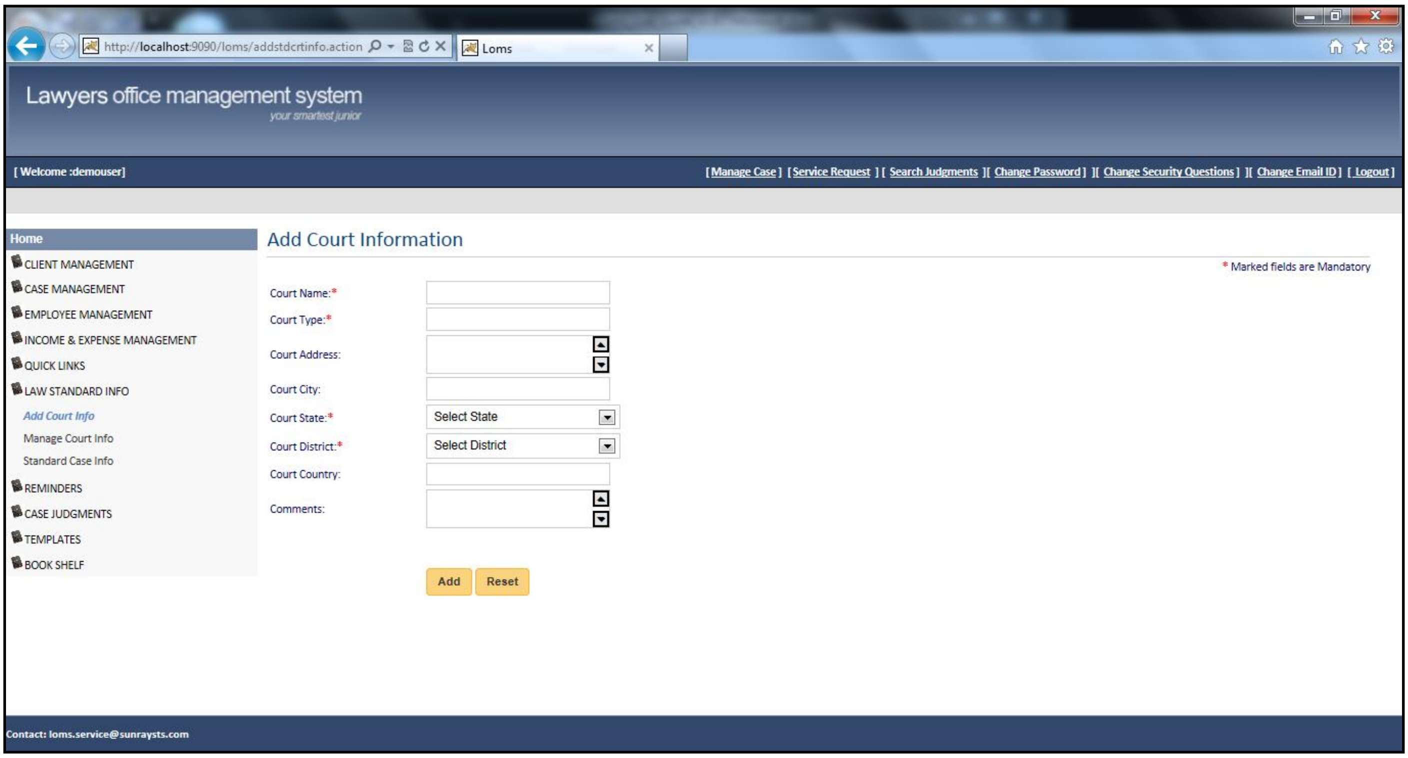
Step 3: Click on SEARCH button after entering the value for the Search Criteria. The application will list all the cases of that particular type in the date range as shown below,



6. LAW STANDARD INFORMATION

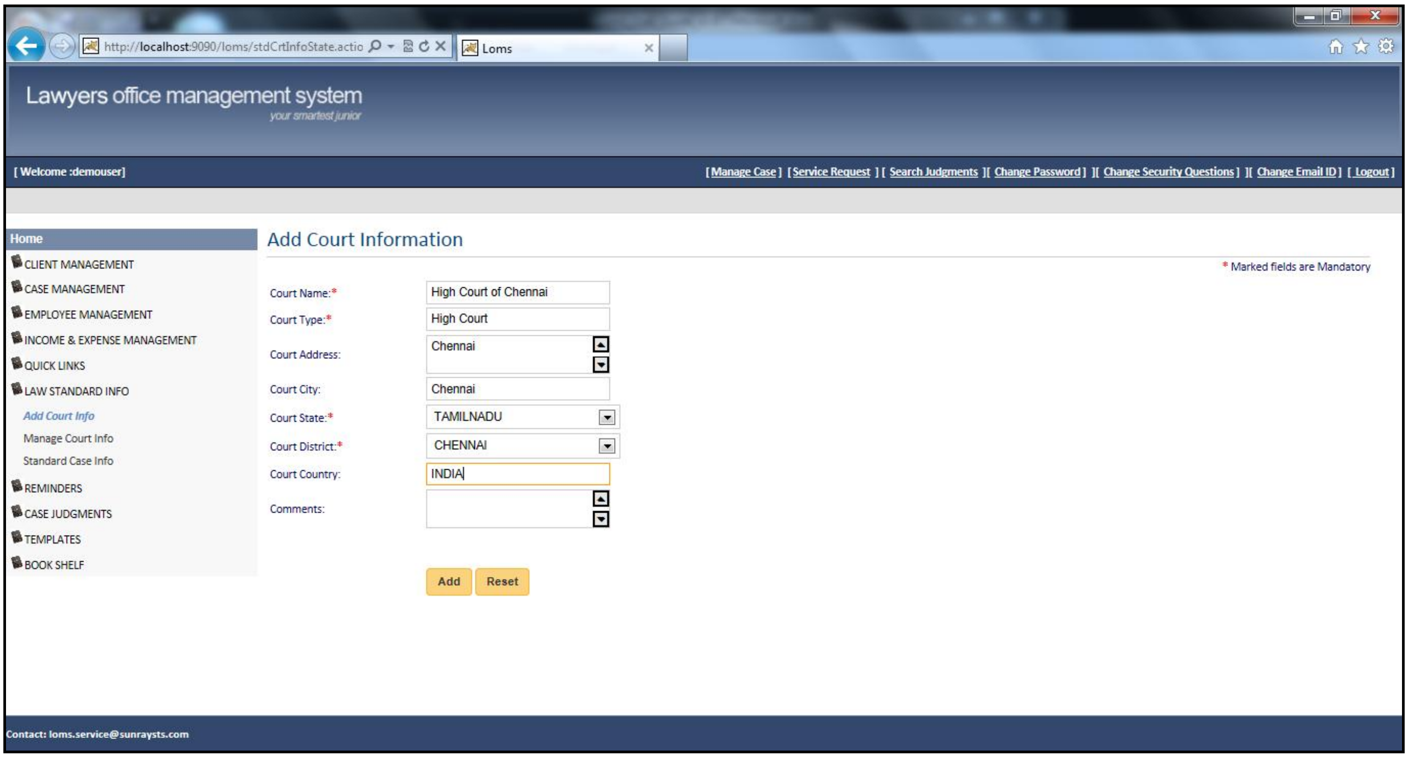
6.1. Add Court Information

Step 1: Navigate to the link LAW STANDARD INFO > Add Court Info

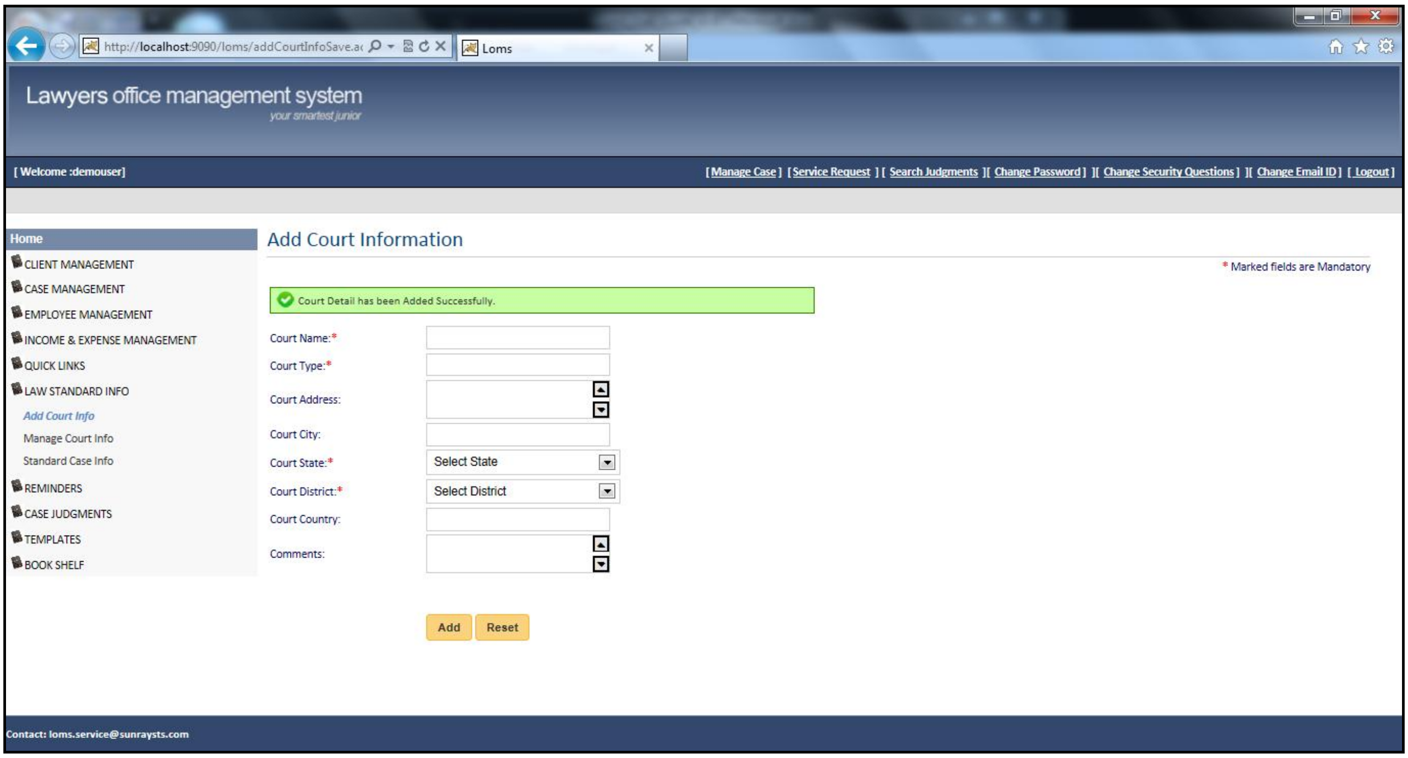


Step 2: Enter the details of the Court as shown in the image below,

NOTE: The application will not allow the user to add the court without the value for the fields **Court Name, Court Type, Court State and Court District**

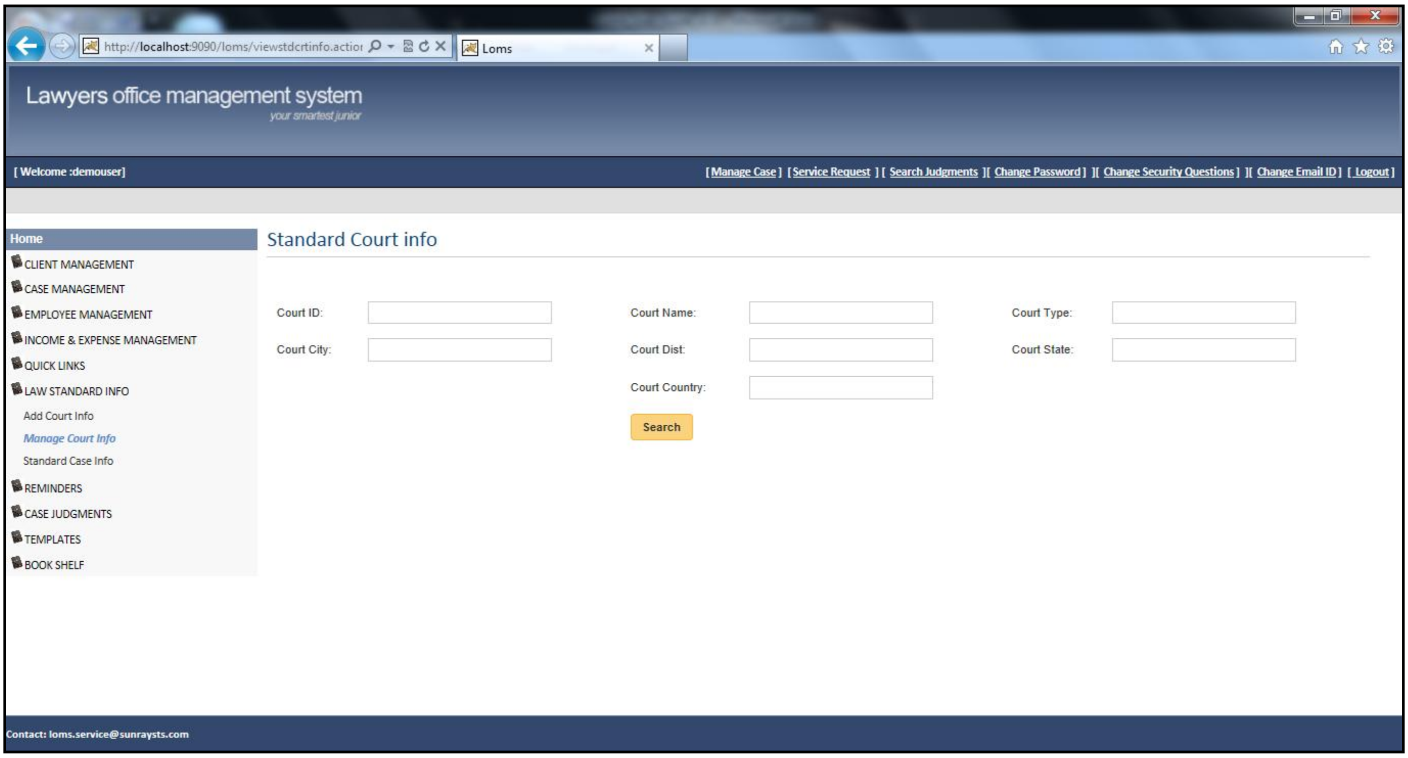


Step 3: After entering the value for the Court Details in the respective text boxes, click on ADD button. The application will give the message "Court Detail has been Added Successfully" as shown below,

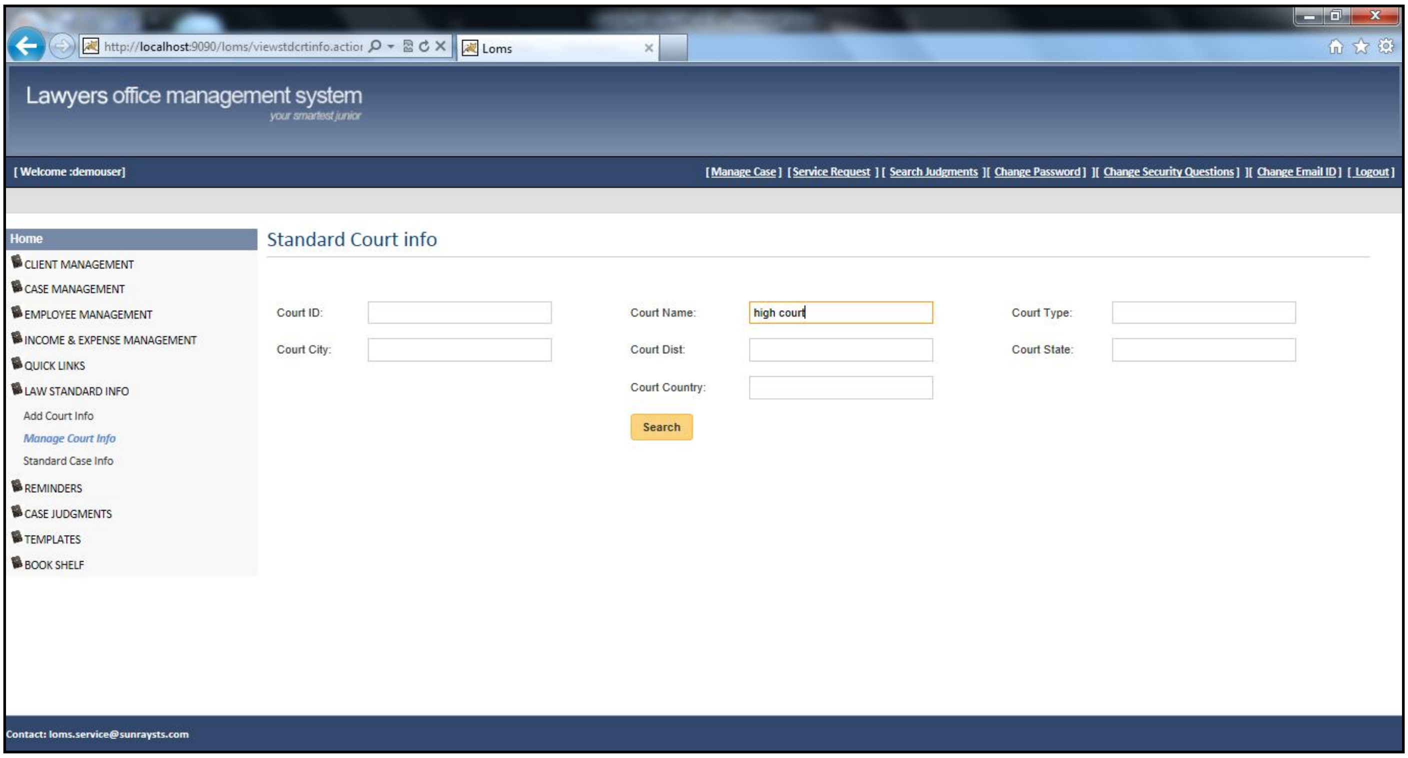


6.2. Search Court Information

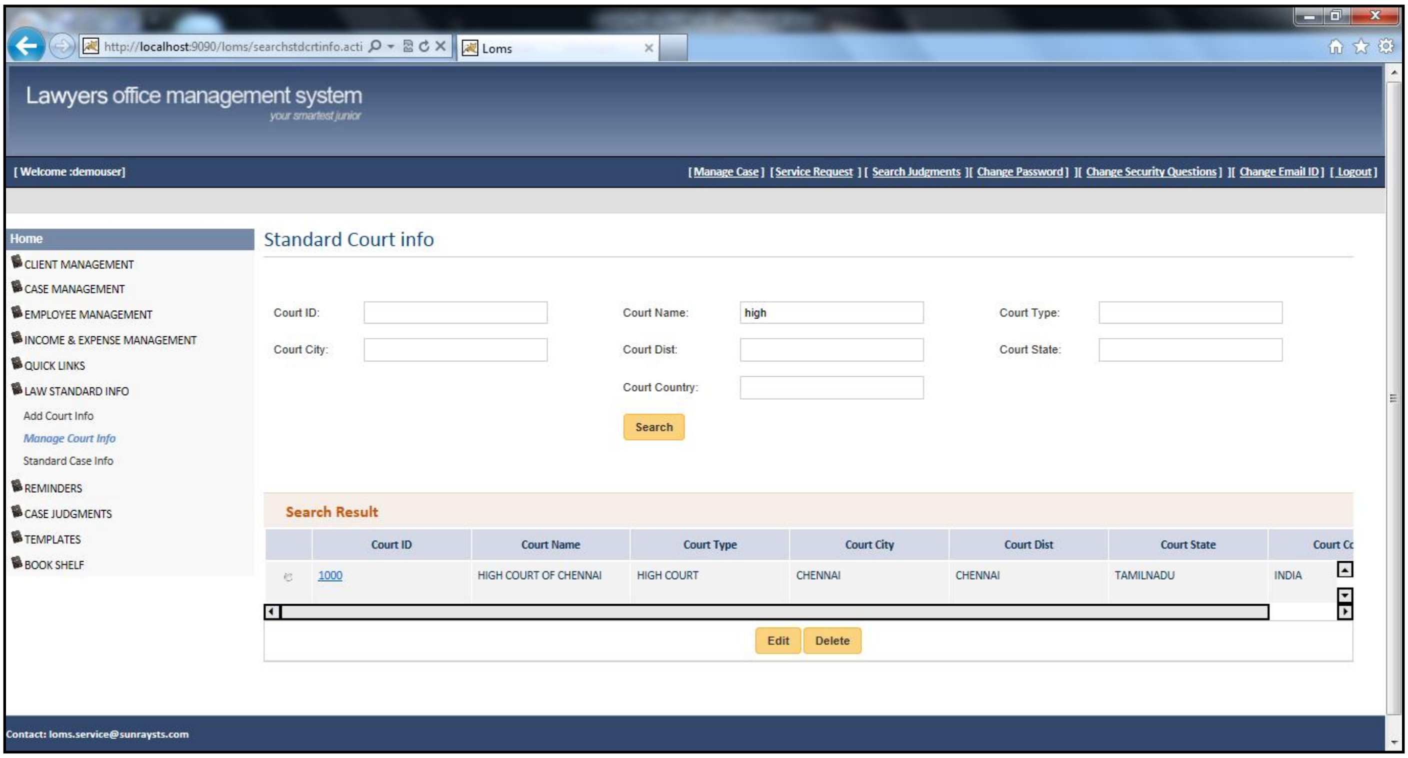
Step 1: Navigate to the link LAW STANDARD INFO > MANAGE COURT INFO



Step 2: Enter the value for any one of the search criteria in the text boxes as shown below,

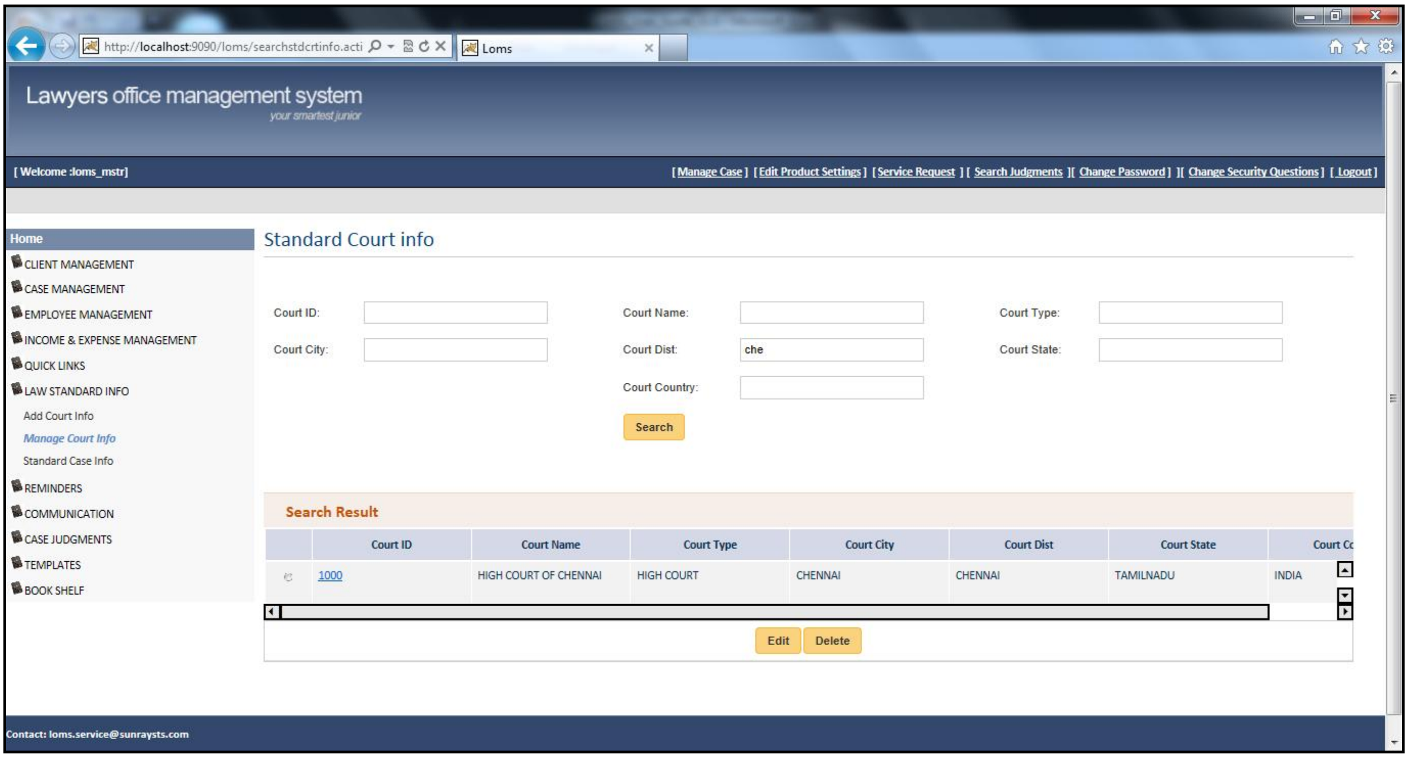


Step 3: Click on the SEARCH button after entering the value for the Search Criteria. The application will list all the Courts matching the search criteria as shown below,

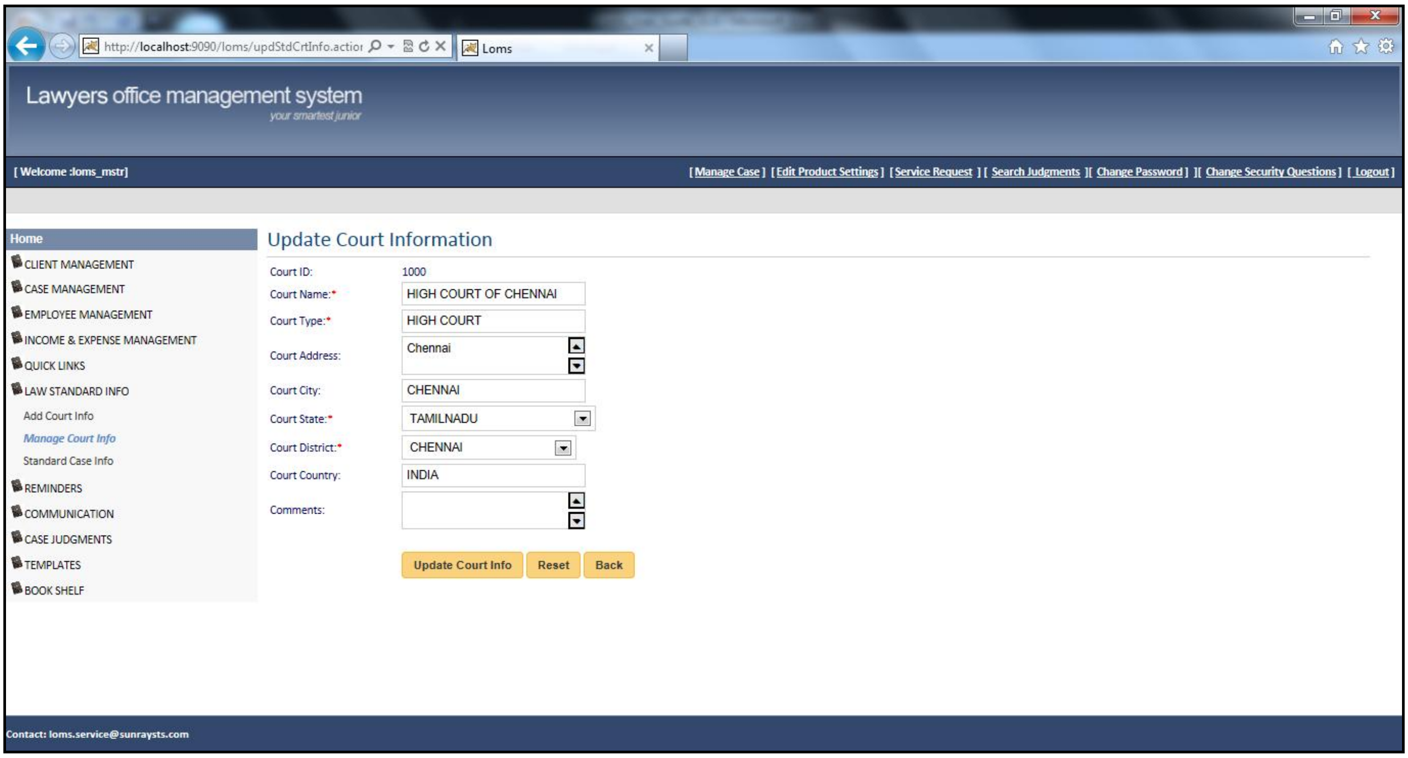


6.3. Modify Court Information

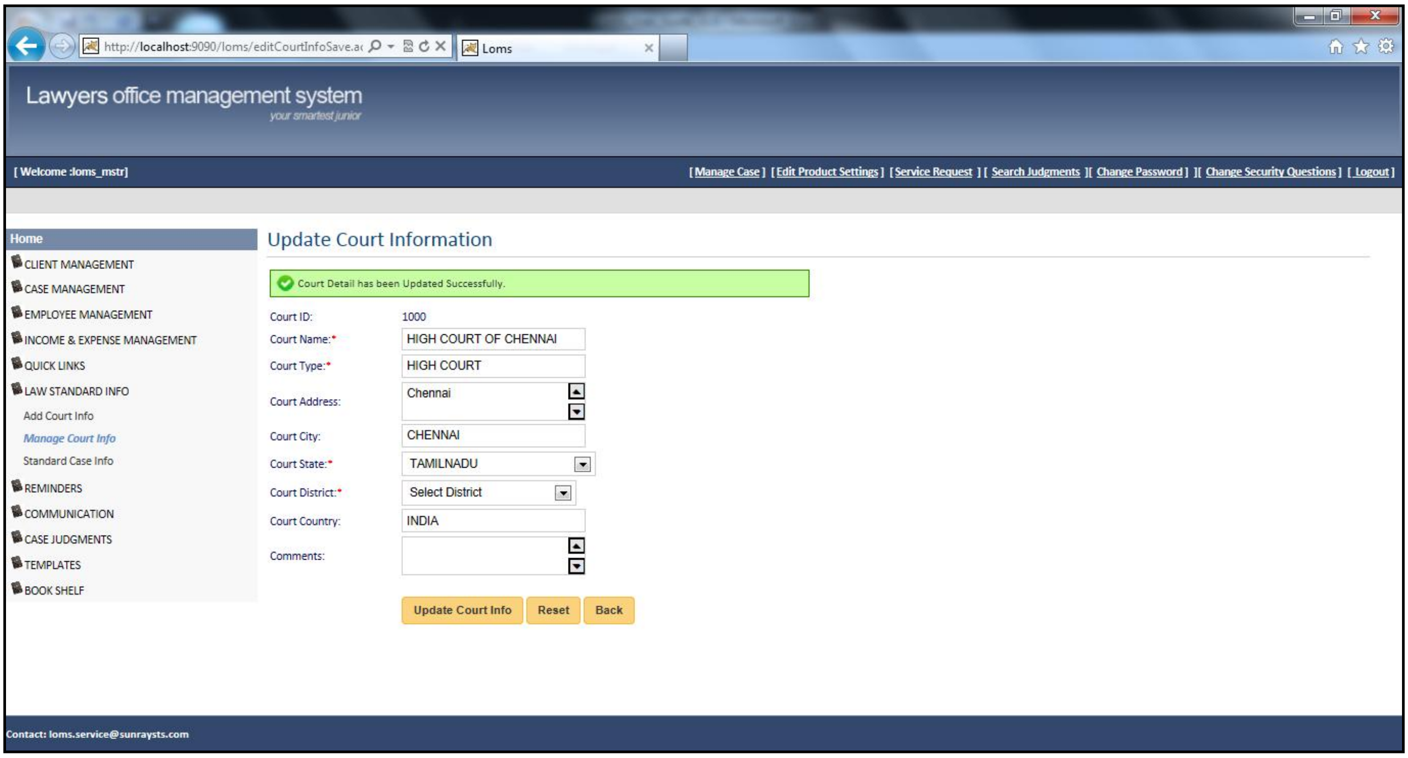
Step 1: Search for the Court information as explained in the "Search Court Information" section as mentioned above



Step 2: Select the Court you wish to modify and click on edit button as shown below,

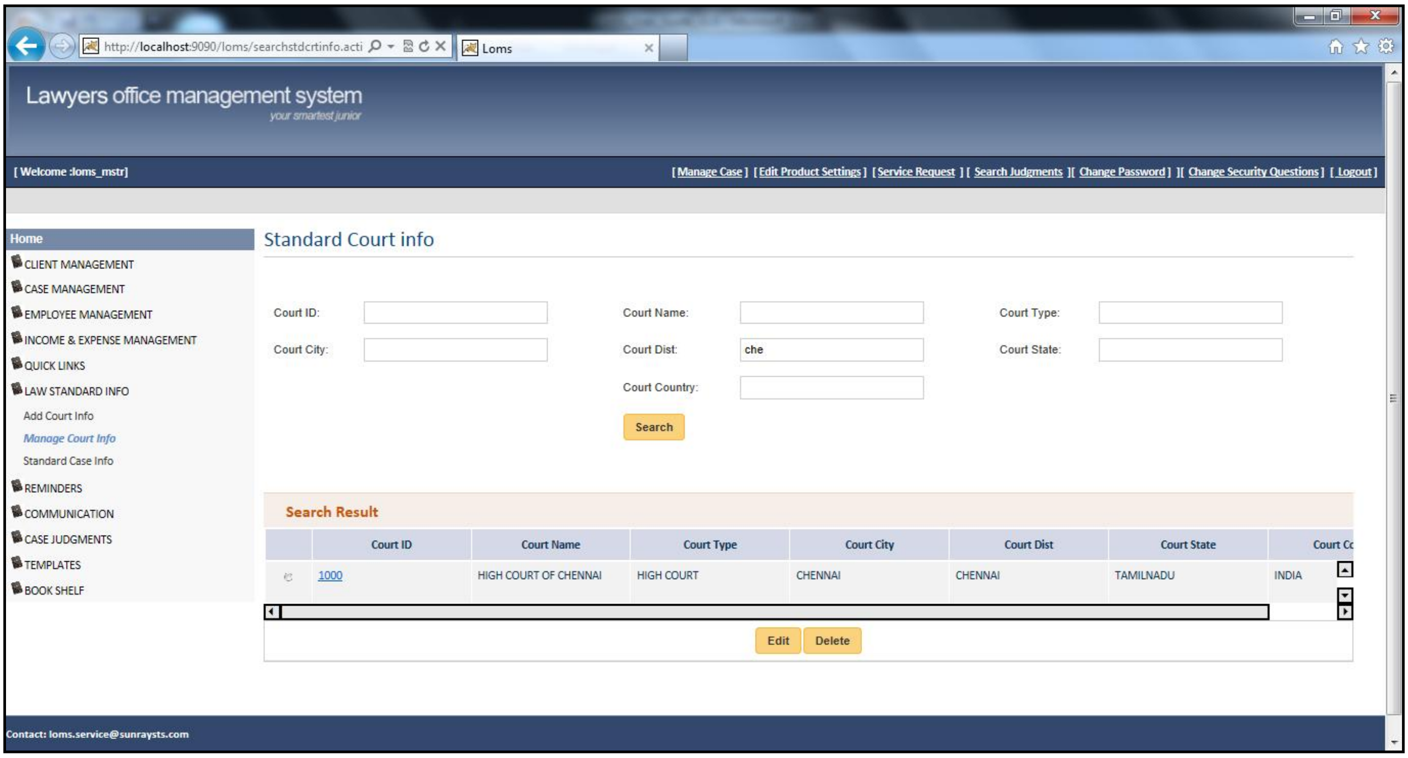


Step 3: Modify the court details and click on the UPDATE COURT INFO button. Once the data is updated to the database the application will show the message "*Court Detail has been Updated Successfully*" as shown below,

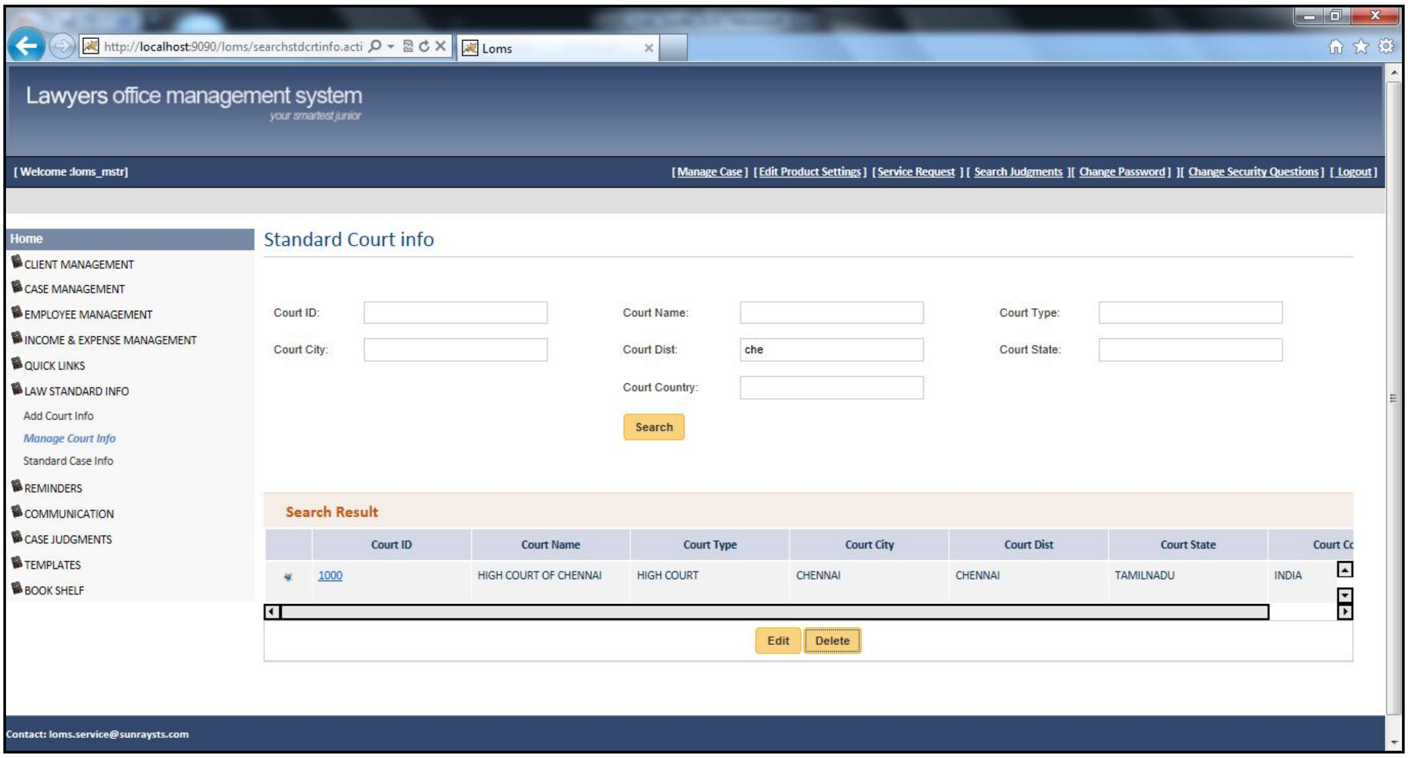


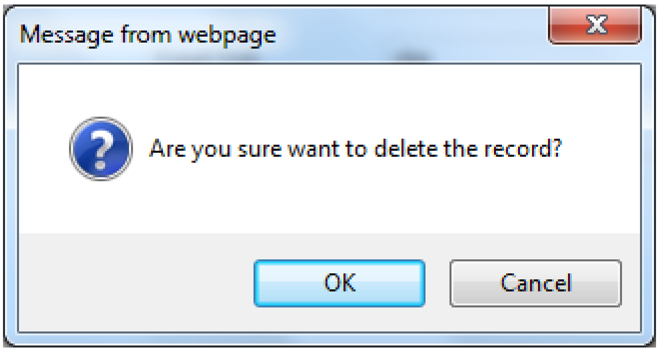
6.4. Delete Court Information

Step 1: Search for the Court information as explained in the “Search Court Information” section as mentioned above

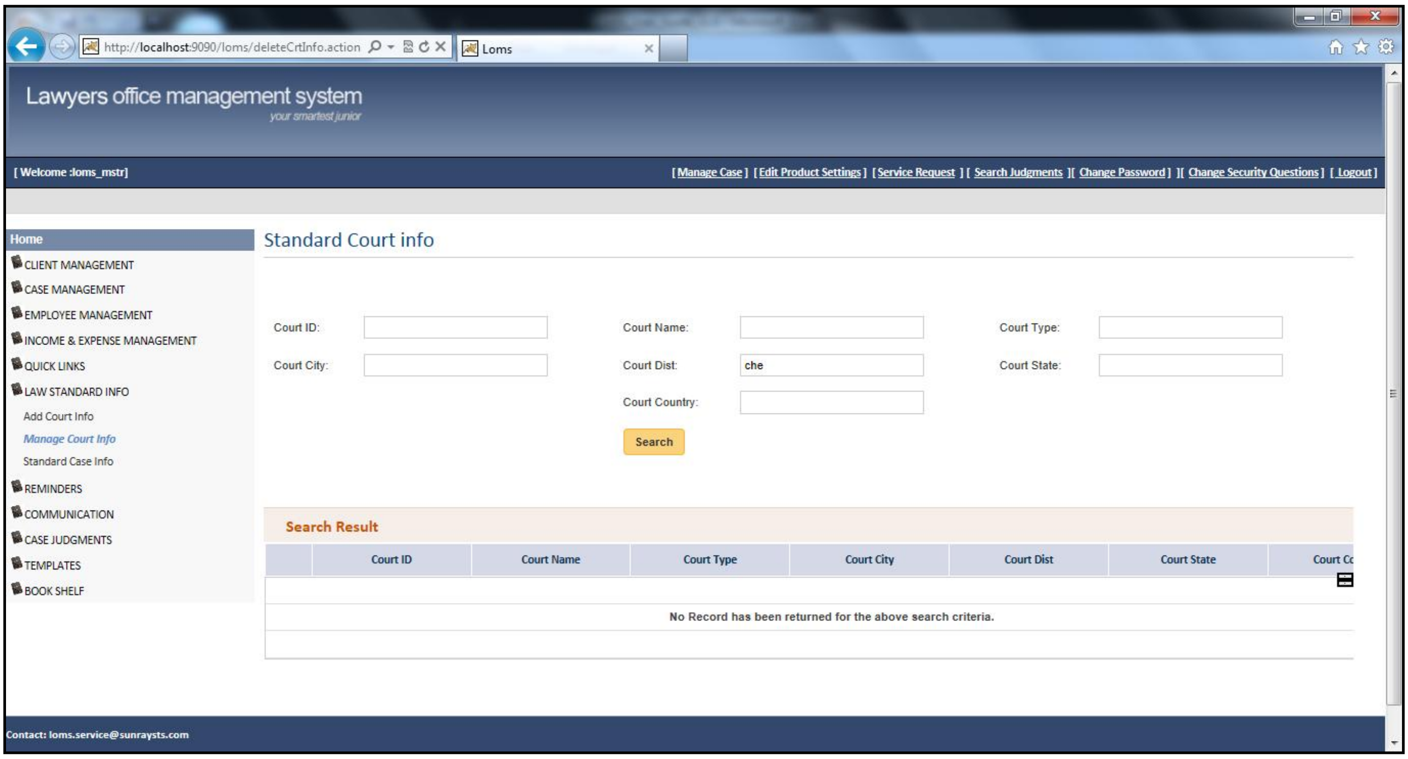


Step 2: Select the Court you wish to delete and click on DELETE button. The application will prompt the user with the message “Are you sure you want to delete the record?” Click on OK if you wish to delete the data, else click CANCEL.



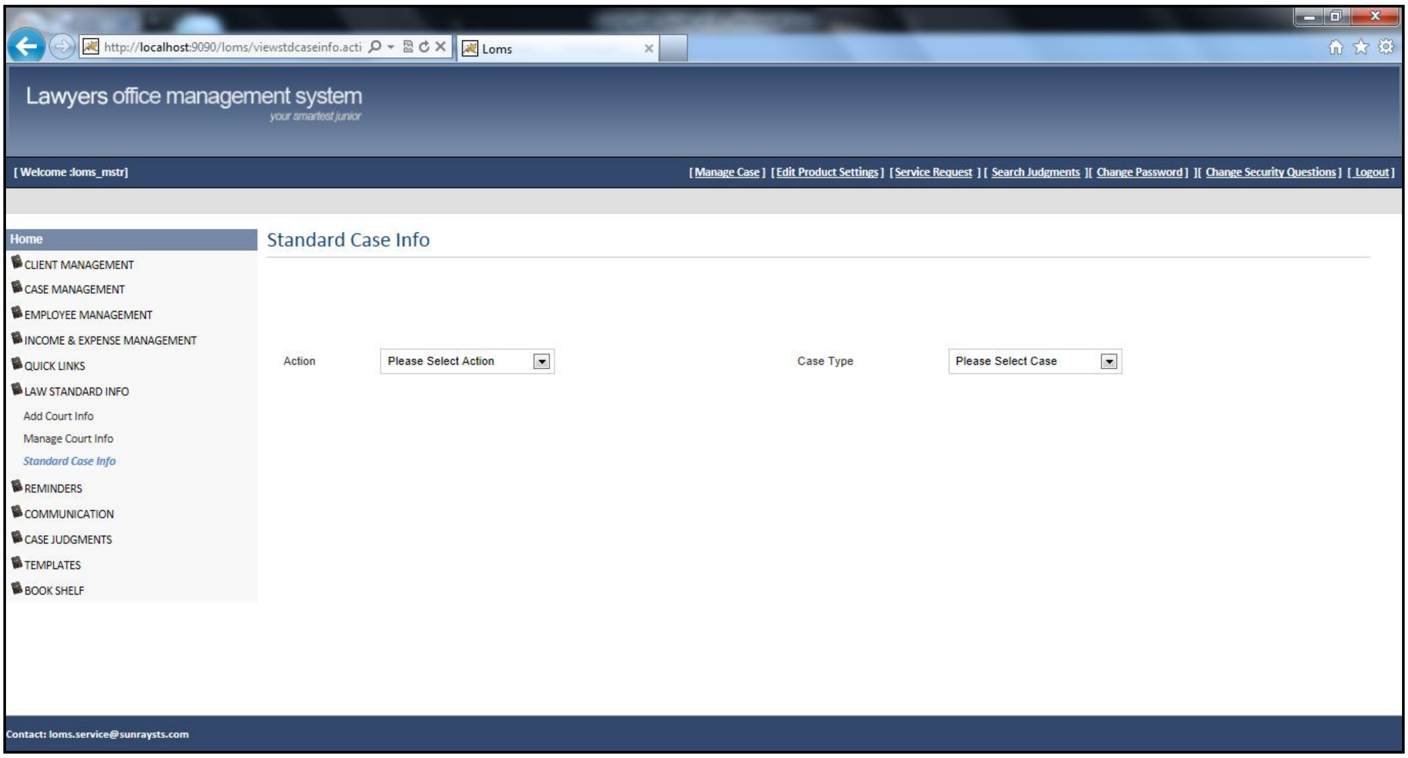


Step 3: On clicking OK the application will delete the court information from the table as shown below,

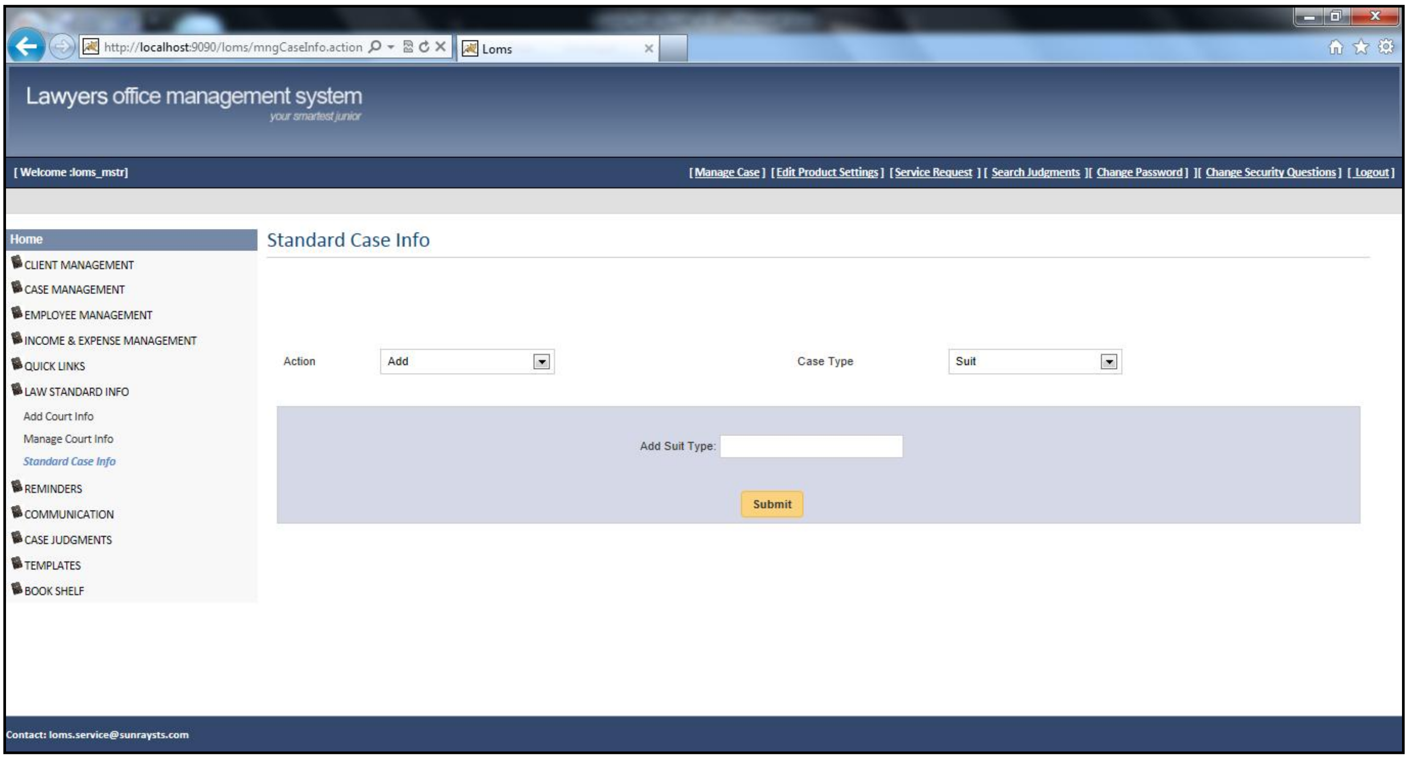


6.5. Add Case Type (Civil / Suit / Petition / Criminal)

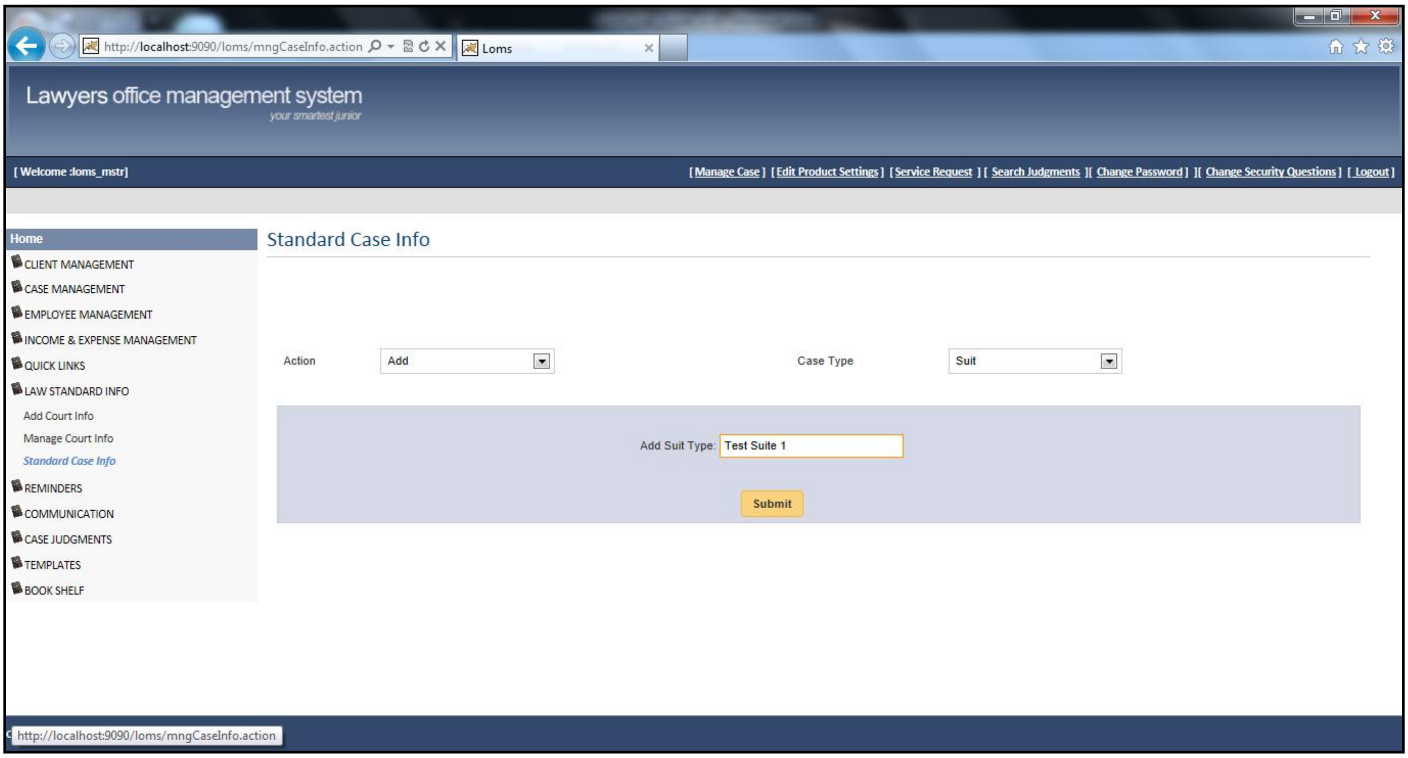
Step 1: Navigate to the link LAW STANDARD INFO > STANDARD CASE INFO



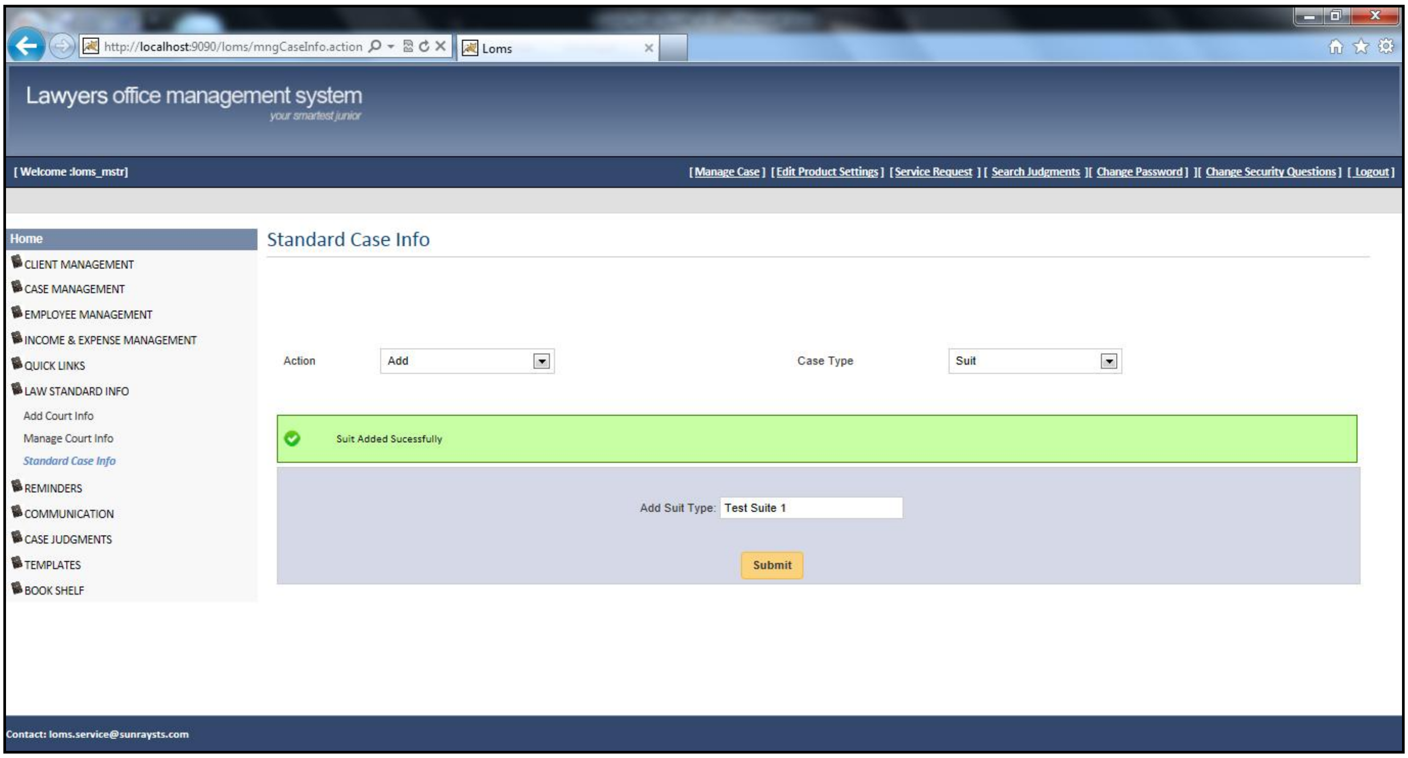
Step 2: Select action as "ADD" and select the Case Type (CIVIL / PETITION / SUIT / CRIMINAL). The application will ask for the Case Type to be added



Step 3: Enter the value for the Case Type field and click on SUBMIT button as shown below,

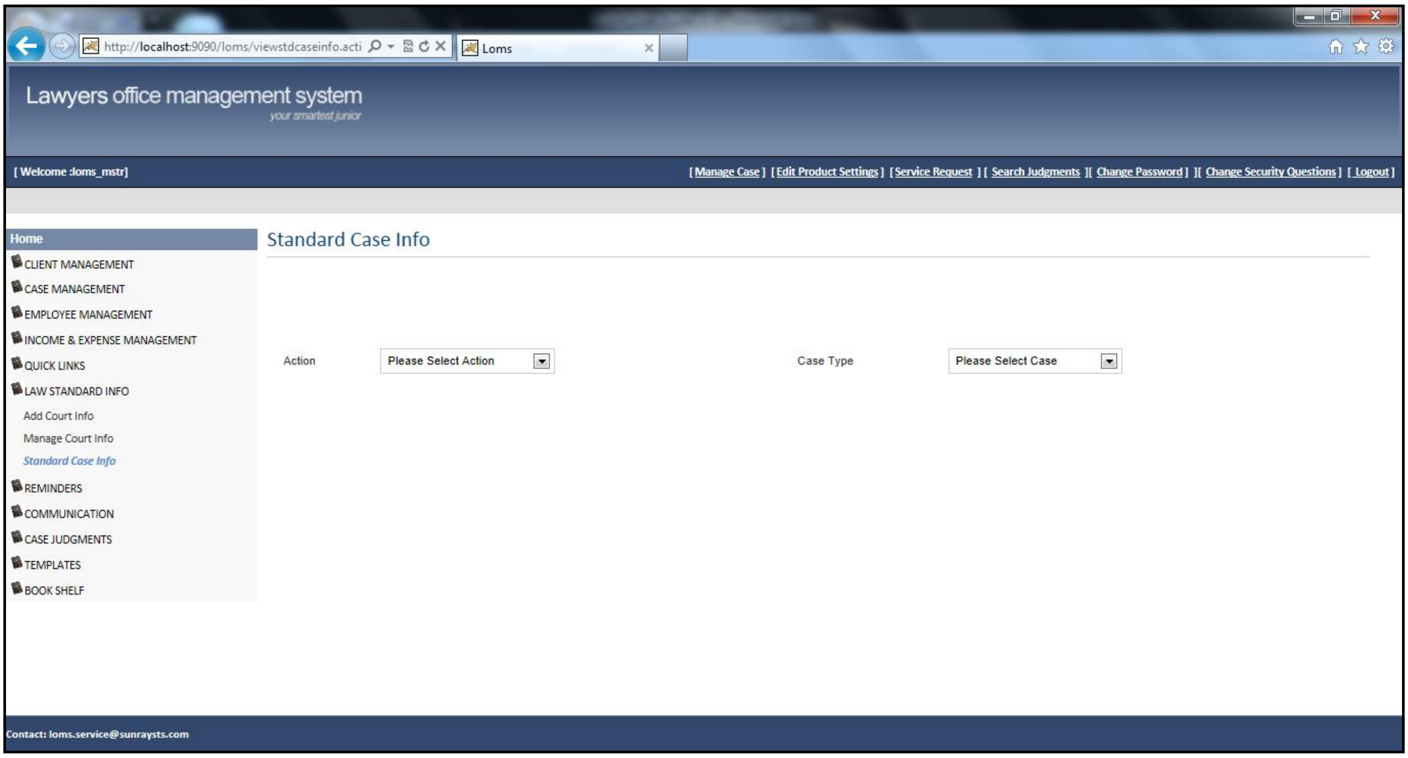


Step 4: Once the Case Type is added to the database, the application will list the message as shown below,

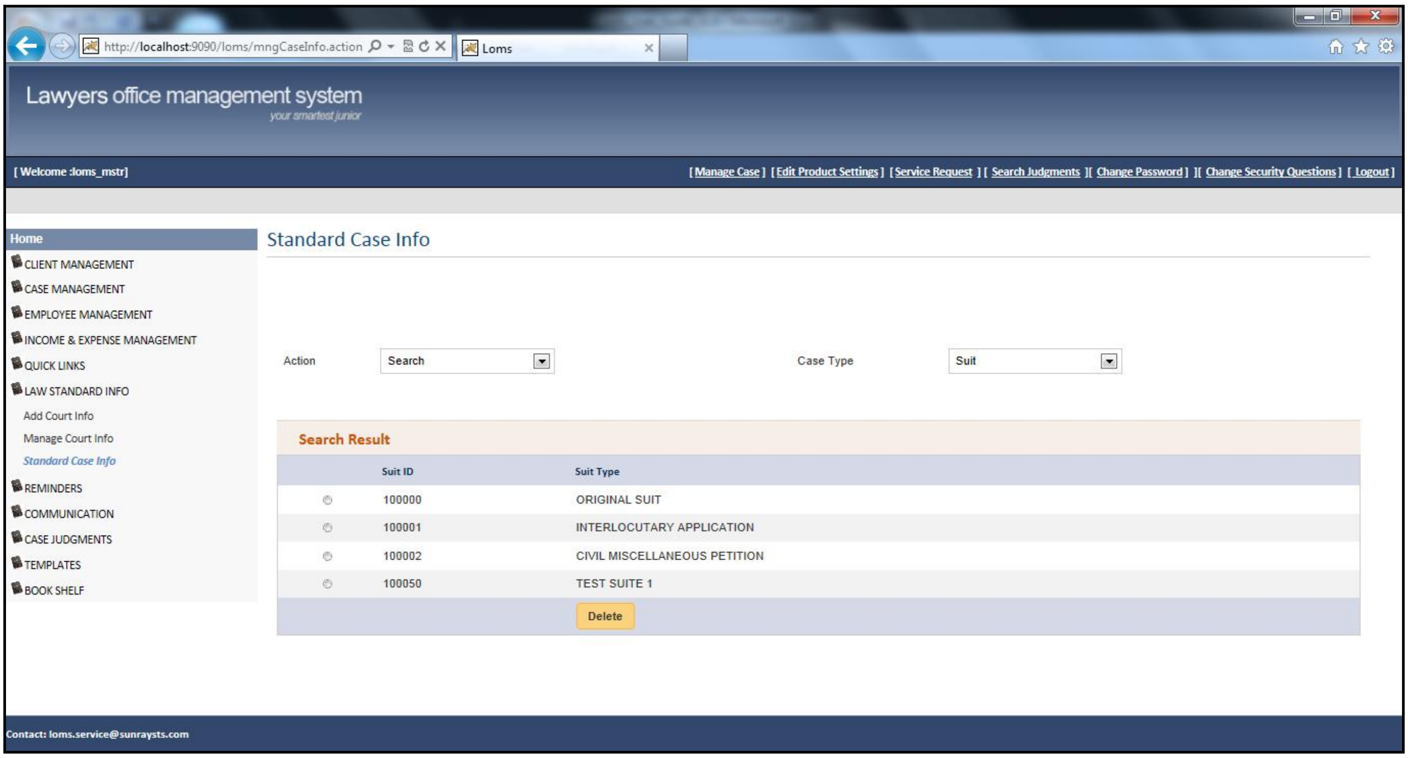


6.6. Search Case Type (Civil / Suit / Petition / Criminal)

Step 1: Navigate to the link LAW STANDARD INFO > STANDARD CASE INFO

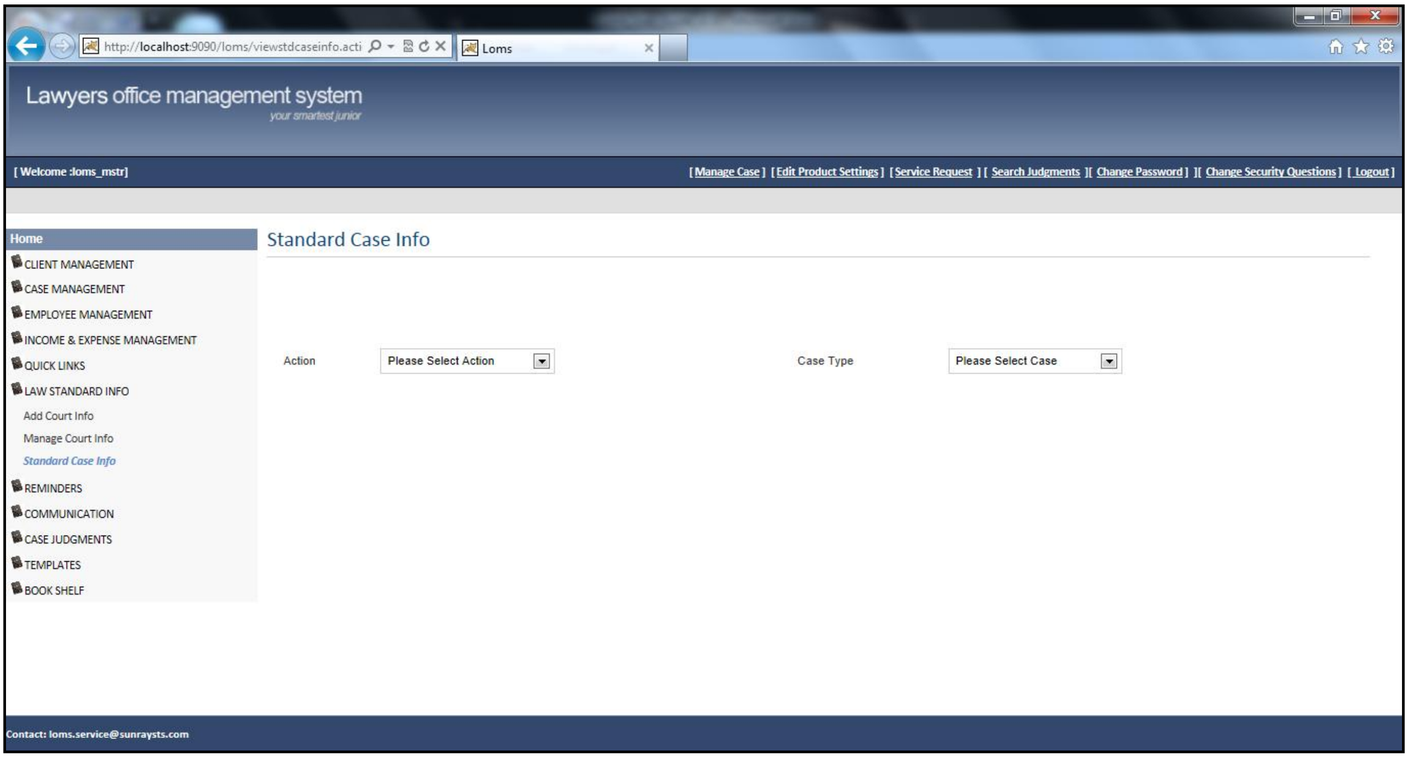


Step 2: Select action as “SEARCH” and select the Case Type (CIVIL / PETITION / SUIT / CRIMINAL). The application will list all the case types of that sort

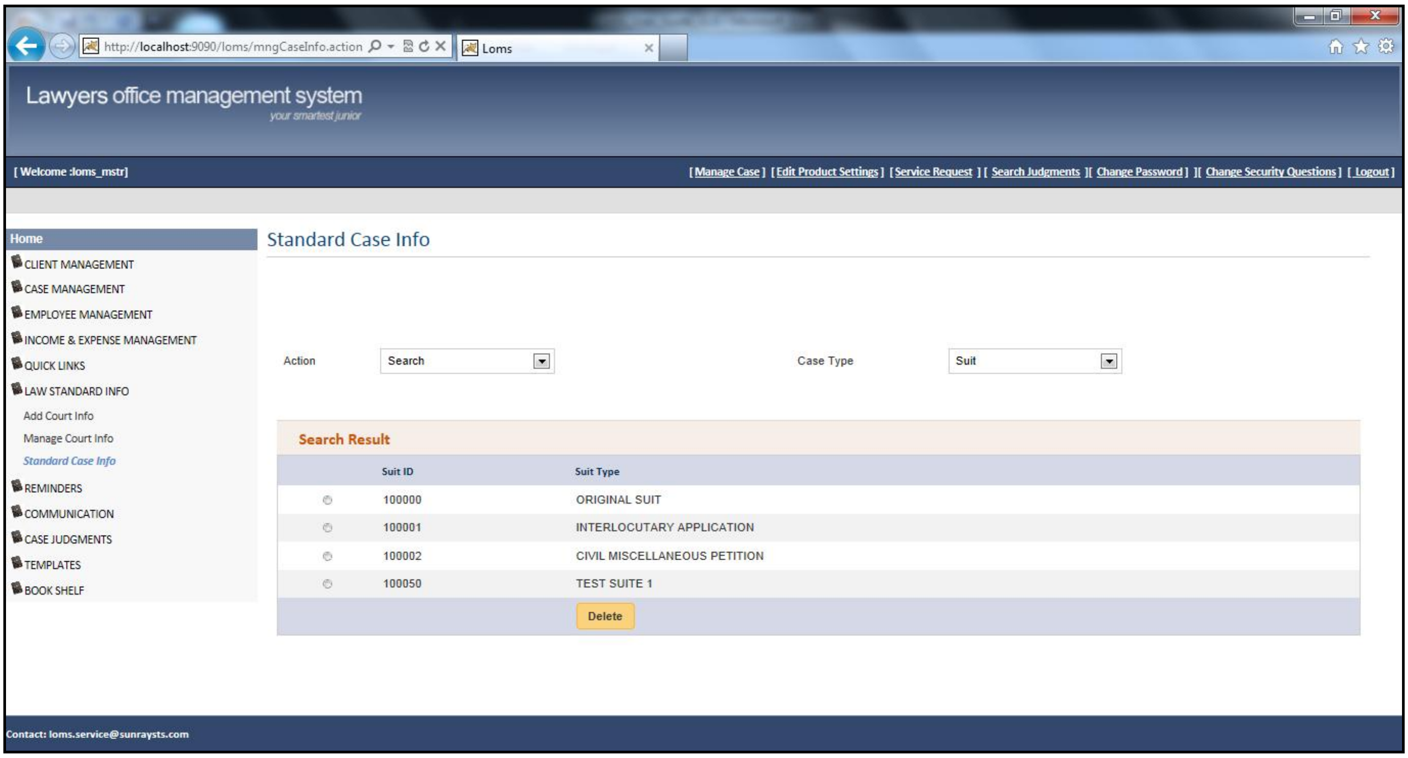


6.7. Delete Case Type (Civil / Suit / Petition / Criminal)

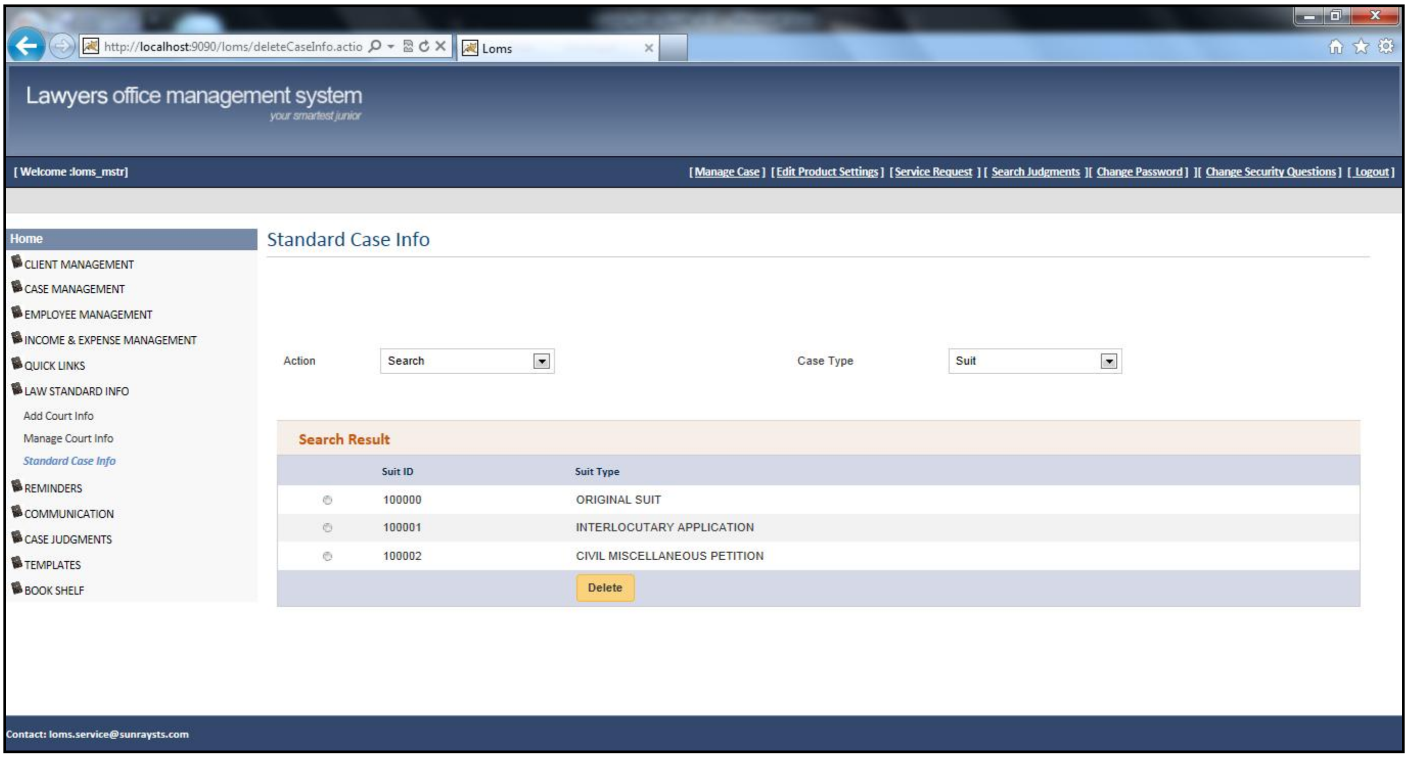
Step 1: Navigate to the link LAW STANDARD INFO > STANDARD CASE INFO



Step 2: Select action as "SEARCH" and select the Case Type (CIVIL / PETITION / SUIT / CRIMINAL). The application will list all the case types of that sort. Select the case type you wish to delete and click on the DELETE button



Step 3: When the user clicks on the DELETE button, the application will remove the case type from the database as shown below,

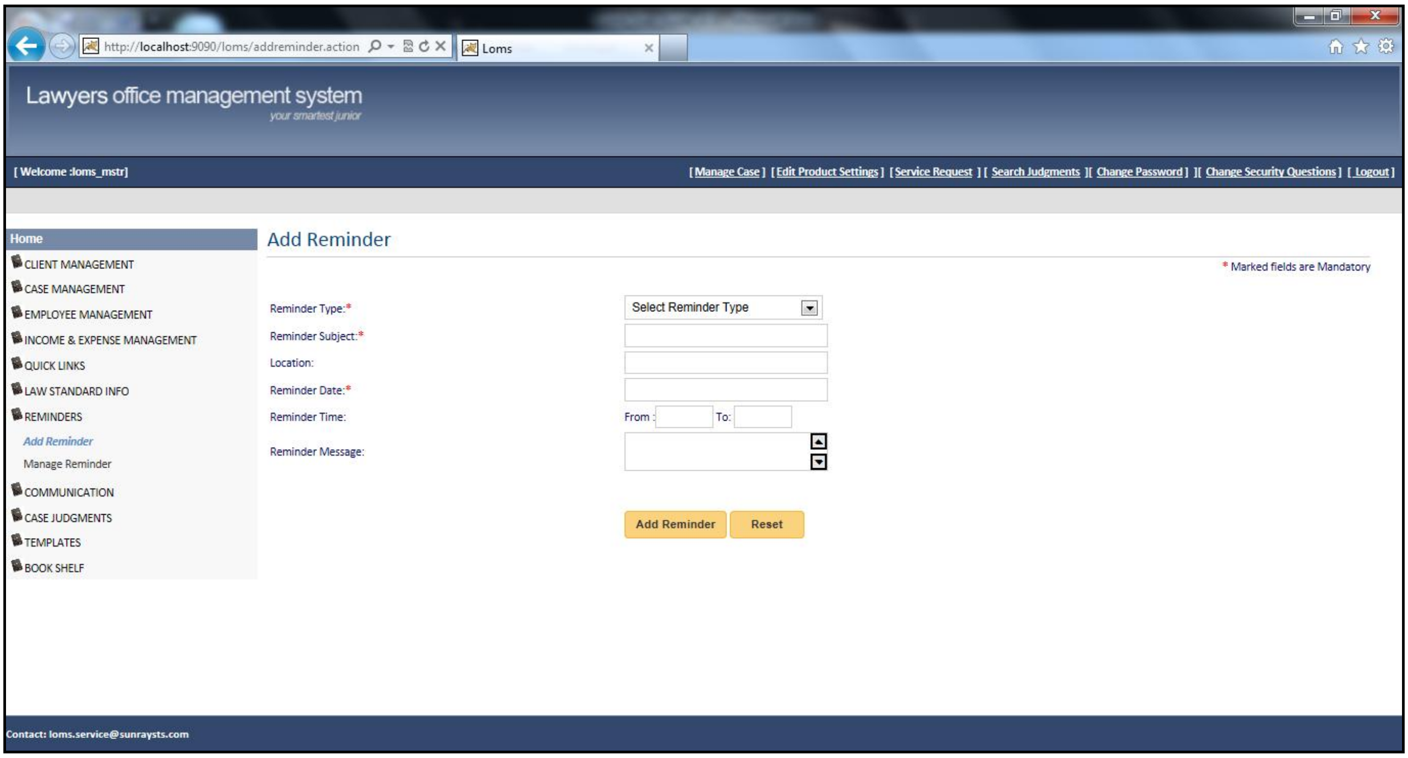


NOTE: User can ADD, SEARCH, DELETE Standard Case Types. There is no option to modify / edit / update Standard case types.

7. Reminder Management

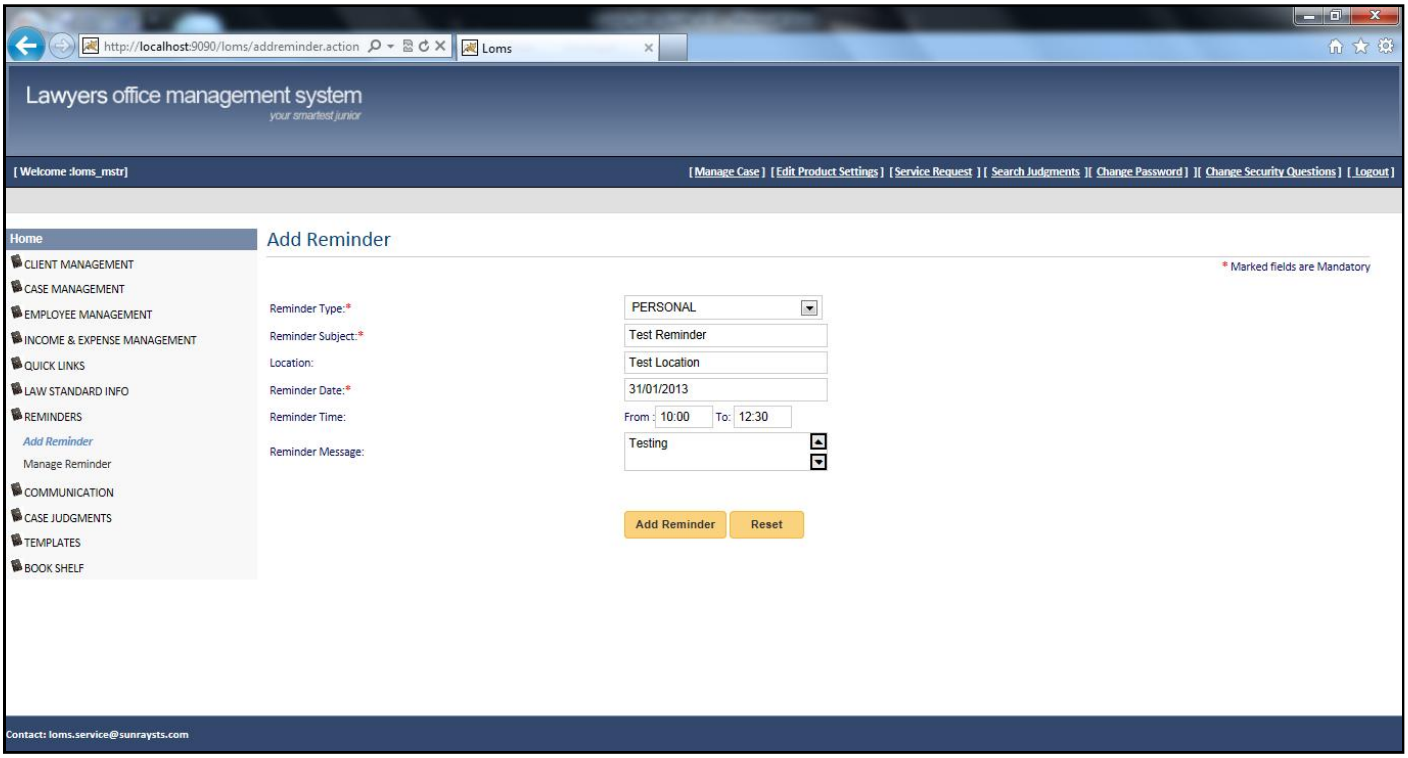
7.1. Add Reminder Information

Step 1: Navigate to the link REMINDERS > ADD REMINDER

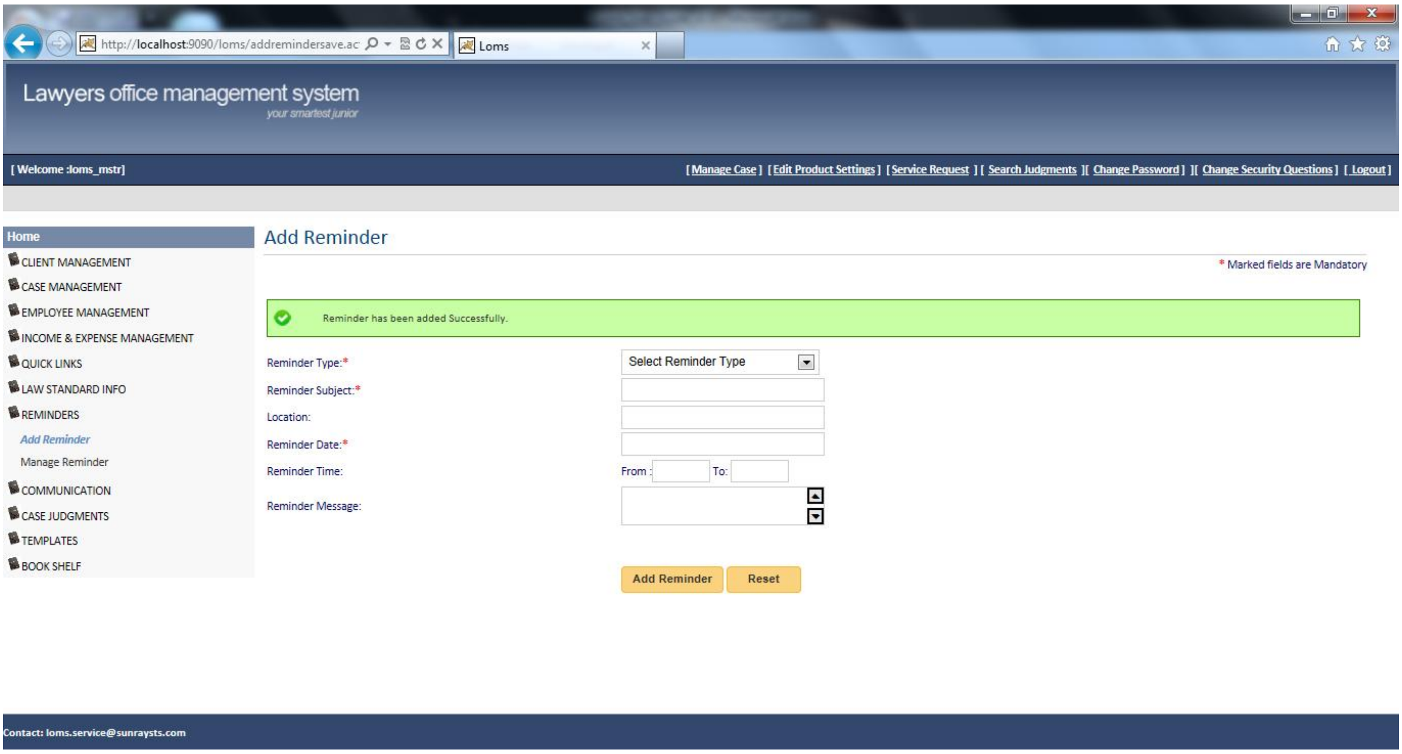


Step 2: Enter the value for the reminder fields as shown in the image below,

NOTE: Select Reminder Type as "PERSONAL" if the reminder is self notification, "OFFICIAL" if the reminder is for the entire team at the office or individual user name if it is for specific employee in the office

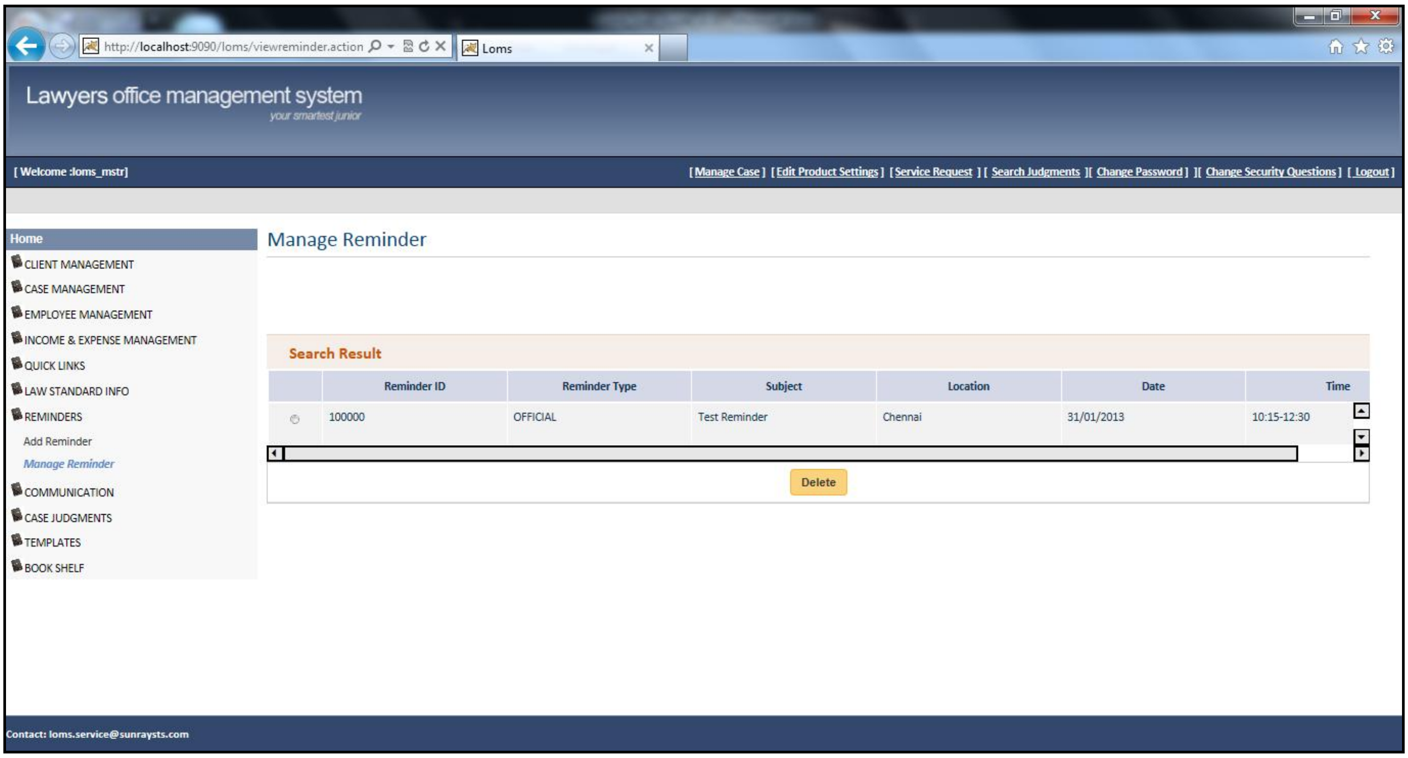


Step 3: After entering the value for all the fields, click on the "ADD REMINDER" button. Once the data is added to the database, the application will display the message as shown below,

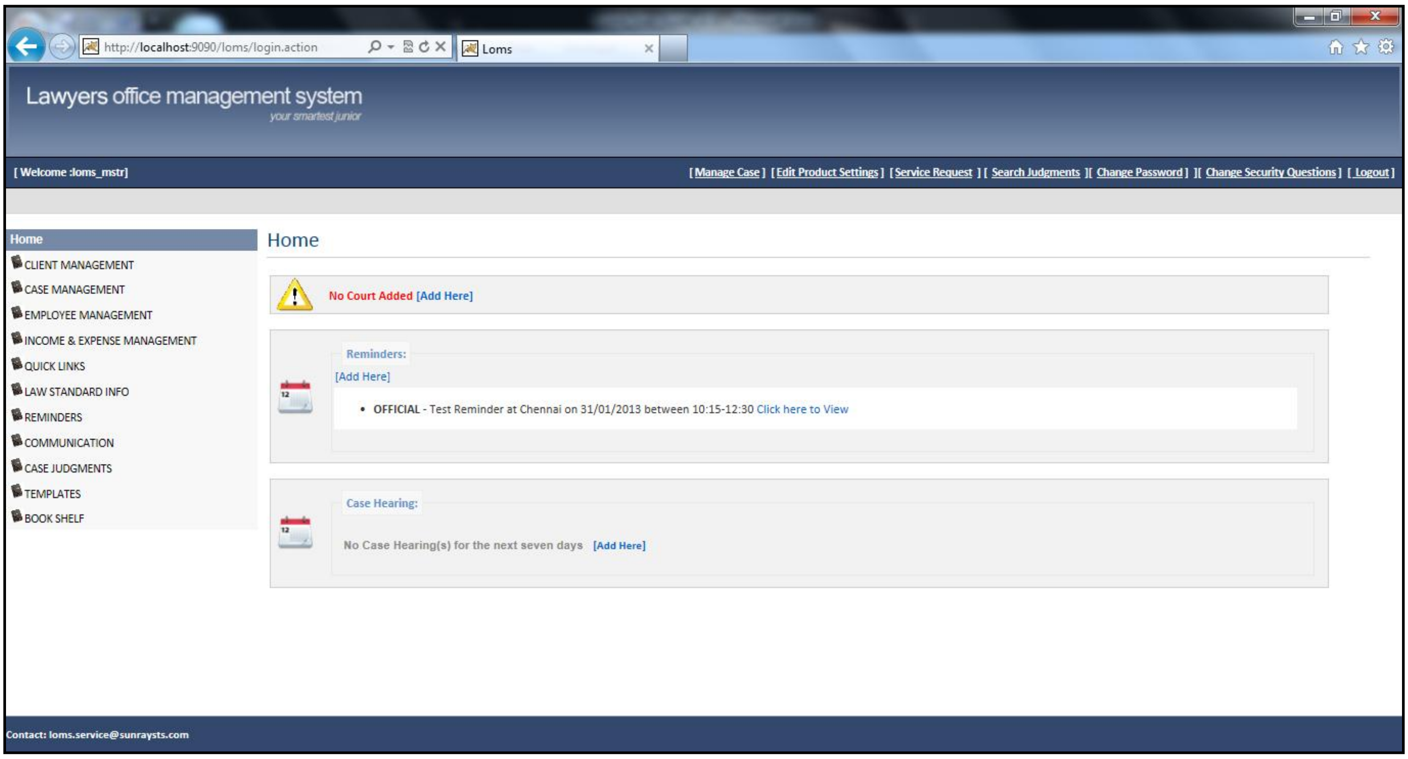


7.2. Search Reminder Information

Step 1: Navigate to the link REMINDERS > Manage Reminder. The application will list all the reminders added by the user as shown below,

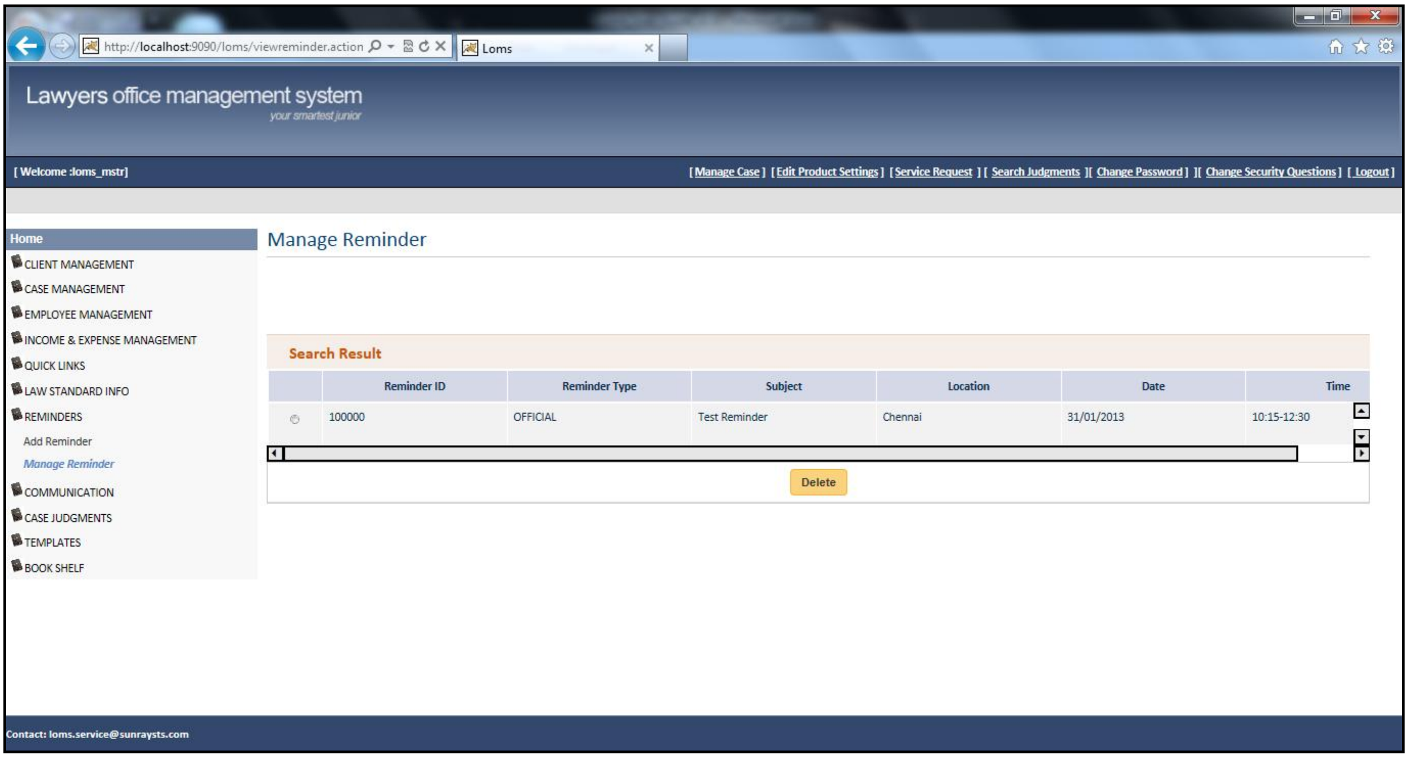


NOTE: The application will display the reminder on the dashboard if the Reminder date is less than or equal to seven days from the current date as shown below,

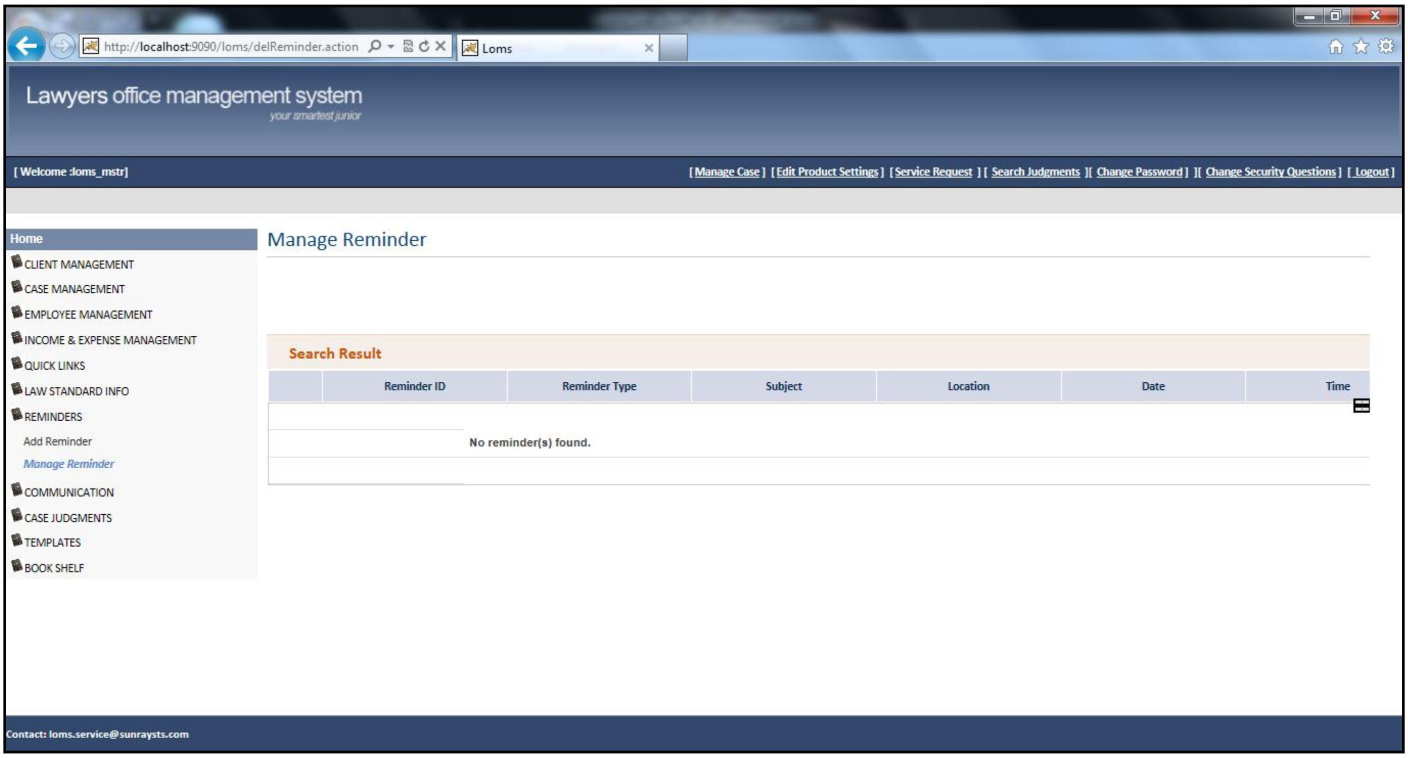


7.3. Delete Reminder Information

Step 1: Search for the Event Reminder Information as explained in the “Search Reminder Information” section above



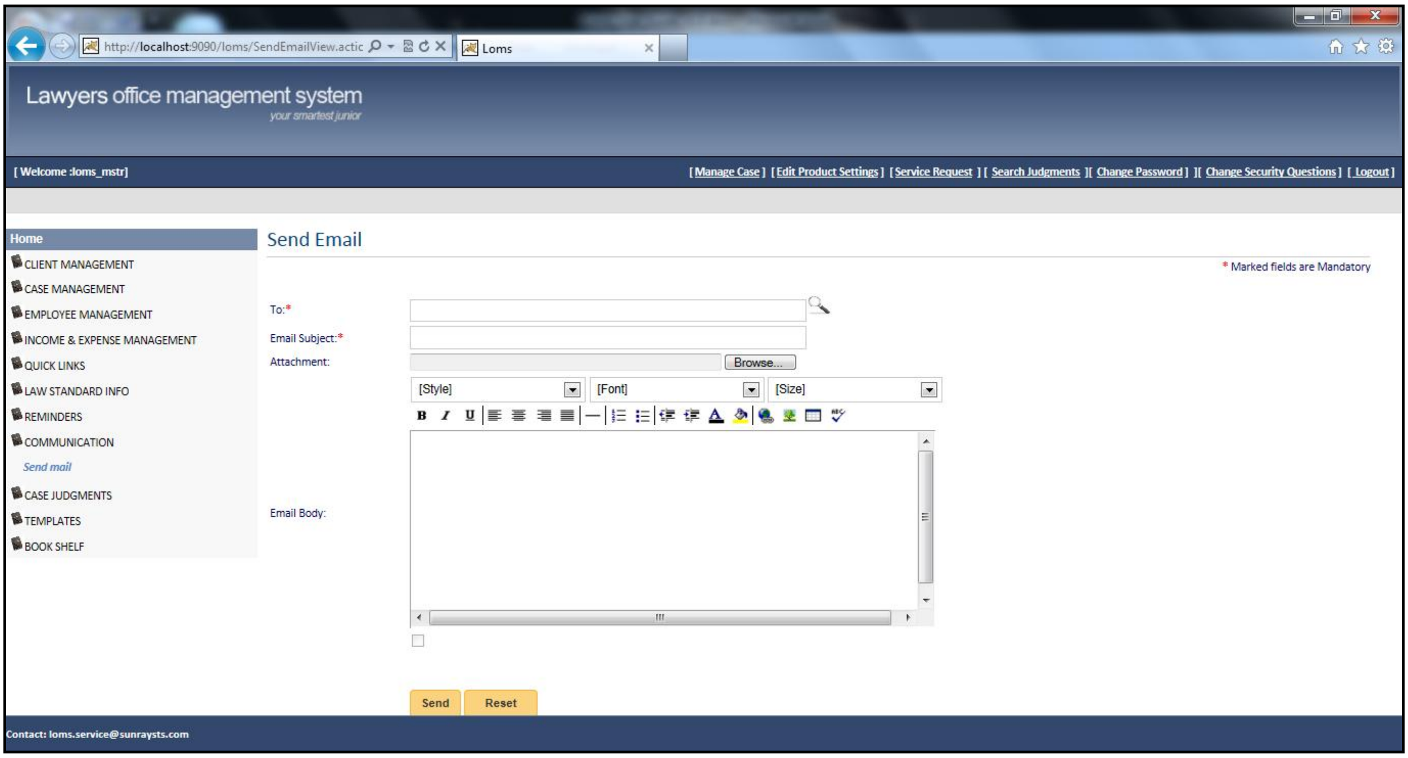
Step 2: Select the Reminder you wish to delete and click on the DELETE button. The application will delete the reminder as shown below,



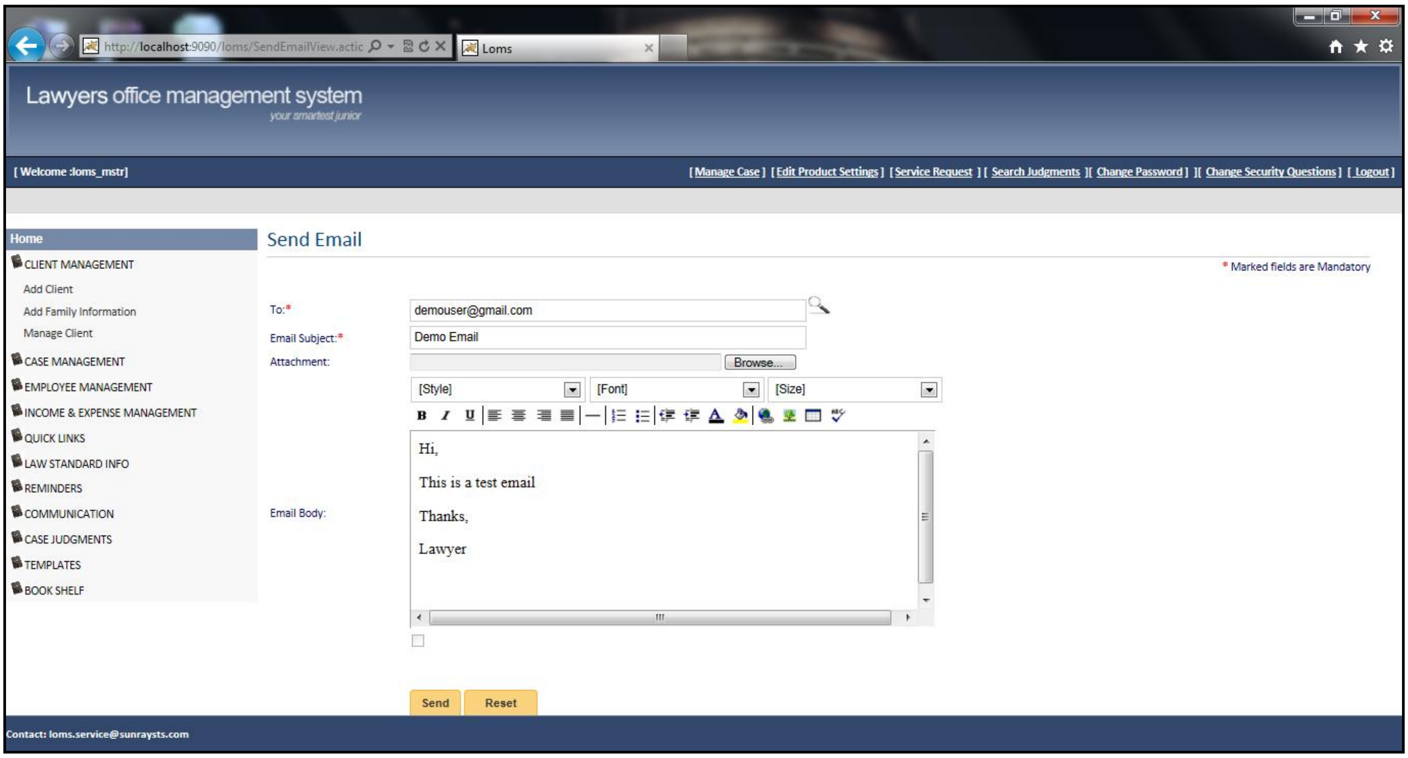
8. Communication

8.1. Send Email

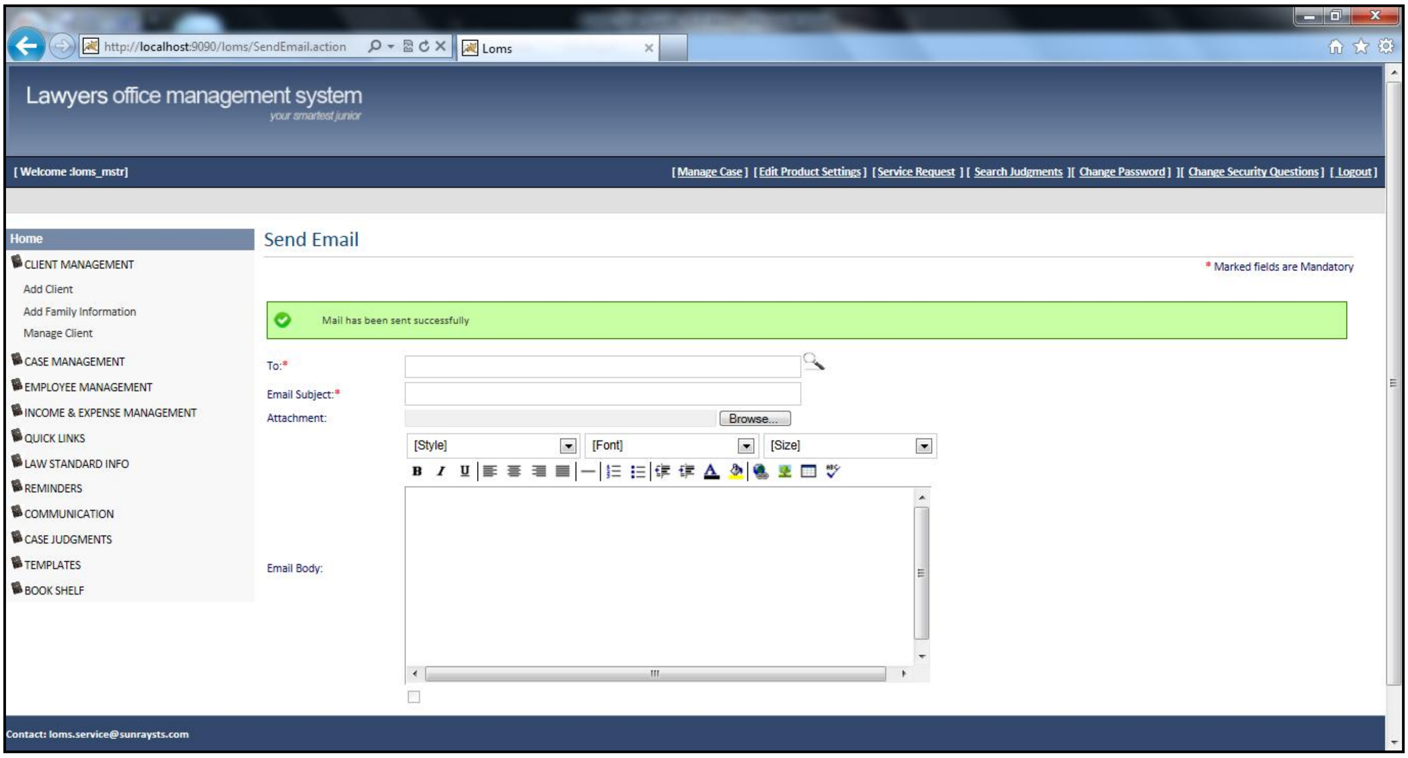
Step 1: Navigate to the link COMMUNICATION > SEND EMAIL



Step 2: The user can compose the email normally as they would do it in any email websites. To send an email to an client, the user can click on the magnifier symbol near the TO field and search the client email id



Step 3: Click on the SEND button after composing the email. Once the email has been sent the application will display a success message as shown below,

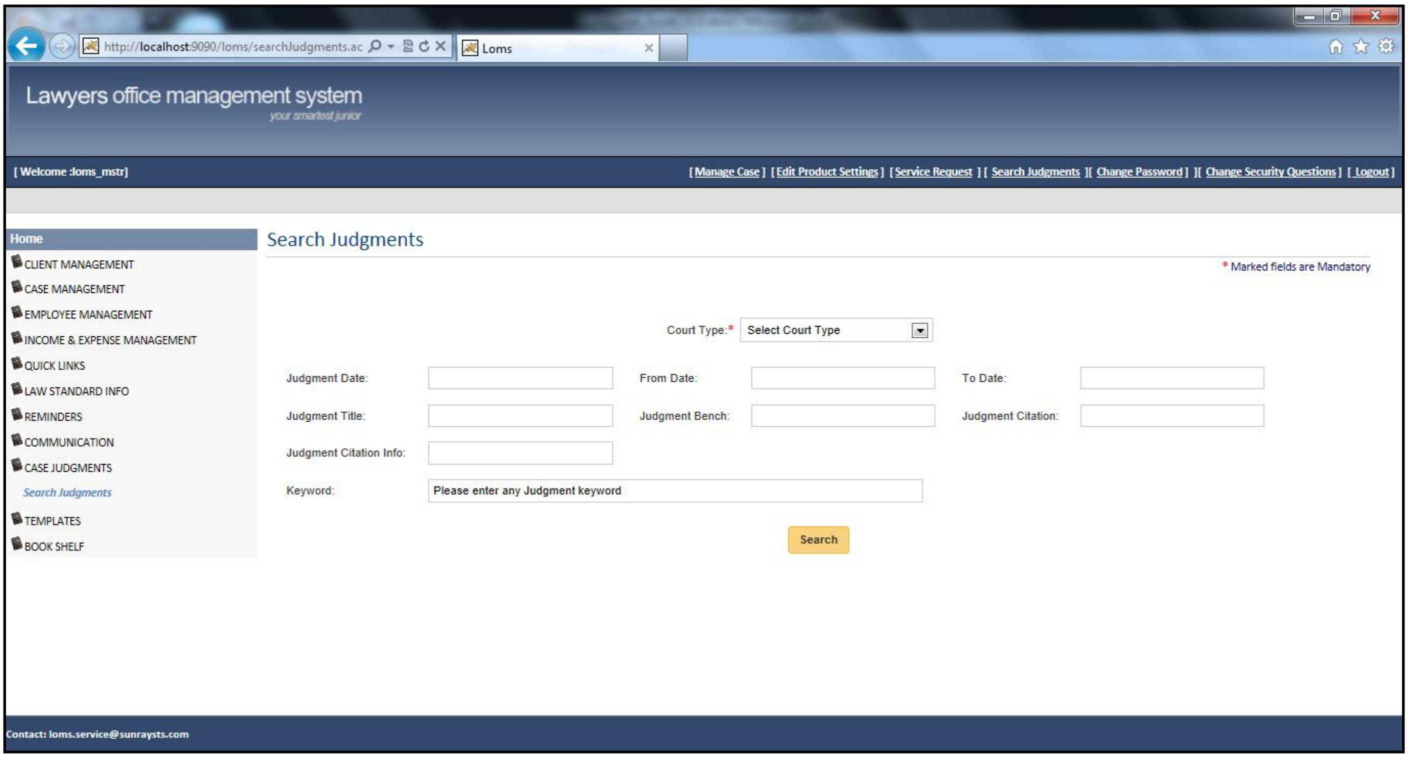


NOTE: The application will use the Lawyer's registration credentials to SEND EMAIL. Please be careful with the mail content and the option usage.

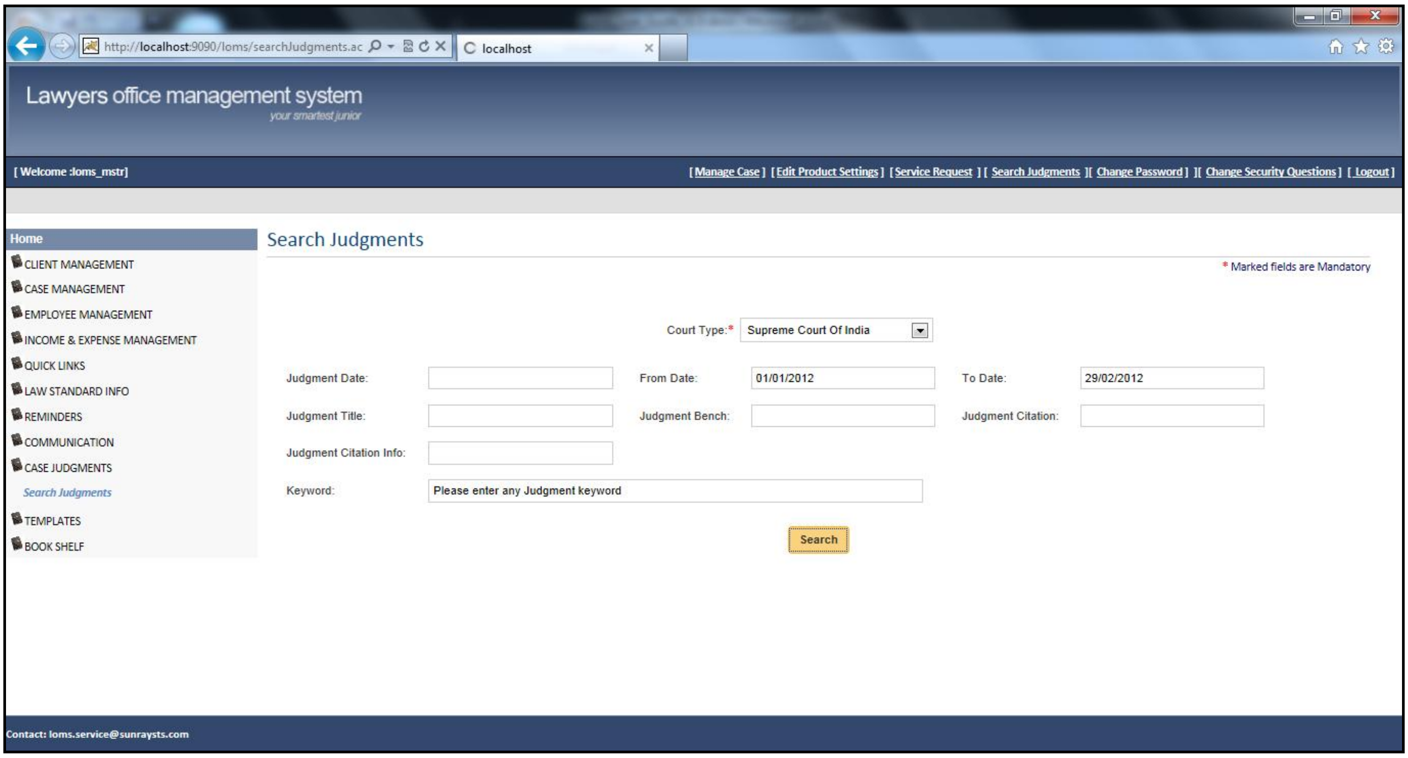
9. Case Judgments

9.1. Search Case Judgments

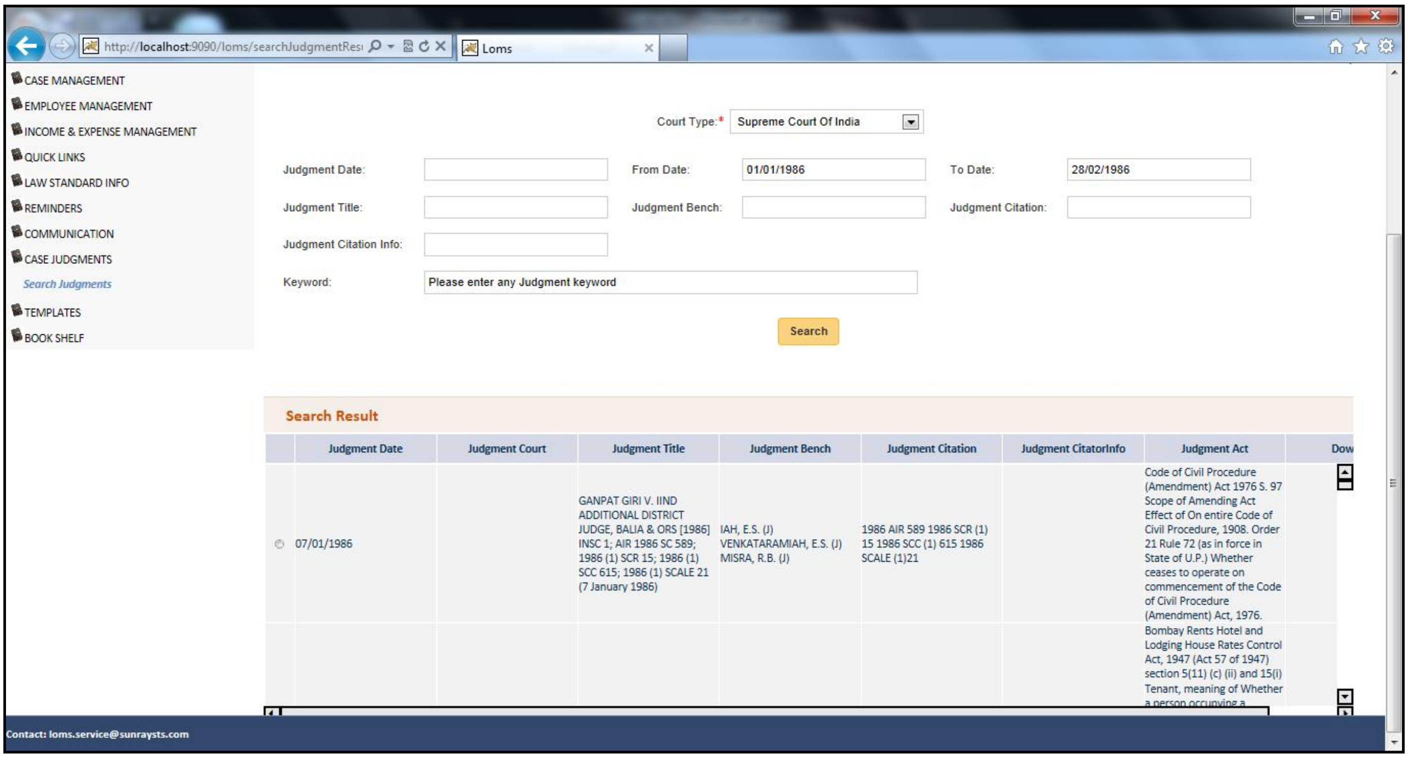
Step 1: Navigate to the link CASE JUDGMENTS > SEARCH JUDGMENTS



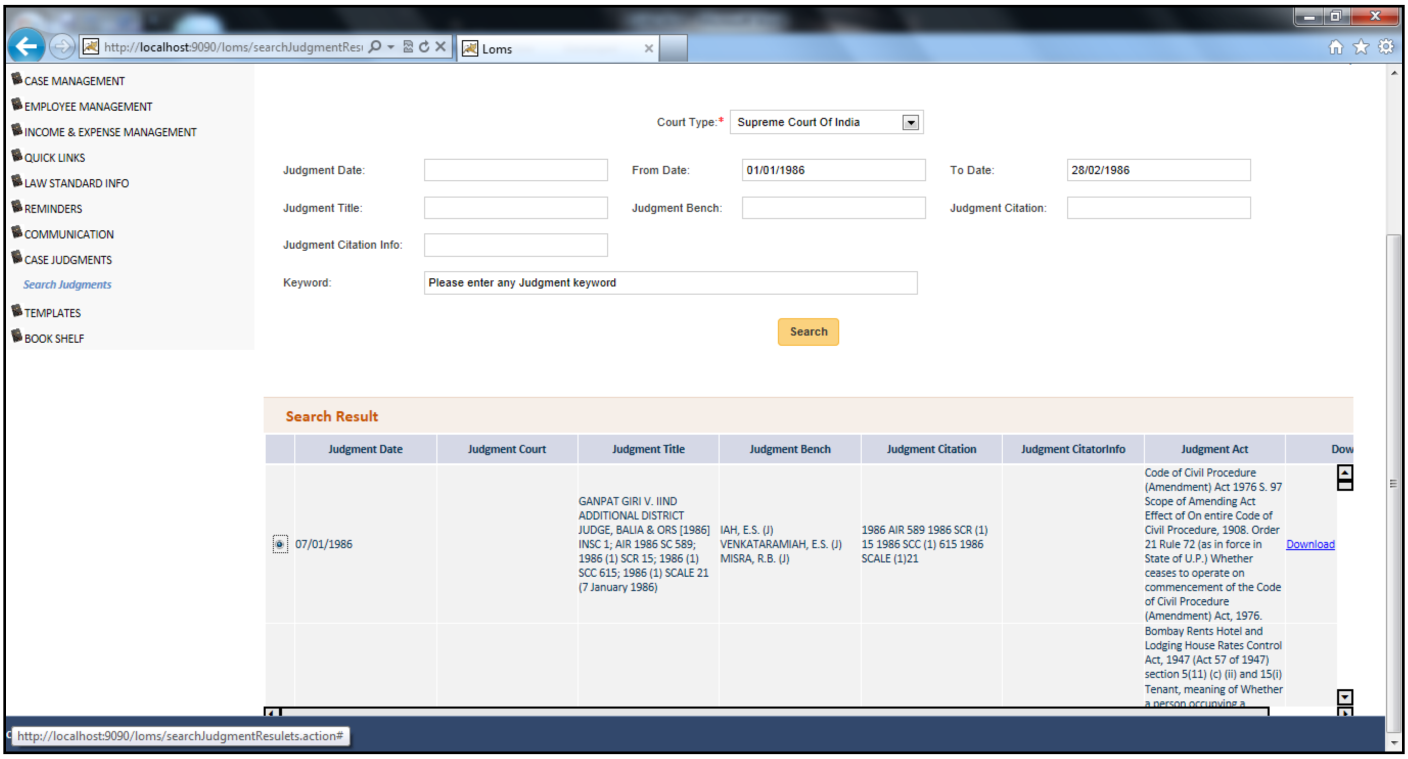
Step 2: Select the Court Type and enter the value for any of the Search Criteria and click on the SEARCH button.



Step 3: The application will list all the Judgments matching the Search Criteria as shown below,



Step 4: Select the Judgment you wish to download and click on the DOWNLOAD link to download the same as shown below

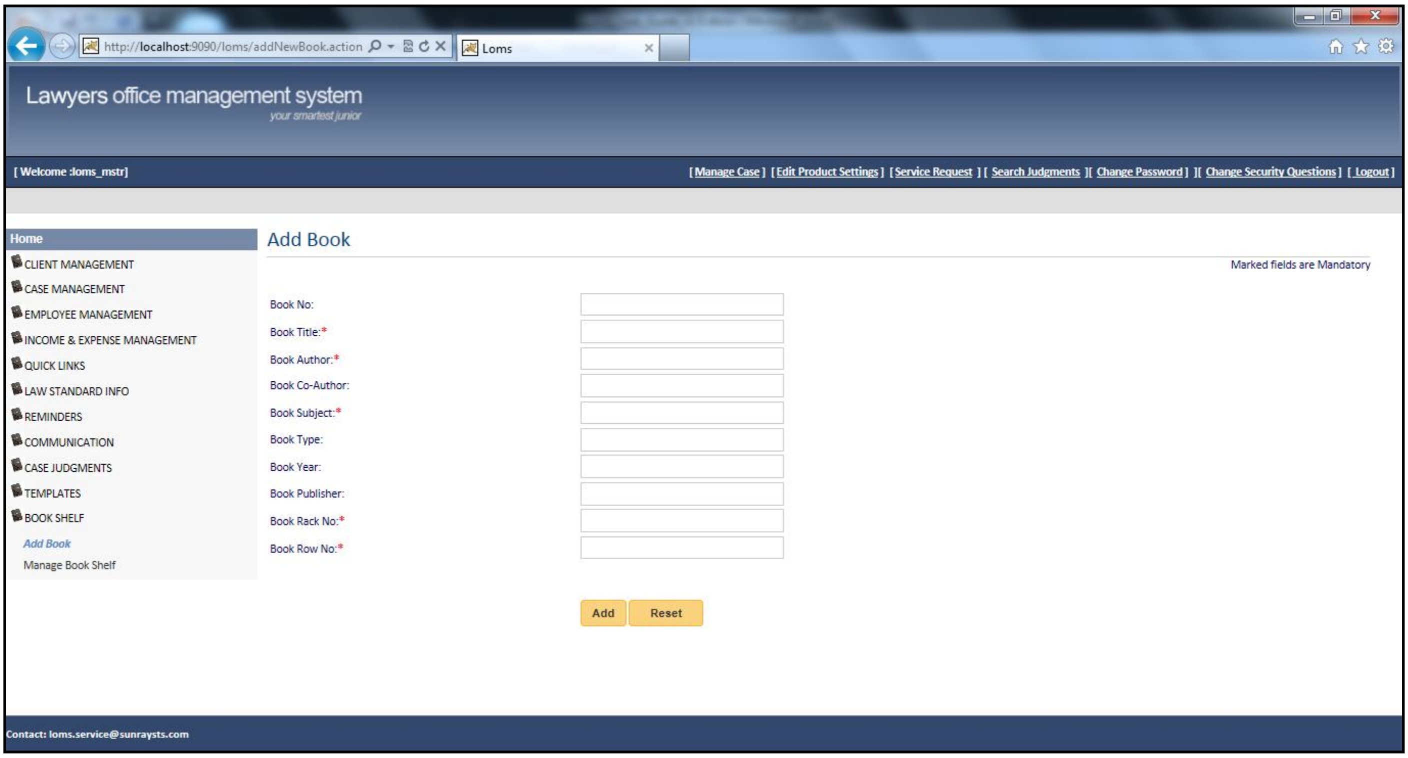


10. Templates

11. Book Shelf

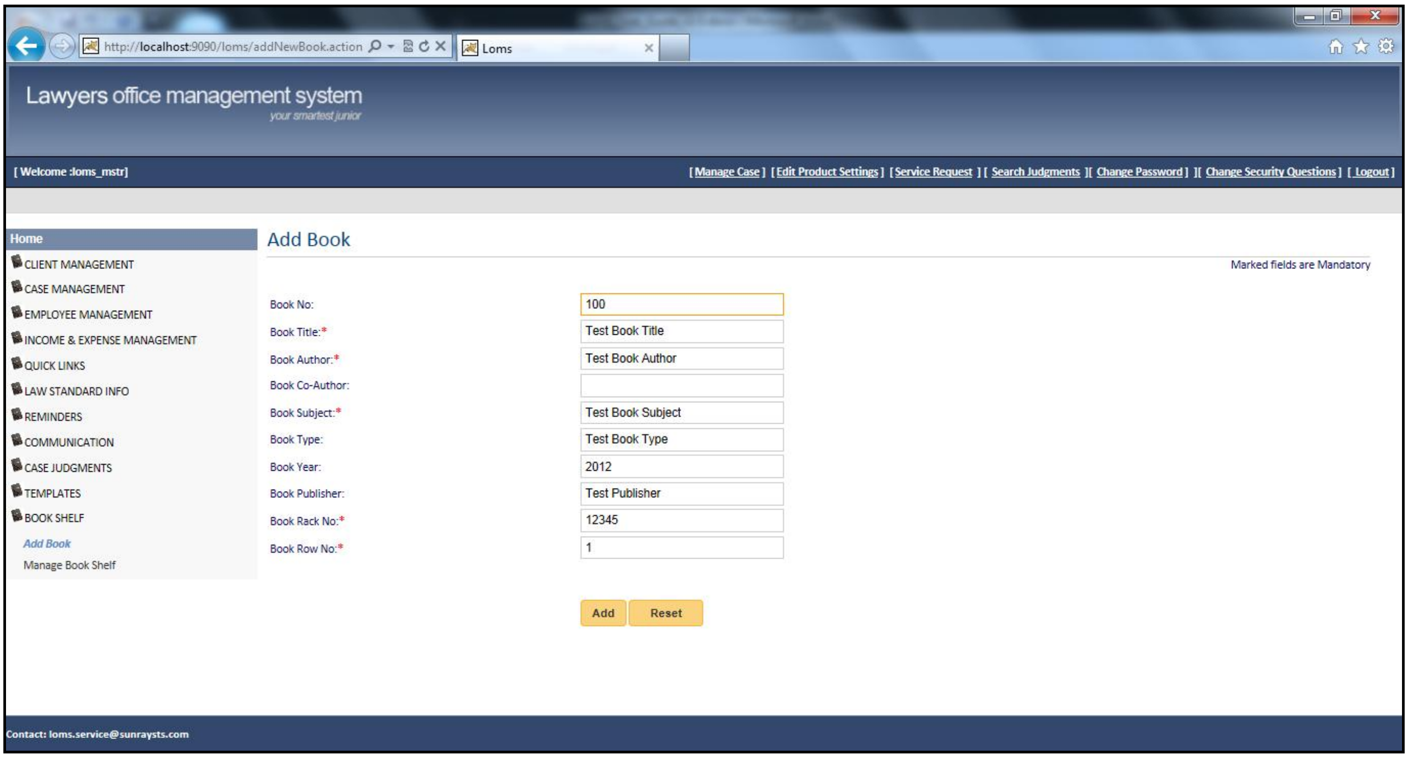
11.1. Add Book Information

Step 1: Navigate to the link BOOK SHELF > ADD BOOK

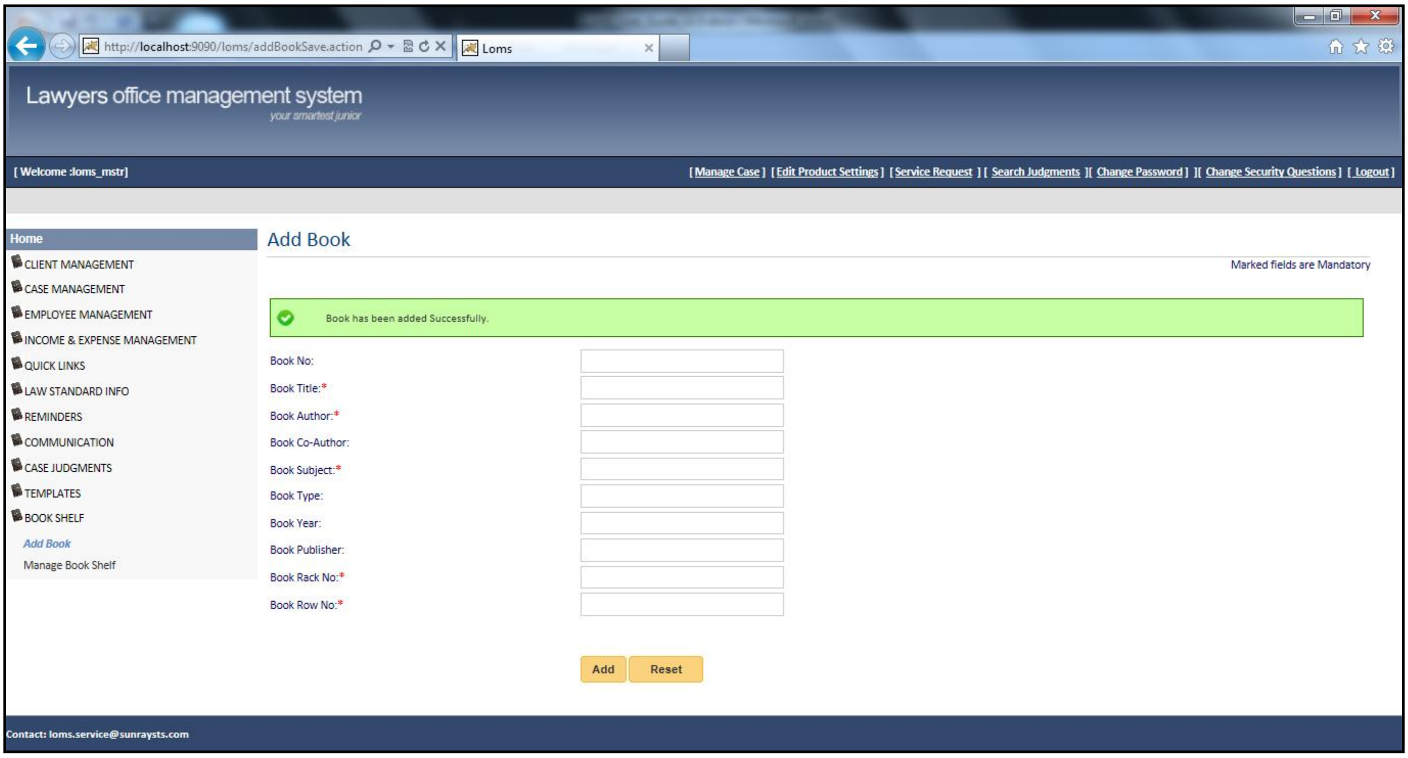


Step 2: Enter the values for the Book Details as shown below,

NOTE: The **Book Title, Book Author, Book Subject, Book Rack No and Book Row No** are mandatory fields. Application will not allow the user to add a Book Information to the database without the value for these fields.

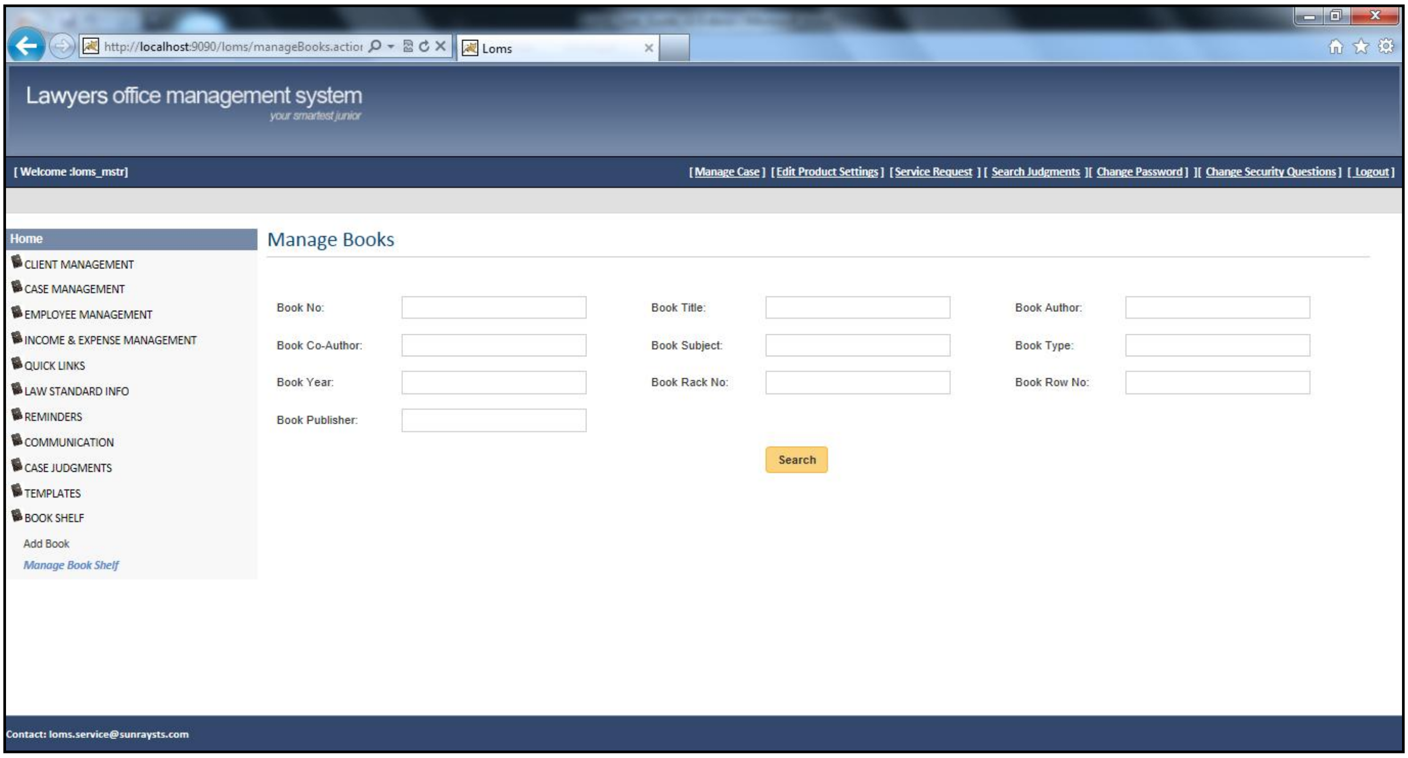


Step 3: After entering the value for all the book information fields, click on the ADD button. Once the book information has been added to the database, the application will give a success message as shown below,

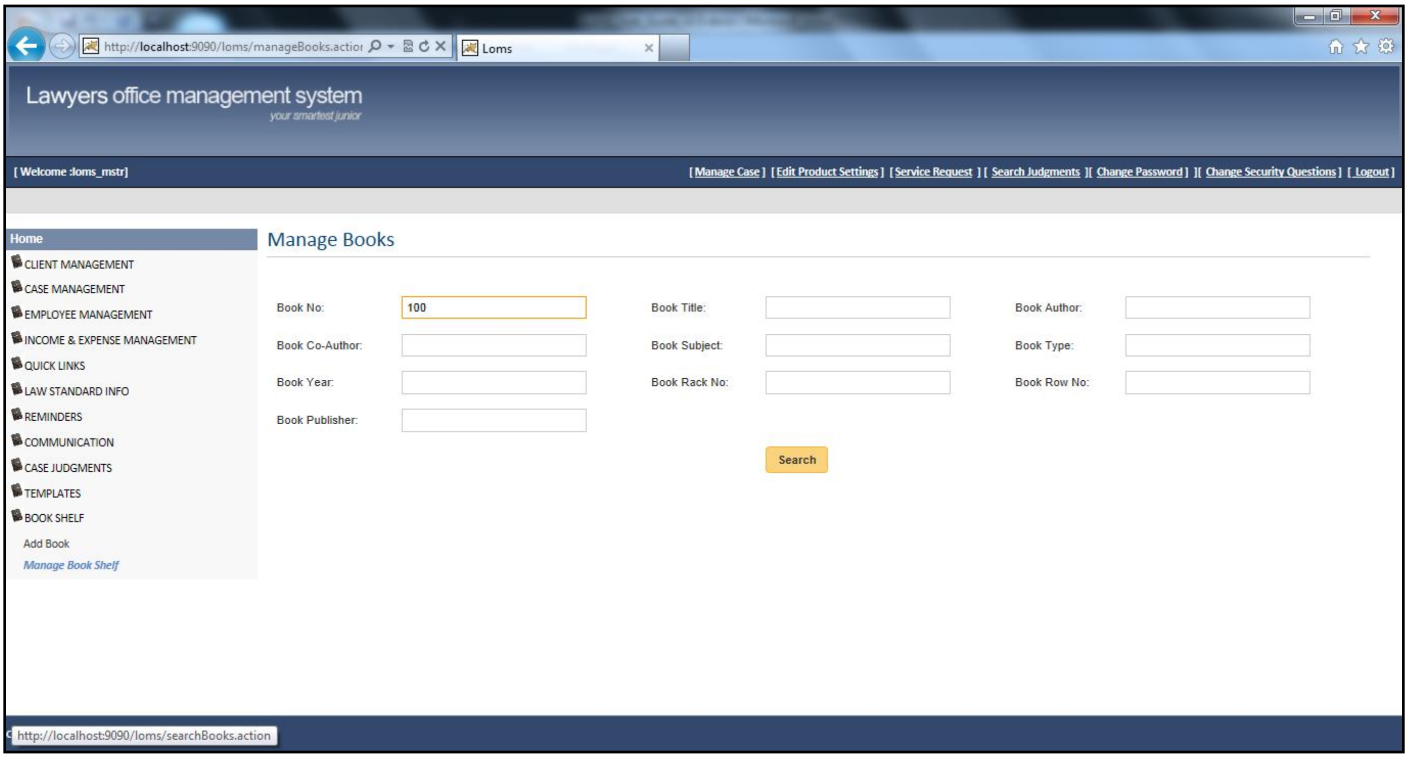


11.2. Search Book Information

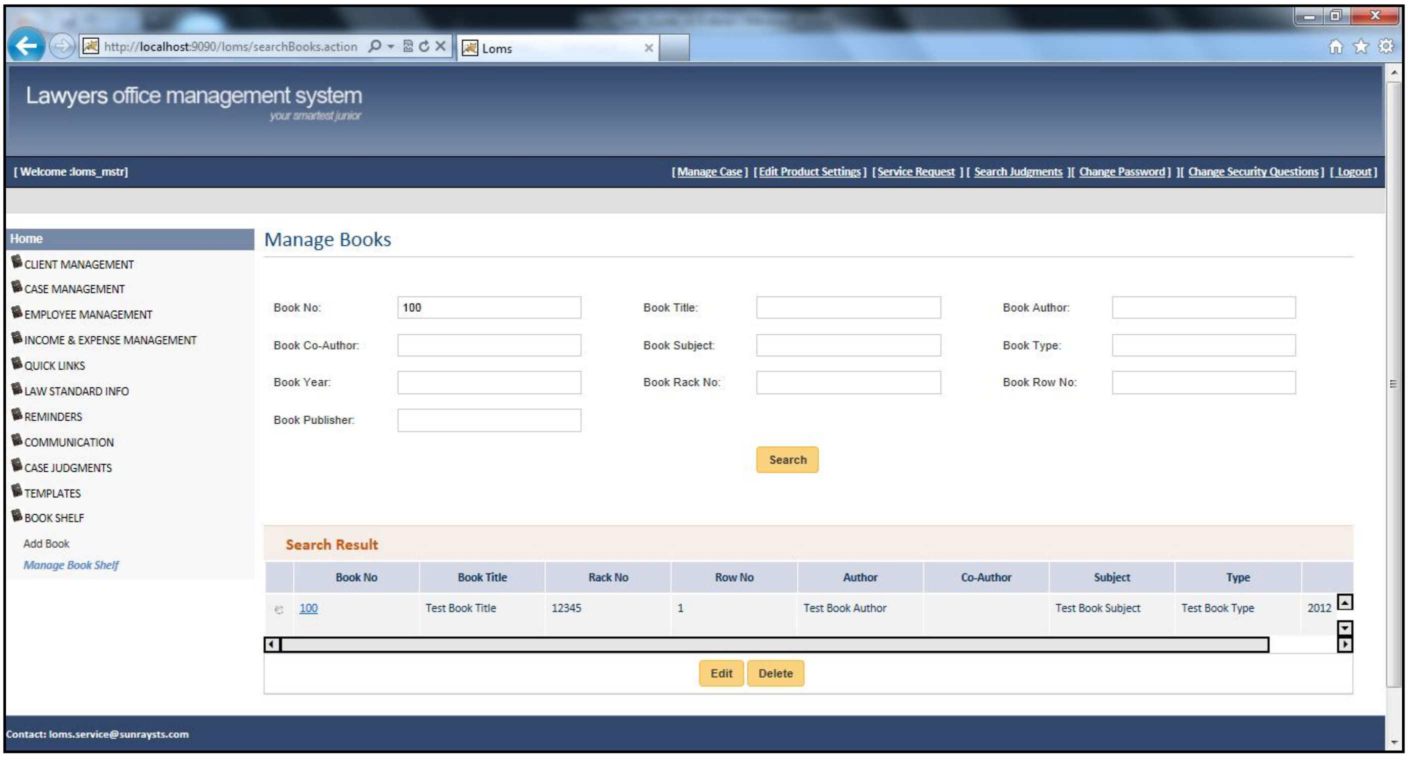
Step 1: Navigate to the link BOOK SHELF > MANAGE BOOK SHELF as shown below,



Step 2: Enter the value for any of the Book search criteria as shown in the image below and click on the SEARCH button.

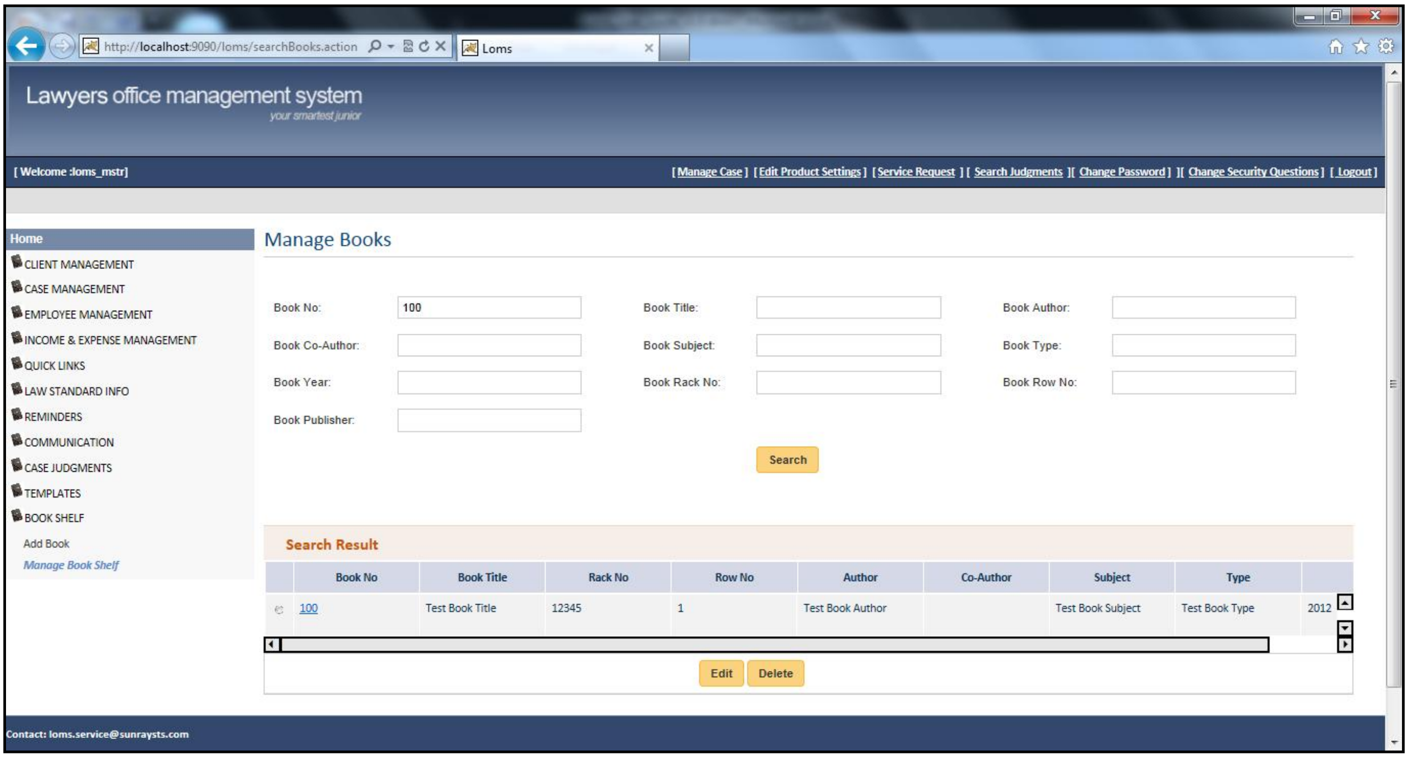


Step 3: When the user clicks on the SEARCH button, the application will list all the book information related to the SEARCH criteria as shown below,

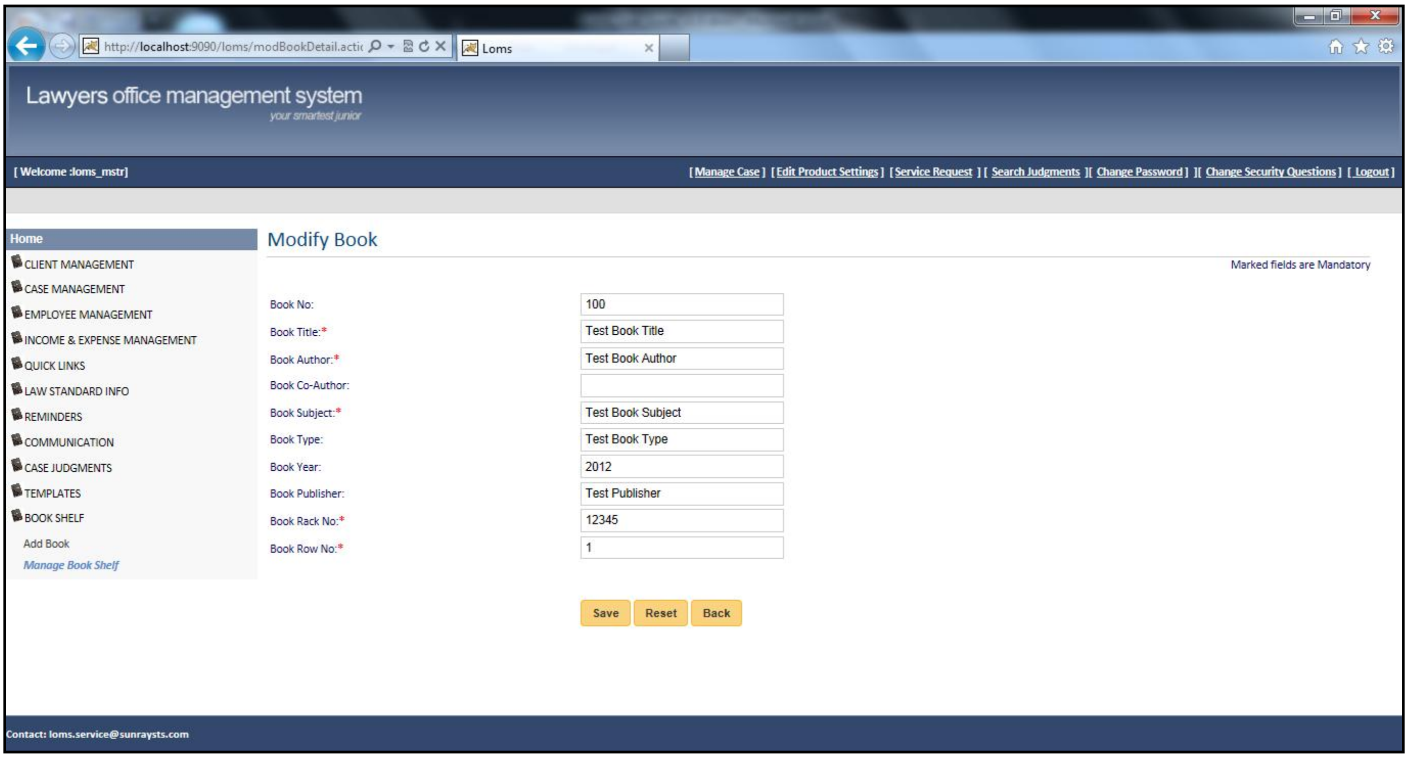


11.3. Update Book Information

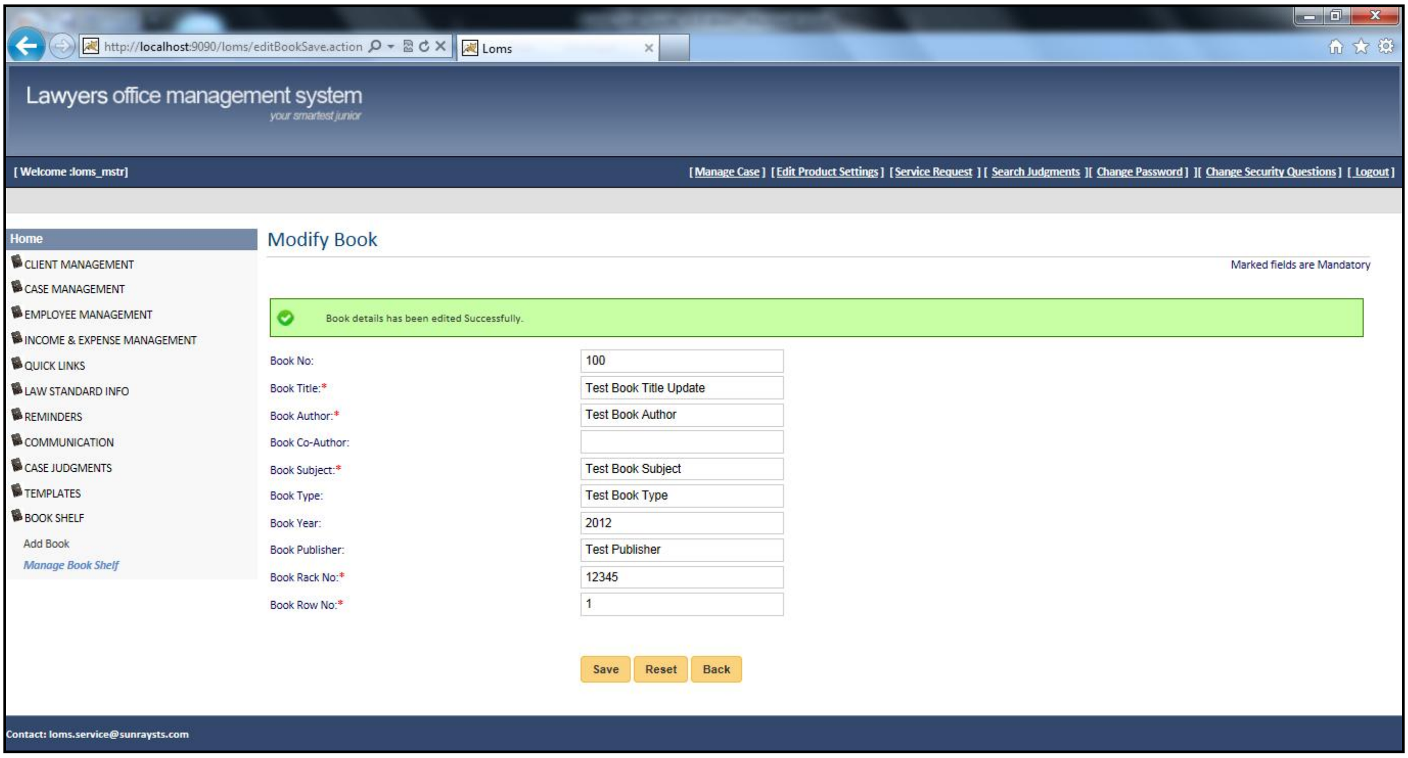
Step 1: Search for the Book Information as explained in the Search Book Information section above,



Step 2: Select the Book detail you wish to edit / update and click on the EDIT button. The application will load the book information as shown below,

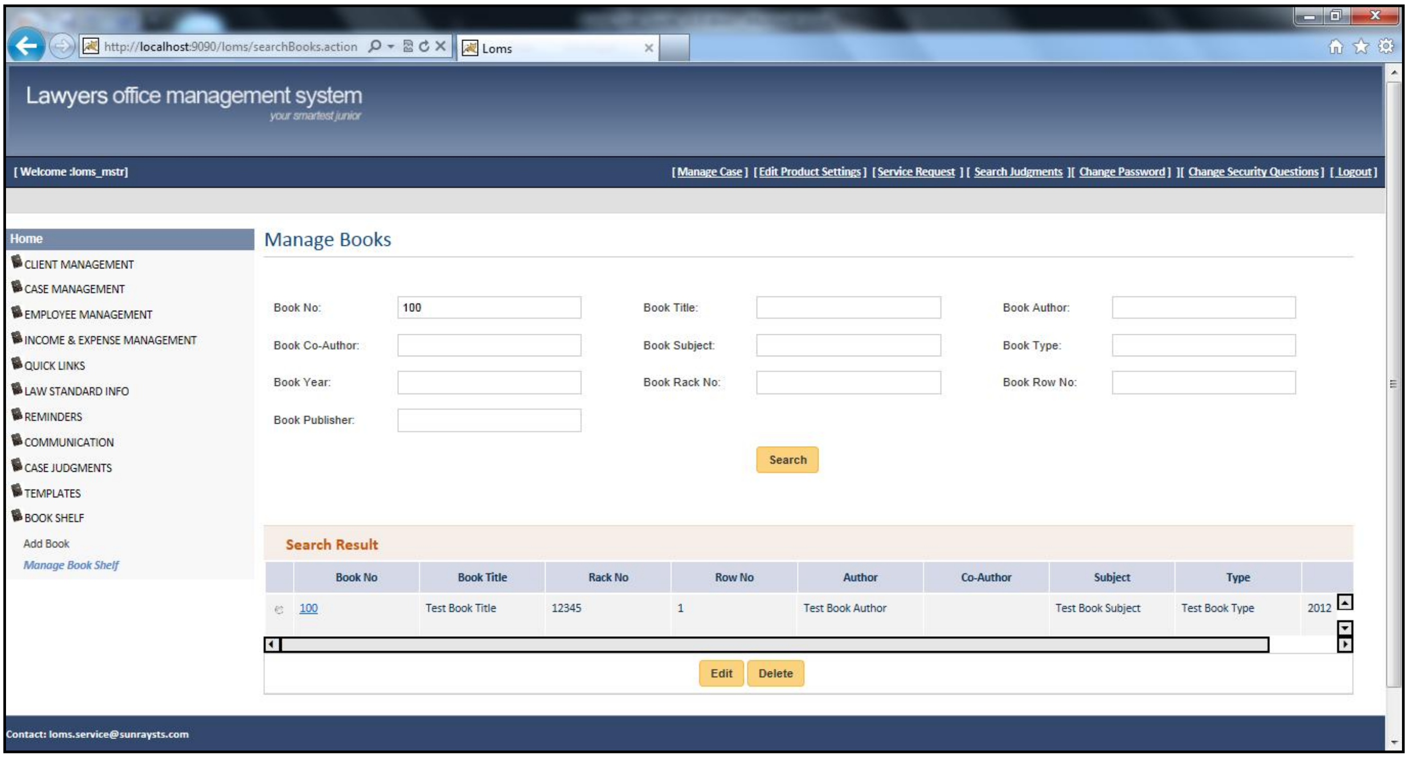


Step 3: Update the book details in the Modify Book Information page as show above and click on the SAVE button. Once the details are updated to the database the application will give a success message as shown below,

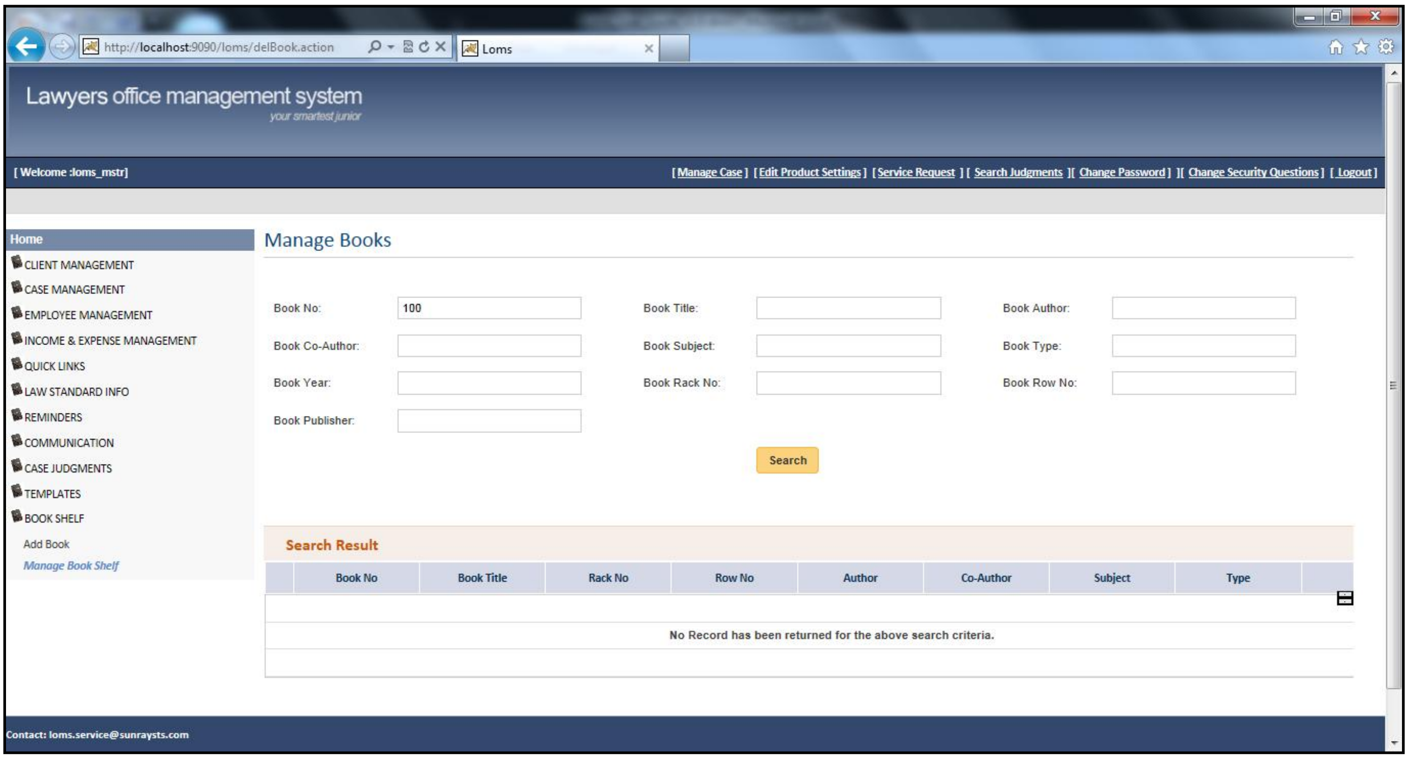


11.4. Delete Book Information

Step 1: Search for the Book Information as explained in the Search Book Information section above,



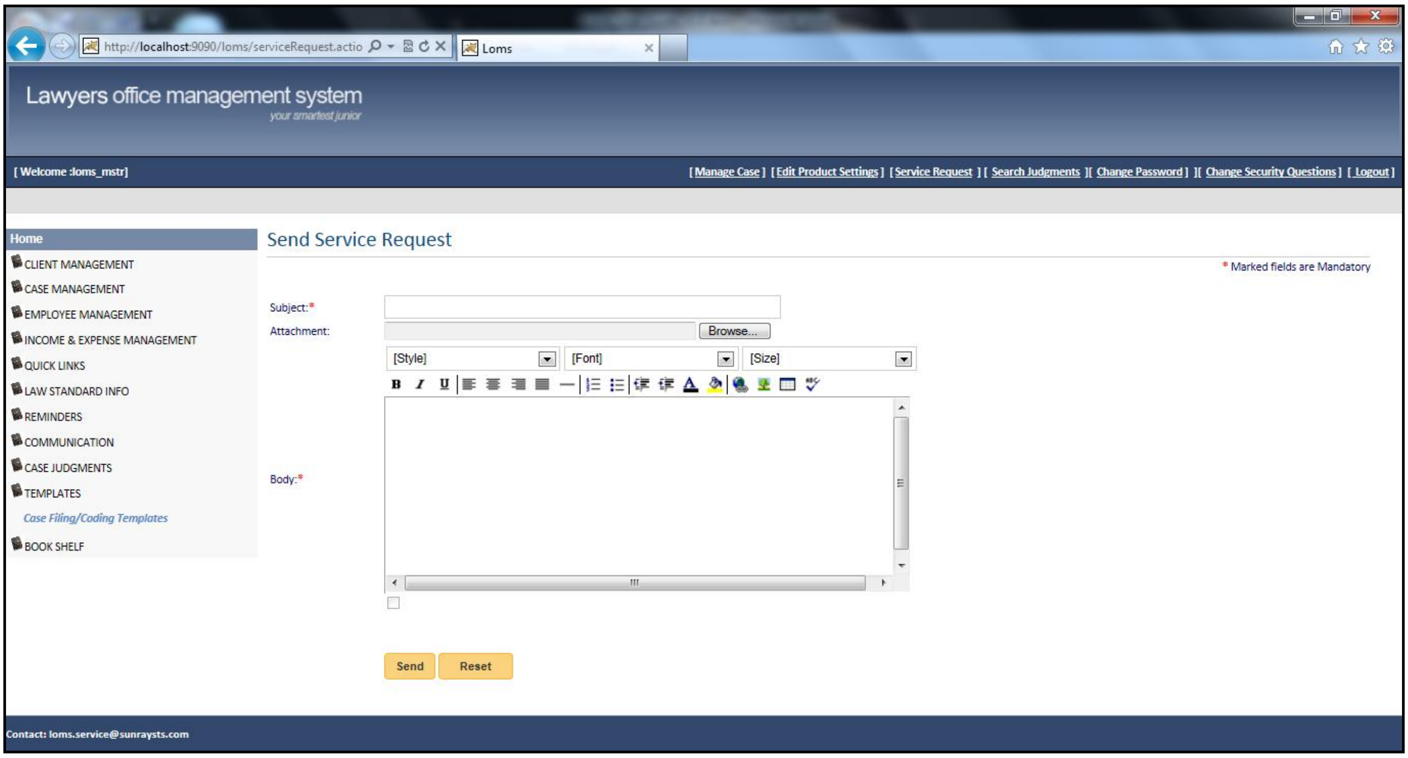
Step 2: Select the Book Information you wish to remove and click on the DELETE button. The application will show a pop up window with the message “Are you sure you want to delete the data?” as shown below. Click on OK if you wish to delete the record, else click CANCEL.



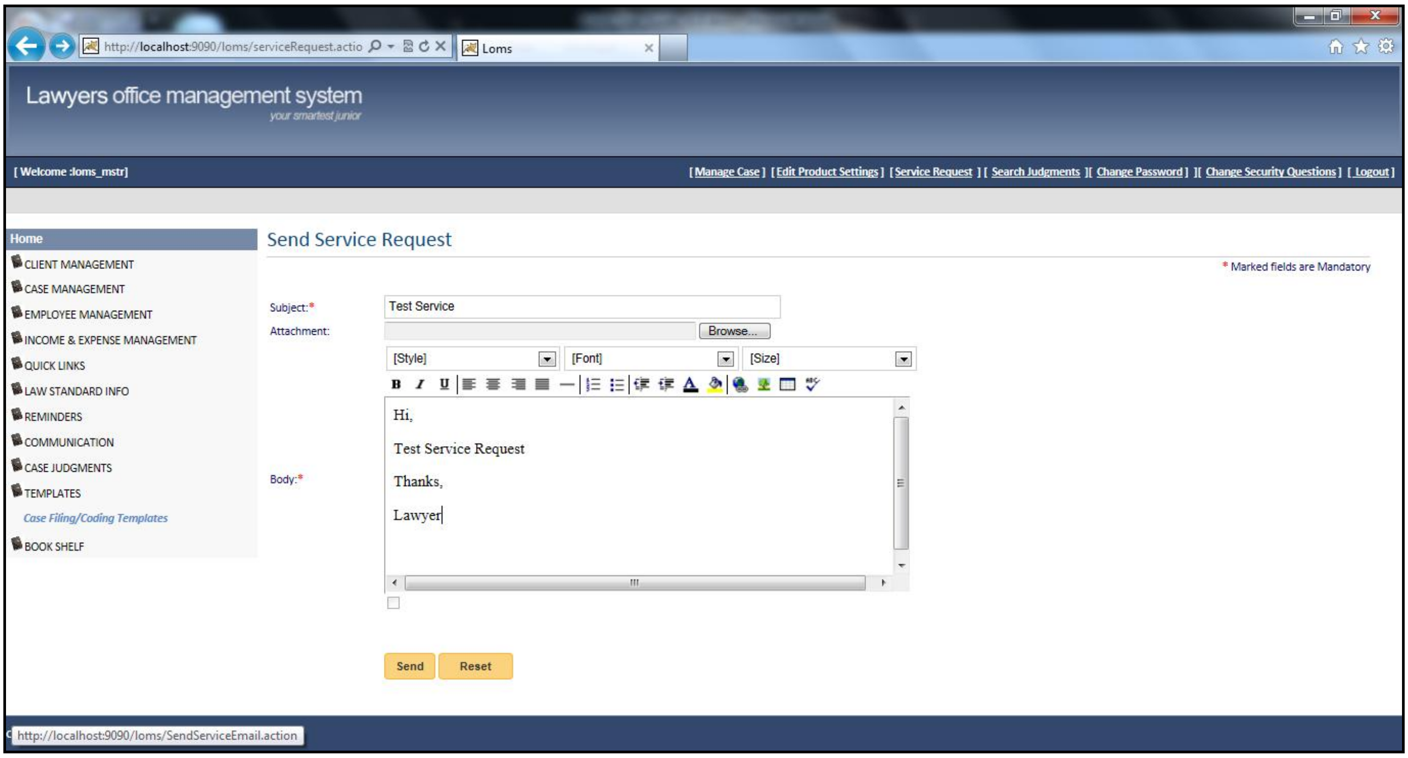
12. Others

12.1. Raise a Service Request

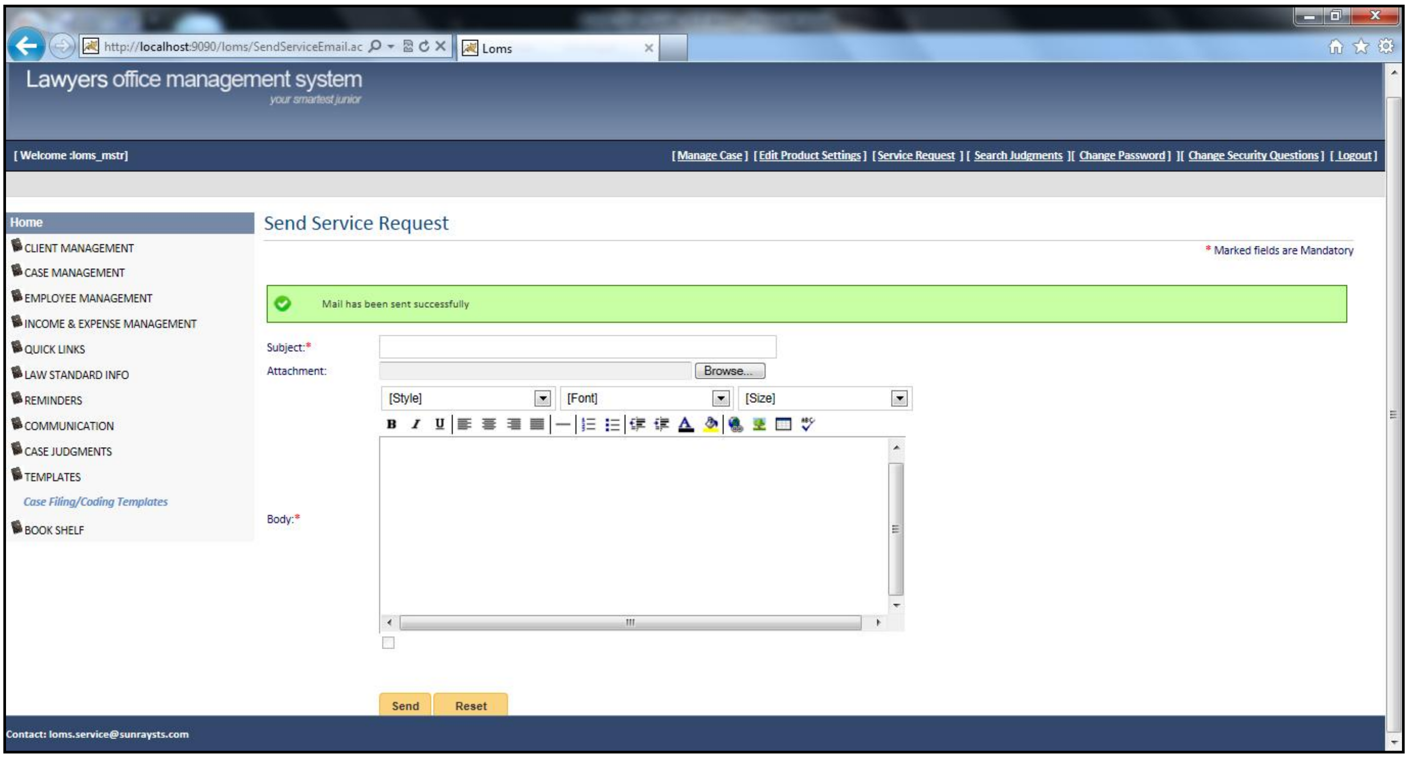
Step 1: Click on the link Service Request (Found in the Welcome Banner)



Step 2: Enter the details of the issue or service request and click on the SEND button as shown below,

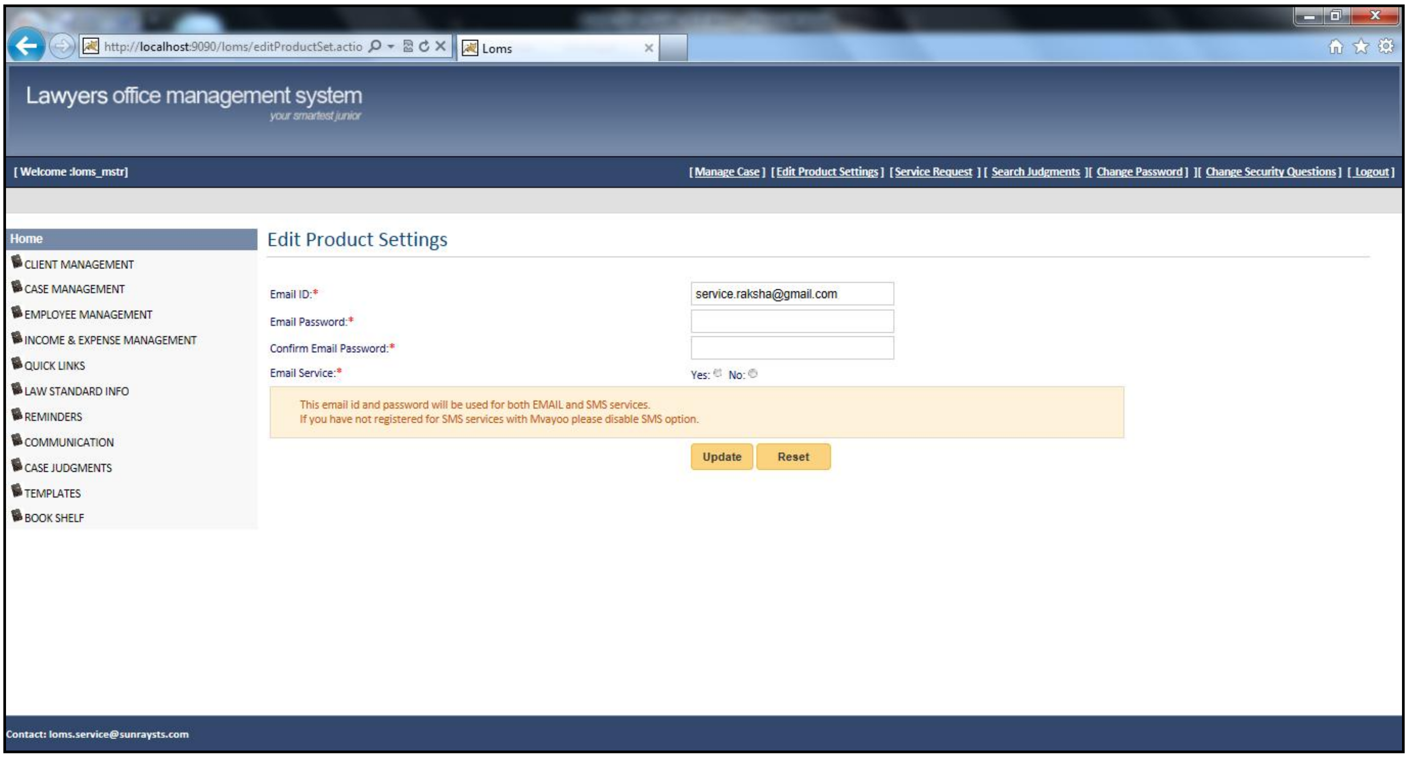


Step 3: Once the Service Request email has been sent, the application will give a success message as shown below,

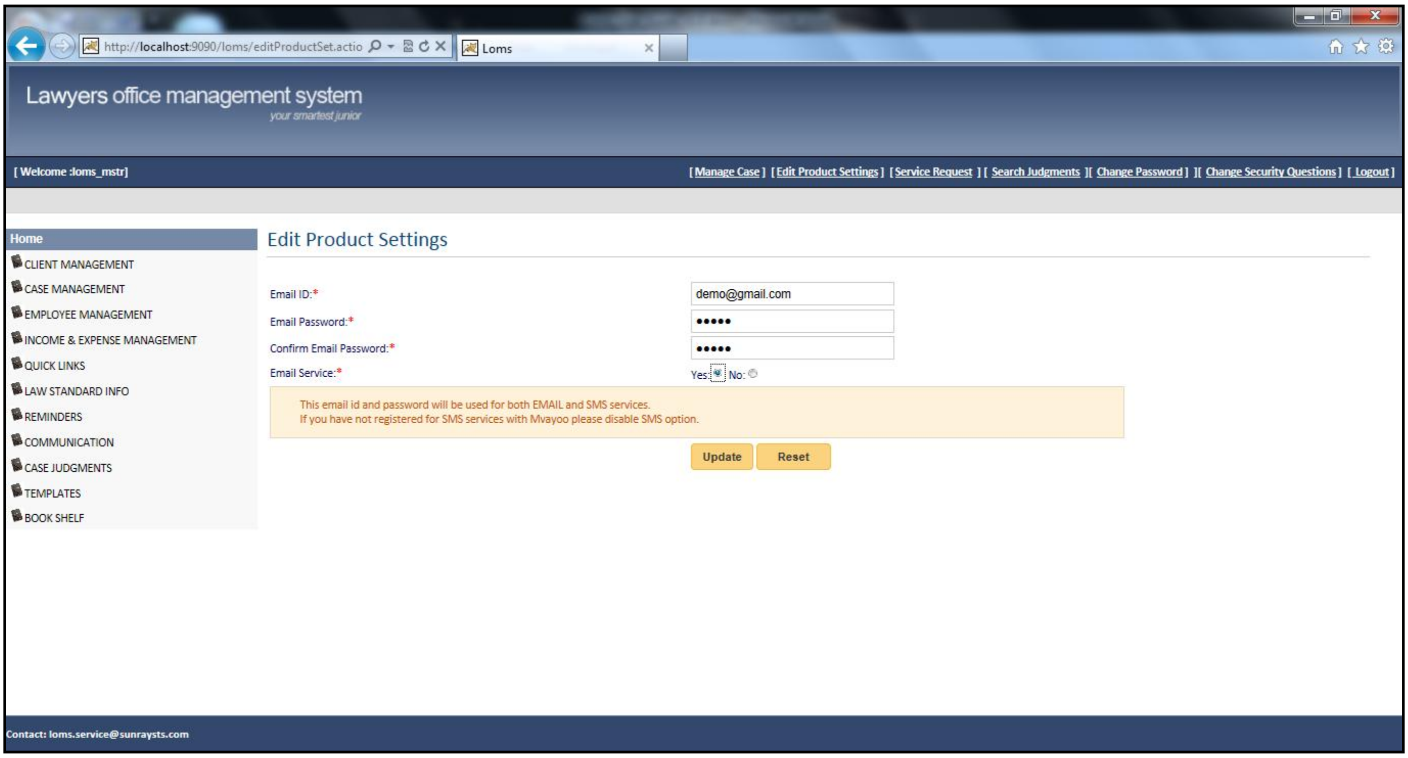


12.2. Edit Product Settings

Step 1: Click on the link Edit Product Settings (Found in the Welcome Banner) as shown below,



Step 2: The user can modify the Email ID, Email Password and enable / disable the Email services and click on the update button as shown below



Step 3: Once the data is saved in the database, the application will give a Success message as shown below,