Workflow Lawyer ERP

1 User Management

Admin: The Admin oversees the entire system, managing user roles, master data, and records with comprehensive permissions.

Staff: Staff members handle daily operations related to matter management, including case monitoring, data entry, and report generation. They adhere to predefined roles and permissions to execute specific tasks related to matter usage and performance.

Client: Clients can schedule appointments with lawyer staff and access detailed information about their assigned matters through the client portal. They can monitor the progress of their cases and receive updates regarding their legal matters in a user-friendly interface.

1.1 Login Screen

To log in, please use your email and password

Business Process	Sign-In Process
Description	This use case allows individuals as members on the platform, including potential investors and borrowers.
Actors	Potential Members, Administrator

Screen	Description
S-1	To log in, please use your email and password.
S-2	If you want to reset your password, please click on 'Forgot Password' to proceed to the next screen.
S-3	After entering your email, an OTP will be sent to your inbox. Enter the OTP, and you will be directed to the password change screen.
S-4	Here, you can enter your new password and confirm it. Once you submit, your password will be changed.

2 Contact Management(CRM)

2.1 Contact

2.1.1 Contact Type Creation

ID	Step	Details
CT_01	Navigate to Contact Type Creation Page	Access the "Contact Type" section to reach the Contact Type creation form.
CT-01	Select User	Automatically populate `created_by` with the logged-in user.
CT-03	Enter Details	Input `contract_type_name` to categorize the Contact type and an optional description.
CT-04	Save Contact Type	Submit the form to save the Contact Type in the database.

2.1.2 Contact Creation

ID	Step	Details
	Navigate to Contact Creation Page	Go to the "Create Contact " page and select Contract Type from the dropdown.
	Enter Contact Information	Input contact name, title, and contact number.
	Enter Organization Details	Specify organization name, turnover, and employee size.
	Select Location	Choose country, city, and state from dropdowns.
	Assign Relationships	Select sector, industry, and KnownRelationships fields.
	Set User Association	Automatically set `created_by` to the current user
	Save Contract	Submit the form to save the contract details in the database.

2.1.3. Manage Existing Contracts and Contract Types

ID	Step	Details
	View Records	Access management pages to view all contracts and contract types.
	Edit/Update Record	Open a contract or contract type, modify details, update `updated_by` field, and save changes.
	Delete Record	Select a contract or contract type for deletion if necessary.
	Confirm Success	Ensure a success message appears after each creation, update, or deletion action.

2.1.4 Contacts Management

ID	Step	Details
	Add Contact	Add contact with fields like contact type, supporting full CRUD
	Convert Contact Type	Convert a contact (e.g., from general to client or staff).

2.2 Events

2.2.1 Events

ID	Step	Details
	Create Event	Enter event details and save; requires admin approval post-creation.
	Admin Approval	Show approval button for admin users, hide for non-admins.
	Send Event Emails	Once approved, email participants directly.

2.2.2 Event Approval Workflow

ID	Step	Details
	Event List View	View events, click "Add Event" to access the add screen.
	Super User Approval	Only super user can approve events, updating status and redirecting to event list.

2.3 Proposals

2.3.1 proposals

ID	Step	Details
	Add Proposal	Enter proposal details and attach necessary files.
	Attach Template	Select a predefined or new template and preview it.
	Download or Send Proposal	Download as PDF or proceed to select contacts and send via email.

2.3.2 Proposal and Template Management

ID	Step	Details
	View Proposals	Access proposal records in a table format; click 'Add Proposal' to create a new one.
	View Templates	Access templates in a table format; click 'Add New' to create a new template with placeholders.
	Save Template Fields	Fill input fields and save template data.
	Template Details	Review template details, download as

	Review	PDF, or click "Next" to continue.
	Select Contact Type	Choose Contact Type, display related Contacts, and send proposal to selected clients.

2.3.3 Email Sending Confirmation

Id	Step	Details
	Email Sending Process	Display message indicating email is being processed and sent.