Lawyer ERP DMS

The Document Management System (DMS) concept has been fully implemented as requested by Andrew. The initial setup includes the following default entities:

• Library:

- o Internal: Departments such as IT, People, and Finance.
- o Practice: Categories including Application Forms and Letter Forms.

• Knowledge:

- o Internal: Departments such as IT, People, and Finance.
- Practice: Various practice areas, labelled as Practice Area 1 and Practice Area 2

matter workspace

When a matter workspace is created, a new client type is automatically generated, which leads to the creation of a corresponding EntityDocument. Likewise, when a client is created under a specific client type, a dedicated folder for that client is also automatically set up.

Workspace Full Workspace + Internal + Internal Purchase Order Form Asset Disposal Policy Accounting Policy Training Policy - ... dministration + Vendor Contracts + Purchases + Practice Application Forms + Letter form - Letter of Engagement Transaction Bibl Matter Workspace (Listing of All Client Matter Workspaces as per the structure defined during matter creation (Index Tabbed for Recent, Common, My Favorite, My Matter Workspace, Saved Searches etc ...) + Dispute Resolution + Real Estate + Family Law + Banking & Finance - Corporate v - Administration - Email - Advisory Documents - Transaction Documents Final Executed Documents

The attached screenshot illustrates the flow that Andrew requires.