**Firms API**

The below images represent the fields we are using to filter the firms.

Graphical user interface, text, application, chat or text message

Description automatically generated

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1. **Search**

After clicking on search. It hits the stored procedures( **[SP\_FirmSearchLimitedData] and [dbo].[SP\_FirmSearchLimitedDataCount])** and bind the data to that grid. Pagination also be placed in the UI. Based on pagination it will get the records.

1. **Add**

After clicking on add it will open another screen to add the data related to the firm.

Graphical user interface, text, application, table

Description automatically generated

After adding any data clicking on save firms data will be saved.

In notes tab we have general notes as well as reduction notes. If text box text changed here we are updating the notes in firms table.

**Firms View**

**a) Attorneys**

**i) Add Attorney**

After clicking on add attorney new empty row will be added. If we change any data

(In textbox text changed) in the row it will update the data in attorneys table.

**ii) Export To Excel**

It will export the records that are present in the grid. Which are related that firm.

**iii) Remove Attorney**

It will update the record in attorneys with removed=1 in database.

**iv) Attorney No Longer With Firm**

If we check the Nolongerwithfirm checkbox .It will update the record in attorneys with FirmNolongerNeeded=1 in database and we need to show red color border.

Graphical user interface, application, Word

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**b) Documents**

**i) Reload**

It will get the documents related to the firm. We can get the firm documents below query

select \* from firm\_note fn join

notes n on n.id=fn.noteid where

firmid in (firmIds) and notetype=**'attachment'**

After getting the firmnotes data.It assigns to ObservableCollection<IDocumentBase>.

**ii)Remove Documet**

After clicking on X link in the grid it will ask for the confirmation.if it is ok then it removes the record from the notes as well as firm\_note

**iii)Print selected documents**

Selected documents will be printed.

A screenshot of a computer

Description automatically generated

**View**

Once clicking on that button. It will show the document.

**FirmAnalysis**

After clicking on FirmAnalysis it is calling firmanalysis window.

Graphical user interface, application

Description automatically generated

**3)Right Click on Record**

Graphical user interface, text, application

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**Add To Teams**

If we want to assign team to the firm .We need to select both and click on Add To Firms. Data will be saved In Team\_Firm table

**Remove Team Firms**

If we want to remove team to the firm .We need to select both and click Remove Team Firms. Data will be removed In Team\_Firm table.

**Merge**

After clicking on merge new pop up window will be opened for selecting the destination file.

If you select firm and click on select button. All the information related source firms will be moved to destination firm. We are calling this procedure from database side ( **[dbo].[Sp\_FirmsMerge**]) and moving attachments from the application side code.

Graphical user interface, application, Word

Description automatically generated

**4)Remove Firm**

After clicking on **X** link in the gird. It validates the cases removed status to that firm.

If all cases are inactive then it shows confirmation popup else it shows warning