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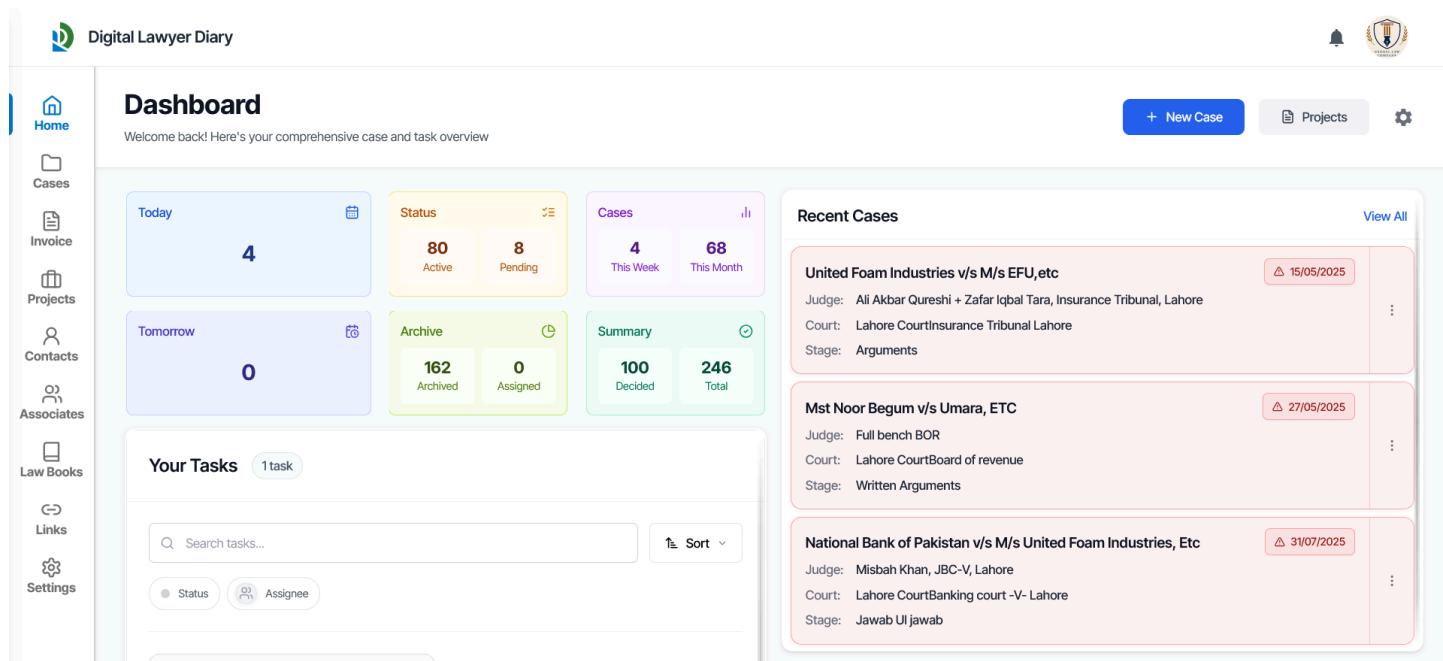
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Welcome to Your Digital Lawyer Diary Guide!

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.



The screenshot shows the Digital Lawyer Diary dashboard. On the left is a sidebar with icons for Home, Cases, Invoice, Projects, Contacts, Associates, Law Books, Links, and Settings. The main area has a title 'Dashboard' and a sub-header 'Welcome back! Here's your comprehensive case and task overview'. It includes several widgets: 'Today' (4 cases), 'Status' (80 Active, 8 Pending), 'Cases' (4 This Week, 68 This Month), 'Tomorrow' (0 cases), 'Archive' (162 Archived), 'Summary' (100 Decided, 246 Total), and 'Your Tasks' (1 task). To the right is a 'Recent Cases' section listing three cases with details like date, judge, court, and stage. Buttons for '+ New Case', 'Projects', and settings are also visible.

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.

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.



Dashboard

Welcome back! Here's your comprehensive case and task overview

+ New Case Projects

Today: 4

Status: 80 Active, 8 Pending

Cases: 4 This Week, 68 This Month

Tomorrow: 0

Archive: 162 Archived, 0 Assigned

Summary: 100 Decided, 246 Total

Your Tasks: 1 task

Search tasks... Sort

Status Assignee

Recent Cases

United Foam Industries v/s M/s EFU,etc

Judge: Ali Akbar Qureshi + Zafar Iqbal Tara, Insurance Tribunal, Lahore
Court: Lahore CourtInsurance Tribunal Lahore
Stage: Arguments

Mst Noor Begum v/s Umara, ETC

Judge: Full bench BOR
Court: Lahore CourtBoard of revenue
Stage: Written Arguments

National Bank of Pakistan v/s M/s United Foam Industries, Etc

Judge: Misbah Khan, JBC-V, Lahore
Court: Lahore CourtBanking court -V- Lahore
Stage: Jawab Ul jawab

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

Digital Lawyer Diary

Dashboard

Drag and resize widgets to customize your layout

+ Add Widget

• Customization Mode Active - Drag widgets to rearrange, resize by dragging corners, use "Add Widget" to add new ones

Today: 4

Status: 80 Active, 8 Pending

Cases: 4 This Week, 68 This Month

Tomorrow: 0

Archive: 162 Archived, 0 Assigned

Summary: 100 Decided, 246 Total

Your Tasks: 1 task

Search tasks... Sort

Status Assignee

Recent Cases

United Foam Industries v/s M/s EFU,etc

Judge: Ali Akbar Qureshi + Zafar Iqbal Tara, Insurance Tribunal, Lahore
Court: Lahore CourtInsurance Tribunal Lahore
Stage: Arguments

Mst Noor Begum v/s Umara, ETC

Judge: Full bench BOR
Court: Lahore CourtBoard of revenue
Stage: Written Arguments

National Bank of Pakistan v/s M/s United Foam Industries, Etc

Judge: Misbah Khan, JBC-V, Lahore
Court: Lahore CourtBanking court -V- Lahore

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.

Dashboard

Customization Mode

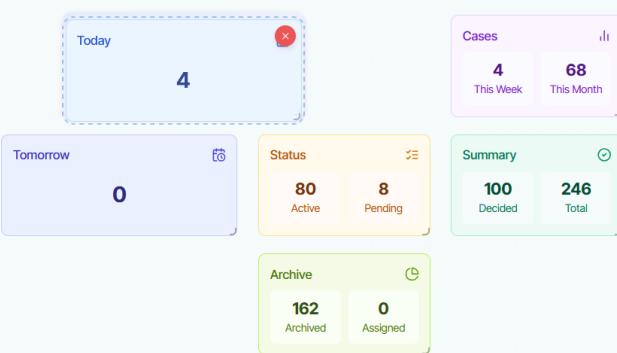
Drag and resize widgets to customize your layout

+ Add Widget

Done Customizing

- Customization Mode Active - Drag widgets to rearrange, resize by dragging corners, use "Add Widget" to add new ones

Reset to Default

**Recent Cases**

View All

United Foam Industries v/s M/s EFU,etc

Judge: Ali Akbar Qureshi + Zafar Iqbal Tara, Insurance Tribunal, Lahore
Court: Lahore CourtInsurance Tribunal Lahore
Stage: Arguments

Mst Noor Begum v/s Umara, ETC

Judge: Full bench BOR
Court: Lahore CourtBoard of revenue
Stage: Written Arguments

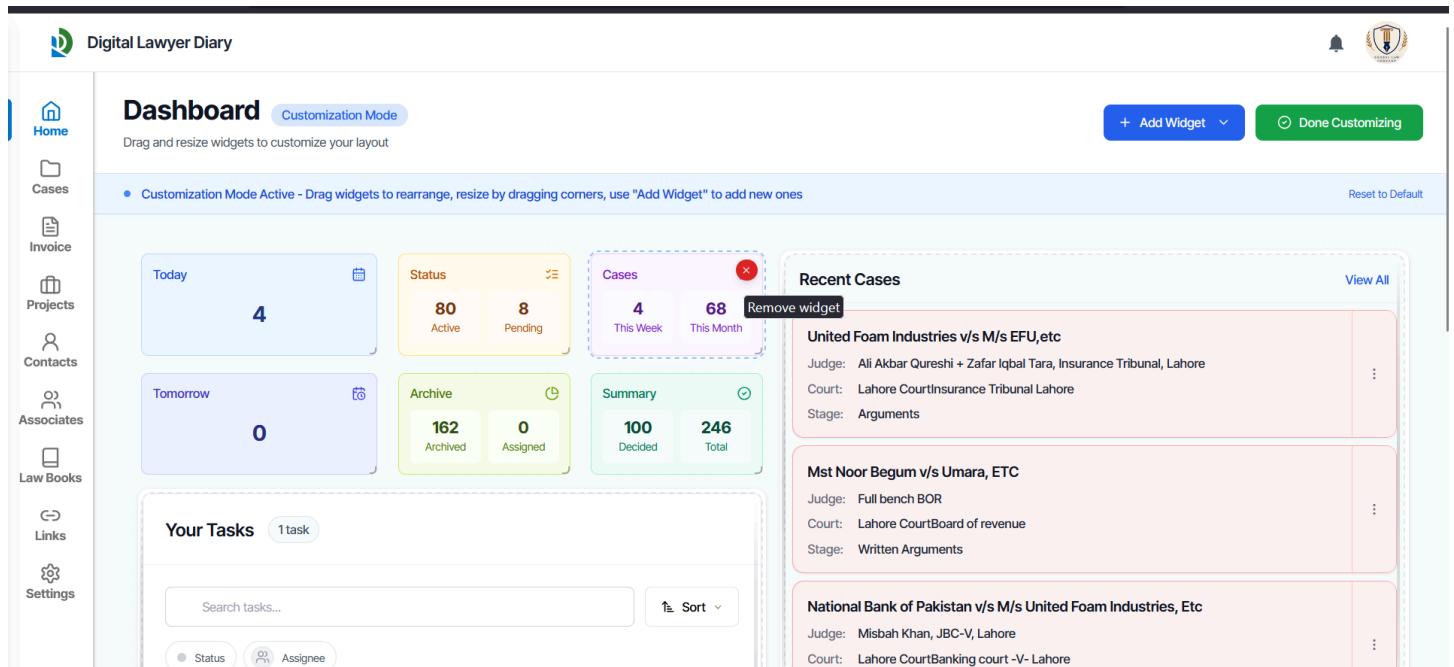
National Bank of Pakistan v/s M/s United Foam Industries, Etc

Judge: Misbah Khan, JBC-V, Lahore
Court: Lahore CourtBanking court -V- Lahore

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.



Today: 4
Cases: 4 This Week, 68 This Month (highlighted with a dashed border and a 'Remove widget' button)
Status: 80 Active, 8 Pending
Summary: 100 Decided, 246 Total
Tomorrow: 0
Archive: 162 Archived, 0 Assigned
Your Tasks: 1 task
Recent Cases: Recent cases listed as in the first screenshot

- **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.



Dashboard Customization Mode

Drag and resize widgets to customize your layout

• Customization Mode Active - Drag widgets to rearrange, resize by dragging corners, use "Add Widget" to add new ones

Reset to Default

Recent Cases View All

- United Foam Industries v/s M/s EFU,etc**
 - Judge: Ali Akbar Qureshi + Zafar Iqbal Tara, Insurance Tribunal, Lahore
 - Court: Lahore CourtInsurance Tribunal Lahore
 - Stage: Arguments
- Mst Noor Begum v/s Umara, ETC**
 - Judge: Full bench BOR
 - Court: Lahore CourtBoard of revenue
 - Stage: Written Arguments
- National Bank of Pakistan v/s M/s United Foam Industries, Etc**
 - Judge: Misbah Khan, JBC-V, Lahore
 - Court: Lahore CourtBanking court -V- Lahore

Today 4

Status 80 Active 8 Pending

Cases 4 This Week 68 This Month

Tomorrow 0

Archive 162 Archived 0 Assigned

Summary 100 Decided 246 Total

Your Tasks 1 task

Search tasks... Sort

Status Assignee

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.

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.

Dashboard

Welcome back! Here's your comprehensive case and task overview

Recent Cases View All

- United Foam Industries v/s M/s EFU,etc** 15/05/2025
 - Judge: Ali Akbar Qureshi + Zafar Iqbal Tara, Insurance Tribunal, Lahore
 - Court: Lahore CourtInsurance Tribunal Lahore
 - Stage: Arguments
- Mst Noor Begum v/s Umara, ETC** 27/05/2025
 - Judge: Full bench BOR
 - Court: Lahore CourtBoard of revenue
 - Stage: Written Arguments
- National Bank of Pakistan v/s M/s United Foam Industries, Etc** 31/07/2025
 - Judge: Misbah Khan, JBC-V, Lahore
 - Court: Lahore CourtBanking court -V- Lahore
 - Stage: Jawab Ul jawab

Today 5

Status 81 Active 9 Pending

Cases 5 This Week 69 This Month

Tomorrow 0

Archive 162 Archived 0 Assigned

Summary 100 Decided 247 Total

Your Tasks 1 task

Search tasks... Sort

Status Assignee

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

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.

Sr #	Court Case #	Case Type	Case Stage	Case Title	Court Name	Next Date
1		Suit For Recovery	Arguments	United Foam Industries v/s M/s EFU,etc	Insurance Tribunal Lahore	15/05/25
2			Written Arguments	Mst Noor Begum v/s Umara, ETC	Board of revenue	27/05/25
3		Banking law	Jawab Ul jawab	National Bank of Pakistan v/s M/s United Foam Industries, Etc	Banking court -V- Lahore	31/07/25
4	195113	Suit for Declaration	Notices	Habib Ullah Asim Vs Mumtaz Begum etc	Civil Court Model Town, Lahore	02/10/25
5	117515	Recovery Suit	For evidence of plaintiff	Huma Nisar Vs Tariq Shafqat, etc	Civil Court, Lahore	04/10/25
6	269681423	Suit for Declaration & Declaration	اللئاظر حکم، عدالت حکم دیگر ای	Huma Nisar Vs Raja Qaiser etc	Civil Court, Lahore	04/10/25
7	123	Administrative Law	Arguments on Application	1234	Abd	04/10/25

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									

04-10-25

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	

- 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."

Cases

+ Create Case Custom Fields

Search Cases Filter by Sort By Print Customize

Today Back Next October 2025 Month Week Day Agenda

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	01	02	03 1234	04
05	06	07	08 Imdad Ahmad Awan v/s M... Salma Afzal Vs Ch. Muha...	09	10 Askari Bank Limited VS M... +2 more	11 Raja Qasir vs Huma Nisar ...
12 Haji Muhammad Sharif Vs... +3 more	13 Nosheen Rauf VS Tahira Y... +4 more	14 Hassan Bashir v/s Public a...	15 Farah Deeba Vs Rubina Y... +3 more	16	17 Mst Sanam yaseen vs Ali ... +7 more	18 Rehan Malik Vs Abdullah ...
19 Muhammad Zubair etc Vs... Ahmad Ali Vs Muhammad...	20 Nadeem ahmar vs DHA etc +5 more	21 Tahira younas vs public at...	22 Huma Nisar Vs Tariq Shaf...	23 Huma Nisar Vs Raja Qaise...	24 Munaza Hameed Vs Uma... Raja Mobeen Akhtar v/s U...	25 Muhammad Aqeel Vs Mu...
26 Malik Liaqat Iqbal Vs Sada... +2 more	27 Manzoor Ahmad Vs Khalil...	28 Afzana Bibi vs Hafiz Ul As...	29 Malik Sadaqat Vs Malik Li...	30 Asad Ali Vs Pak Suzuki M... +2 more	31	01

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.

Cases

+ Create Case Custom Fields

Search Cases Filter by Sort By Print Customize

Sr #	Court Case #	Case Type	Case Stage	Case Title	Court Name	Next Date
1		Suit For Recovery	Arguments	United Foam Industries v/s M/s EFU,etc	Insurance Tribunal Lahore	15/05/25
2			Written Arguments	Mst Noor Begum v/s Umara, ETC	Board of revenue	27/05/25
3		Banking law	Jawab Ul jawab	National Bank of Pakistan v/s M/s United Foam Industries, Etc	Banking court -V- Lahore	31/07/25
4	195113	Suit for Declaration	Notices	Habib Ullah Asim Vs Mumtaz Begum etc	Civil Court Model Town, Lahore	02/10/25
5	117515	Recovery Suit	For evidence of plaintiff	Huma Nisar Vs Tariq Shafqat, etc	Civil Court, Lahore	04/10/25
6	269681423	Suit for Declaration & Declaration	اللقطار حکم عالی حکم دیگر ای	Huma Nisar Vs Raja Qaiser etc	Civil Court, Lahore	04/10/25
7	123	Administrative Law	Arguments on Application	1234	Abd	04/10/25

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



Home



Cases



Invoice



Projects



Contacts



Associates



Law Books



Links



Settings

Create Case

Customize

1. Case Details

Office File Number

e.g., 12345-A

Court Case Number

e.g., 6789

Case Title

e.g., John Doe v. Jane Doe

Case Type

Type to search or create new entry

Case Stage

Type to search or create new entry

Court Name

e.g., Supreme Court

Judge Name

Type to search or create new entry

City

Type to search or create new entry

Counsel For

e.g., Plaintiff

Next Date

Pick a date

Notes

e.g., Important notes

Custom Fields

No custom fields added

 Add Custom Field

Attachments



Drag and drop files, or click to select

Used: 310 KB / 50 MB (49.7 MB available)

2. Contact Information

3. Additional Information

4. Hidden Fields

 Create Case

- 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.

Edit Case

[← Back](#)

1. Case Details

2. Contact Information

Client Name

Opponent Name

Opponent Lawyer

3. Additional Information

4. Hidden Fields

[Save](#)

- 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

-  Home
-  Cases
-  Invoice
-  Projects
-  Contacts
-  Associates
-  Law Books
-  Links
-  Settings

Notes

Custom Fields

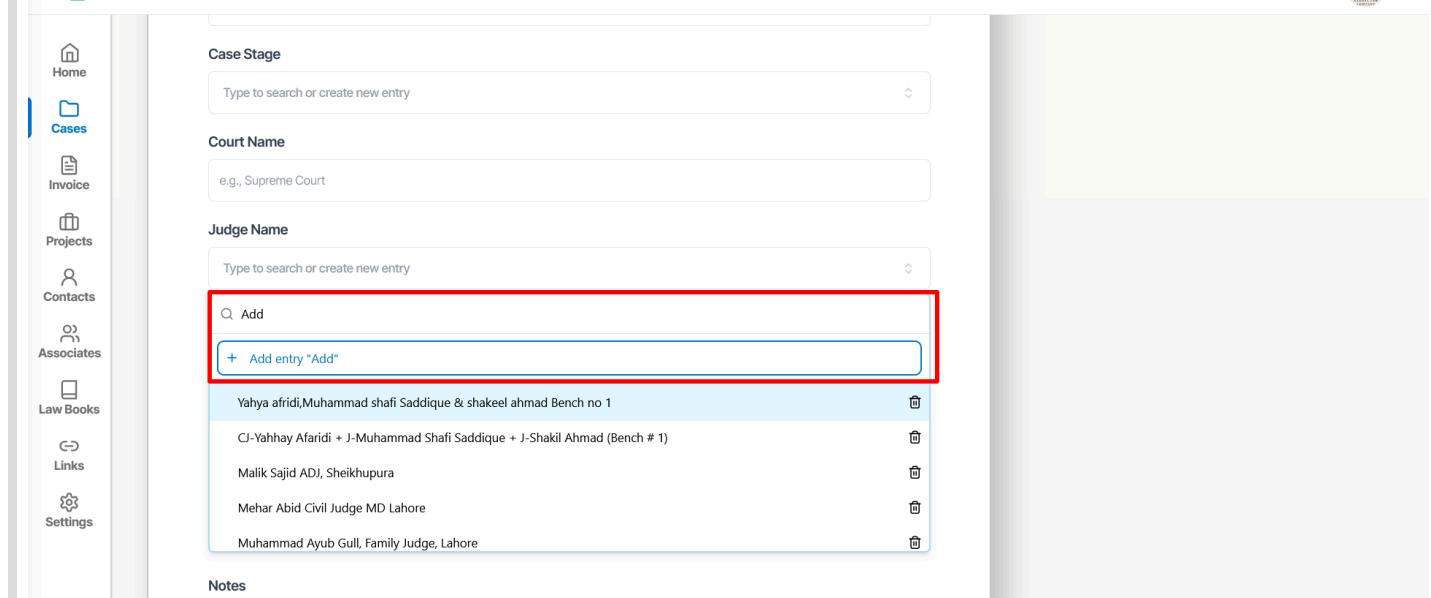
No custom fields added

[+ Add Custom Field](#)

Attachments

Upload
 Drag and drop files, or click to select
Loading storage usage...

 **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!



Case Stage
Type to search or create new entry

Court Name
e.g., Supreme Court

Judge Name
Type to search or create new entry

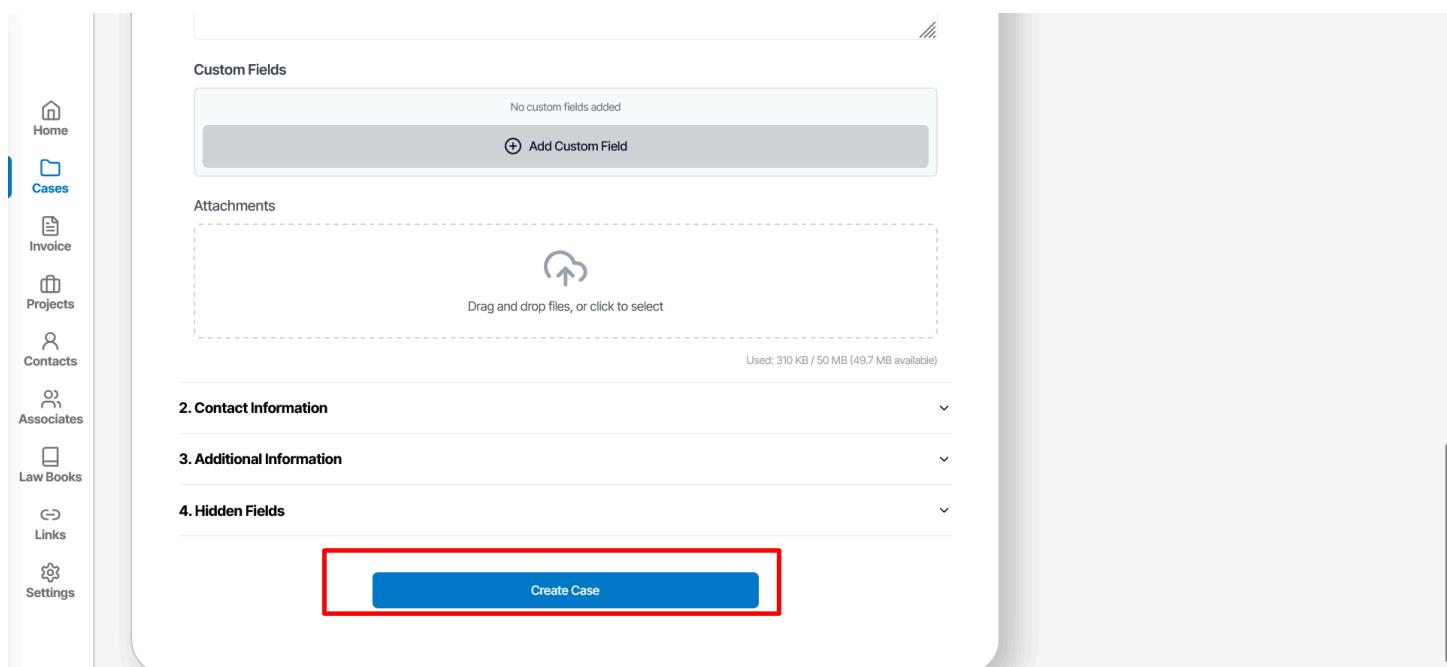
Add

+ Add entry "Add"

- Yahya afridi,Muhammad shafi Saddique & shakeel ahmad Bench no 1
- CJ-Yahay Afaridi + J-Muhammad Shafi Saddique + J-Shakil Ahmad (Bench # 1)
- Malik Sajid ADJ, Sheikhupura
- Mehar Abid Civil Judge MD Lahore
- Muhammad Ayub Gull, Family Judge, Lahore

Notes

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.



Custom Fields
No custom fields added
+ Add Custom Field

Attachments
Drag and drop files, or click to select
Used: 310 KB / 50 MB (49.7 MB available)

2. Contact Information

3. Additional Information

4. Hidden Fields

Create Case

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.

The screenshot shows a software interface for managing cases. On the left, there's a vertical sidebar with icons for Home, Cases (which is selected), Invoice, Projects, Contacts, Associates, Law Books, Links, and Settings. The main area has sections for 'Next Date' (with a 'Pick a date' input field), 'Notes' (with a placeholder 'e.g., Important notes'), and 'Custom Fields'. The 'Custom Fields' section contains a button '+ Add Custom Field'. Below it is an 'Attachments' section with a file upload area and a note about available storage. At the bottom, there are two expandable sections: '2. Contact Information' and '3. Additional Information'.

A modal window titled 'Add Custom Field' is displayed. It contains fields for 'Field Name' (with a placeholder 'Enter field name'), 'Field Type' (set to 'Text'), and 'Scope' (with radio buttons for 'This case' (selected) and 'All cases'). A large blue 'Add Field' button is at the bottom.

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.

Case View

United Foam Industries v/s M/s EFU,etc
Judge: Ali Akbar Qureshi + Zafar Iqbal Tara, Insurance Tribunal, Lahore
Stage: Arguments
Next date: 15/05/2025 

Case Details		Contact Information	Additional Information
Office File No.	05/Insurance Tribunal		
Court Case No.	-		
Case Type	Suit For Recovery		
Hearing Dates	15/05/2025		
Previous Date	26/03/2025		
Counsel For	Plaintiff		

Managing Hearing Dates

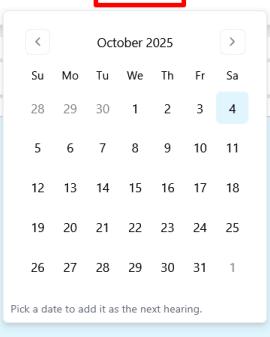
Keeping track of hearing dates is critical. Your Digital Diary makes this effortless.

- 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.

Case View

United Foam Industries v/s M/s EFU,etc
Judge: Ali Akbar Qureshi + Zafar Iqbal Tara, Insurance Tribunal, Lahore
Stage: Arguments
Next date: 15/05/2025 



Pick a date to add it as the next hearing.

Contact Information		Additional Information
Office File No.	05/Insurance Tribunal	
Court Case No.	-	
Case Type	Suit For Recovery	
Hearing Dates	15/05/2025	
Previous Date	26/03/2025	
Counsel For	Plaintiff	

Hearing Dates	15/05/2025
	26/03/2025
	20/02/2025
	28/01/2025
	16/12/2024
	09/12/2024
	26/11/2024
	02/10/2024
	24/07/2024
	25/06/2024
	13/03/2024

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.

The screenshot shows the Digital Lawyer Diary software interface. On the left is a sidebar with icons for Home, Cases (selected), Invoice, Projects, Contacts, Associates, Law Books, Links, and Settings. The main area is titled 'Case View' and shows a case summary for 'United Foam Industries v/s M/s EFU,etc'. The summary includes the judge (Ali Akbar Qureshi + Zafar Iqbal Tara, Insurance Tribunal, Lahore), stage (Arguments), next date (15/05/2025), and a 'Quick add' button. Below this is a table with tabs for Case Details, Contact Information, and Additional Information. The Case Details tab shows fields like Office File No. (05/Insurance Tribunal), Court Case No. (blank), Case Type (Suit For Recovery), and Hearing Dates (15/05/2025, 26/03/2025, 20/02/2025, 28/01/2025). The top navigation bar has buttons for Copy, Delete, History, Privacy, Assign, and Export, with the 'Assign' button highlighted by a red box.

- 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.



Case View

United Foam Industries v/ Plaintiff

Judge: Ali Akbar Qureshi + Zafar Iqbal

Stage: Arguments

Next date: 15/05/2025

Copy Delete History Privacy Assign Export

Case History

25/05/2024, 2:16:57 pm
0 Changes

03/06/2024, 11:11:34 am
2 Changes

03/06/2024, 11:11:46 am
0 Changes

23/07/2024 10:38:55 pm

Edit Active Additional Information

Hearing Dates	15/05/2025
26/03/2025	
20/02/2025	
28/01/2025	

Case View

United Foam Industries v/ Plaintiff

Judge: Ali Akbar Qureshi + Zafar Iqbal

Stage: Arguments

Next date: 15/05/2025

Copy Delete History Privacy Assign Export

Case History

25/05/2024, 2:16:57 pm
0 Changes

03/06/2024, 11:11:34 am
2 Changes

03/06/2024, 11:11:46 am
0 Changes

23/07/2024 10:38:55 pm

Edit Active Additional Information

Hearing Dates	15/05/2025
26/03/2025	
20/02/2025	
28/01/2025	

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.



Invoices

Total Invoices **0** All time

Total Revenue **Rs 0.00** Rs 0.00 collected

Outstanding **Rs 0.00** 0 unpaid

Paid Invoices **0** Rs 0.00 received

Search 6 invoices... Filter

Invoice ID ↑↓	Client Name	Issue Date ↑↓	Due Date ↑↓	Amount ↑↓	Status ↑↓
INV-2025-003	Irtaza Shah	Oct 11, 2025	Nov 10, 2025	Rs 4,200.00	partial
INV-2025-002	Irtaza Shah	Jun 6, 2025	Jul 6, 2025	Rs 2,000.00	draft
INV-2025-001	Irtaza Shah	Jun 6, 2025	Jul 6, 2025	Rs 400.00	draft
INV-2025-696	Irtaza Shah	Jun 6, 2025	Jul 6, 2025	Rs 3,600.00	draft
INV-2025-363	Tariq Javed	May 1, 2025	May 31, 2025	Rs 14,000.00	paid
INV-2025-702	Muzamil	Apr 29, 2025	May 29, 2025	Rs 400.00	paid

- **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.

Settings

- General
- Language
- Invoices**

Invoice Settings
Customize your invoice settings here

Logo



Currency

Rs (PKR)

Sample amount: Rs 1,234.56

Template

Classic

Modern

Detailed

Invoice Numbering

Automatic Numbering
Automatically generate sequential invoice numbers

Invoice Prefix
INV

This will appear before the year and number (e.g., INV-2025-001)

Next Invoice Number
4

The next invoice will be: INV-2025-004

Save Changes

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.



Home

Cases

Invoice

Projects

Contacts

Associates

Law Books

Links

Settings

Create Invoice

Client/Paralegal *

Select a contact...

Invoice Number *

INV-2025-004

Associated Case (Optional)

Select a case to associate with this invoice

Case Reference (Optional)

Enter case reference

Case Matter Type (Optional)

Enter case matter type

Items *

Product Name	Quantity	Rate	Tax	Amount	Actions
+ Type to search or create new entry	- 1 +	0	0 %	Rs 0.00	✓
Total:					Rs 0.00

Subtotal: Rs 0.00

Discount Type Percentage (%) **Discount (%)** 0

Tax: Rs 0.00

Total: Rs 0.00

Notes

Add notes or payment instructions...

Create Invoice

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.

Select a case to associate with this invoice

Case Reference (Optional)
Enter case reference

Case Matter Type (Optional)
Enter case matter type

Items *

Product Name	Quantity	Rate	Tax	Amount	Actions
Legal services	1	Rs 4,000.00	0%	Rs 4,000.00	
Stamp duty	1	Rs 2,000.00	0%	Rs 2,000.00	
+ Legal services	- 1 + 4000	0 %	Rs 4,000.00		
Total:					Rs 6,000.00

Subtotal: Rs 6,000.00

Discount Type Discount (%)

Select a case to associate with this invoice

Case Reference (Optional)
Enter case reference

Case Matter Type (Optional)
Enter case matter type

Items *

Product Name	Quantity	Rate	Tax	Amount	Actions
Legal services	1	Rs 4,000.00	0%	Rs 4,000.00	
Stamp duty	1	Rs 2,000.00	0%	Rs 2,000.00	
+ Type to search or create new entry	- 1 + 0	0 %	Rs 0.00		
Total:					Rs 6,000.00

Subtotal: Rs 6,000.00

Discount Type Discount (%)

- 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).



Invoice

[←](#) [Print](#) [Duplicate](#) [Edit](#) [Delete](#)

Amount Due: Rs 500.00

Due Date: July 6, 2025 (Overdue)

[Make Payment](#)

Payment History

Date	Method	Reference	Amount
October 11, 2025	Cash	-	Rs 1,500.00
Total Paid:			Rs 1,500.00

#INV-2025-002

Client
Irtaza Shah
Case Reference
Not specified

Invoice Date
June 6, 2025
Due Date
July 6, 2025 (Overdue)

Subtotal:	Rs 2,000.00
0	
Total:	Rs 2,000.00
Total Paid:	Rs 1,500.00
Amount Due:	Rs 500.00

Invoice Items

Product Name	Quantity	Price	Tax %	Amount
Legal services	5	Rs 400.00	0%	Rs 2,000.00
				Subtotal: Rs 2,000.00
0				Total: Rs 2,000.00

Created: June 6, 2025

Last Updated: October 4, 2025

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

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

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:

Associates
8 associates found

+ Invite Associate

Filter Sort

- Abdullah Zahid (Developer, 3 cases)
- Muhammad Nouman (Lawyer, 0 cases)
- Shafay (Assistant, 1 case)
- United Foam Industries Pvt Ltd (Advocate, 9 cases)

Home
Cases
Invoice
Projects
Contacts
Associates
Law Books
Links
Settings

- 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.

Digital Lawyer Diary

Associates
8 associates found

+ Invite Associate

Filter Sort

Active Team Members

Pending Invitations You Sent

I226937 Pending

Email: [REDACTED]
Role: Lahore
Sent: 11/10/2025

Resend Cancel Send Invitation

What happens next?
The invitee will receive an email with instructions to join your firm. They'll appear as 'Pending' until they accept the invitation.

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.

The screenshot shows the 'Associates' section of the Digital Lawyer Diary interface. On the left sidebar, the 'Associates' option is selected. In the main area, there's a heading 'Associates' with a note '8 associates found'. Below it is a search bar with placeholder 'Search lawyers...'. To the right are 'Filter' and 'Sort' buttons. A blue button at the top right says '+ Invite Associate'. Under 'Active Team Members', four team members are listed with their names, roles, and case counts. Below this is a section titled 'Pending Invitations You Sent' with a note 'Keep track of invitations that are awaiting a response. You can resend or cancel them anytime.' A single pending invitation card is shown, labeled 'I226937 Pending'. It contains the invitee's email ('Email:'), role ('Role: Lahore'), and send date ('Sent: 11/10/2025'). It includes two buttons: 'Resend' (orange) and 'Cancel Invitation' (red).

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.

The screenshot shows the 'Associates' section of the Digital Lawyer Diary interface. The 'Associates' heading has a note '1 associate found'. Below it is a search bar with placeholder 'Search lawyers...'. To the right are 'Filter' and 'Sort' buttons. A blue button at the top right says '+ Invite Associate'. Under 'Pending Invitations', a single invitation card is shown for 'Global Law Company'. It includes the company name ('Global Law Company'), the inviter ('Invited by Global Law Company'), the role ('Role: Lahore'), and the date ('Date: 11/10/2025'). It features two buttons: 'Accept' (green) and 'Decline' (red). Below the invitation card, a large plus sign icon is centered. At the bottom, a note says 'No Associates Found' with the sub-note 'Get started by inviting associates to join your law 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.

The screenshot shows the 'Associates' section of the Digital Lawyer Diary. On the left is a sidebar with icons for Home, Cases, Invoice, Projects, Contacts, Associates (which is selected), Law Books, Links, and Settings. The main area has a title 'Associates' and a subtitle '8 associates found'. It includes a search bar, filter, and sort buttons. Below is a grid of cards for each associate:

- Abdullah Zahid (Developer, 3 cases)
- Mian Abdullah BSCS 2022 FAST NU ... (lawyer, 0 cases)
- Muhammad Nouman (lawyer, 1 case)
- Shafay (Assistant, 1 case)
- United Foam Industries Pvt Ltd (Advocate, 9 cases)

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.

This screenshot shows the same 'Associates' page as above, but with a context menu open over the card for Mian Abdullah BSCS 2022 FAST NU ... (lawyer, 7 cases). The menu options are:

- Assign Cases (highlighted with a blue background)
- View Assigned Cases
- Change Role
- Remove from Firm

Assign Cases



Select cases to assign to Mian Abdullah BSCS 2022 FAST NU LHR (lawyer). Selected cases will be accessible to this team member for collaboration.

 Search cases...

Select All

Clear All

Available Cases

177 cases



Huma Nisar Vs Tariq Shafqat, etc

Court: Civil Court, Lahore • Type: Recovery Suit

Active



Hassan Bashir v/s Public at Large etc

Court: Civil Court, Lahore • Type: Suit for Declaration

Active



Malik Liaqat Iqbal Vs Sadaqat Iqbal Malik

Court: Civil Court, Lahore • Type: Civil Law • Client/Pa...

Active



Nosheen Rauf VS Tahira Younas etc

Court: Civil Court, Lahore • Type: Suit for possession

Active



[Cancel](#)

[Select Cases to Assign](#)

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.



New Project

Project Details

Project Name *

Description Edit Preview

This is a demo project

Team Members

Search team members...

Available Team Members

	Global Law Company Lahore	<input type="checkbox"/>
--	------------------------------	--------------------------

Select All Clear All

Case Reference

Link to Case (optional)

Select Case... ▼

No cases available

Cancel
Create Project

- **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.

Projects

1 project found

Search projects...

My Lawfirm Project Active

This is demo Project

0/1 tasks 1 Pending 0 Blocked

1 members

PROGRESS 0%

Settings
Create Project
Filter ▾
Sort ▾

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**".

The screenshot shows the 'New Task' creation interface. On the left is a vertical sidebar with icons for Home, Cases, Invoice, Projects (selected), Contacts, Associates, Law Books, Links, and Settings. The main area has a header '← New Task' and a 'Project: Test' dropdown. The 'Task Information' section contains fields for 'Title' (with placeholder 'This is a task') and 'Description (Optional)' (with placeholder 'This is my task'). Below these are dropdowns for 'Stage' (set to 'Review') and 'Status' (set to 'Pending'), and a 'Due Date (Optional)' button. The 'Milestones' section has a placeholder 'This is a milestone'. The 'Attachments' section shows a note 'No files attached' and a '+ Add Files' button. The 'Team Assignment' section includes a search bar for 'Assign To (Optional)' and a list of 'Available Team Members' with one entry: 'Muhammad Nouman lawyer'. At the bottom are 'Cancel' and '+ Create Task' buttons.

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.

The screenshot shows the Digital Lawyer Diary interface. On the left, a sidebar lists navigation options: Home, Cases, Invoice, Projects (selected), Contacts, Associates, Law Books, Links, and Settings. The main area displays a "My Lawfirm Project" dashboard. It includes a "Project Status" section (Active), a "Total Tasks" summary (1 task), and status breakdowns for PENDING (1), COMPLETED (0), and BLOCKED (0). A "Last Updated" section shows "October 15, 2025". Below these are "Link to Case" and "Select Case..." dropdowns. The right side shows a "Tasks" section with 1 task, search filters (Status, Assignee), and a "Kanban" button highlighted with a red box. A detailed task card for "Strategy Planning" is shown, including its description, due date (Oct 18), milestones (0/1), and assignee (Global Law Company).

This screenshot shows the same Digital Lawyer Diary interface, but the "Kanban" button in the top right of the tasks section is now highlighted with a red box. The tasks are grouped by stage: Intake & Assessment (0 tasks), Strategy Planning (1 task), Documentation & Filing (0 tasks), and Hearings & Negotiations (0 tasks). Each group has a summary card with a "Group by" filter dropdown highlighted with a red box.

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.

The screenshot shows a project management application with a sidebar on the left containing icons for Home, Cases, Invoice, Projects (selected), Contacts, Associates, Law Books, Links, and Settings. The main area displays three stages: Intake & Assessment (0 tasks), Strategy Planning (1 task, titled 'This is a Task'), and Documentation & Filing (0 tasks). A central window is titled 'Edit Project Stages' and shows a list of stages: Team Members (1 member) and Global Law Company (Lahore). Below the list are buttons for '+ Add Members' and 'Edit Stages'. The 'Edit Stages' button is highlighted with a red box and a yellow border.

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**".



Edit Project Stages

Changes apply only to this project. The first stage in the list becomes the default column on the Kanban board.

Task Status Configuration



Drag and drop to reorder status options. Changes apply to all task status dropdowns.

Renaming or reordering stages refreshes the workflow on the next load. Removed stages will move their tasks to the default stage when the board reloads.

Cancel

Save Stages

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.

The screenshot displays the mobile dashboard of the Digital Lawyer Diary application. At the top, there are four summary boxes: 'Today Cases' (4), 'Tomorrow Cases' (8), 'This Week' (21), and 'This Month' (50). Below these are three more boxes: 'Active' (68), 'Pending' (19), 'Archived' (164), 'Assigned' (0), 'Decided' (101), and a total of 247 cases. The main section, 'Recent Cases', lists five entries with details like judge, court, stage, and due date. The 'Your Tasks' section shows two tasks: 'CTC of case' (assigned to Muhammad Nouman, due Oct 4) and 'Call to customer' (unassigned, due Oct 1). The 'Task Analysis' section includes a status breakdown (Overdue: 1, Due Today: 0, Due This Week: 0) and a pie chart showing task distribution between In Progress (50%) and Completed (50%).

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

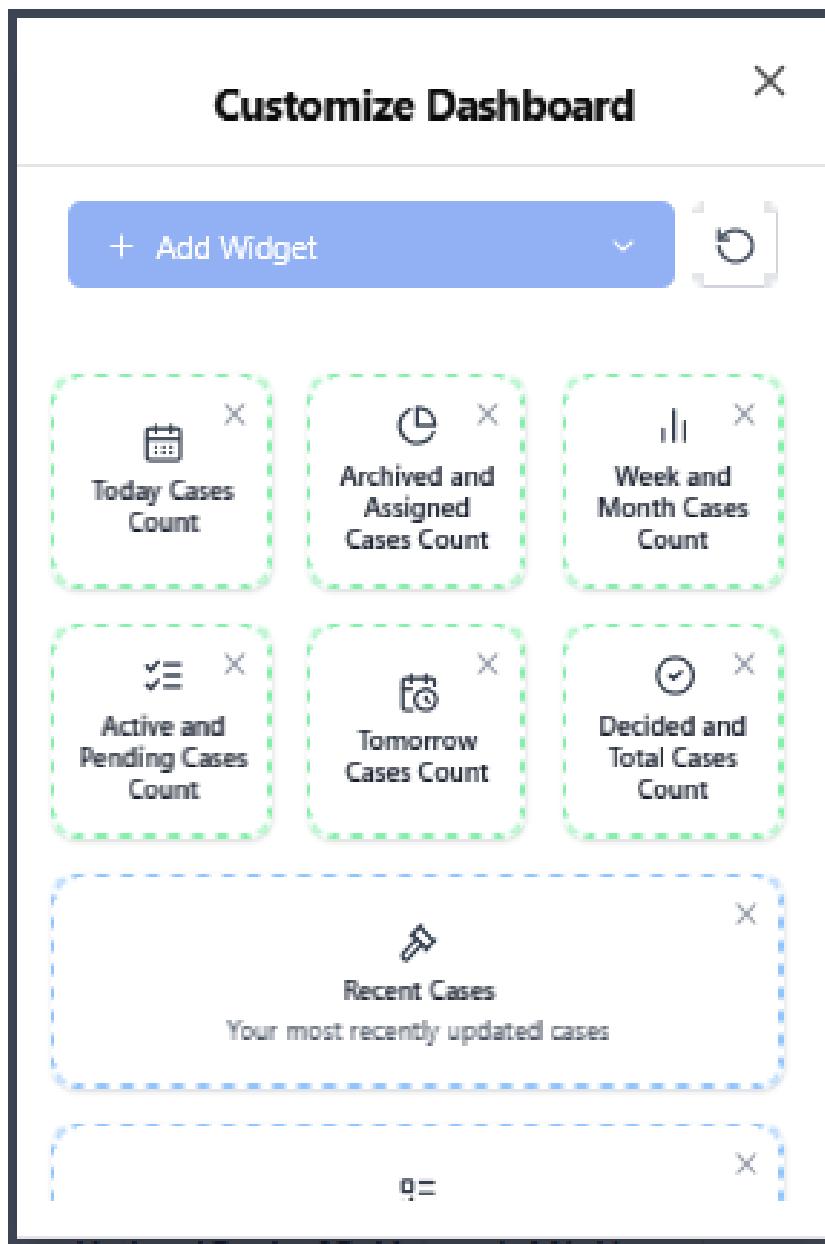
To begin personalizing your layout, click the **gear icon** (⚙️) located at the top right of the dashboard.

The screenshot shows the Digital Lawyer Diary dashboard in customization mode. At the top right, there is a gear icon (⚙️) which is highlighted with a red box. The dashboard features several widgets and sections:

- Top Bar:** Includes the Digital Lawyer Diary logo, a bell icon, and a shield logo for "GLOBAL LAW COMPANY".
- Dashboard Section:** A large section titled "Dashboard" with the subtext "Welcome back! Here's your case overview". It contains four cards:
 - Today Cases:** 4 Today Cases
 - Tomorrow Cases:** 8 Tomorrow Cases
 - This Week / This Month:** 21 This Week, 50 This Month
 - Active / Pending:** 68 Active, 19 Pending
- Archived / Assigned:** 164 Archived, 0 Assigned
- Decided / Total:** 101 Decided, 247 Total
- Recent Cases:** A section titled "Recent Cases" with a "View All" link. It lists three cases:
 - United Foam Industries v/s M/s EFU...**: Judge: Ali Akbar Qureshi + Zafar Iqbal Ta..., Court: Lahore CourtInsurance Tribunal L..., Stage: Arguments, Due Date: 15/05/2025
 - Mst Noor Begum v/s Umara, ETC**: Judge: Full bench BOR, Court: Lahore CourtBoard of revenue, Stage: Written Arguments, Due Date: 27/05/2025
 - National Bank of Pakistan v/s M/s U...**: Judge: Misbah Khan, JBC-V, Lahore, Court: Lahore CourtBanking court -V- L..., Stage: Jawab Ul jawab, Due Date: 31/07/2025
- New Case:** A blue circular button with a white plus sign and the text "NEW CASE" below it.
- Count:** A large number "1234" at the bottom left.



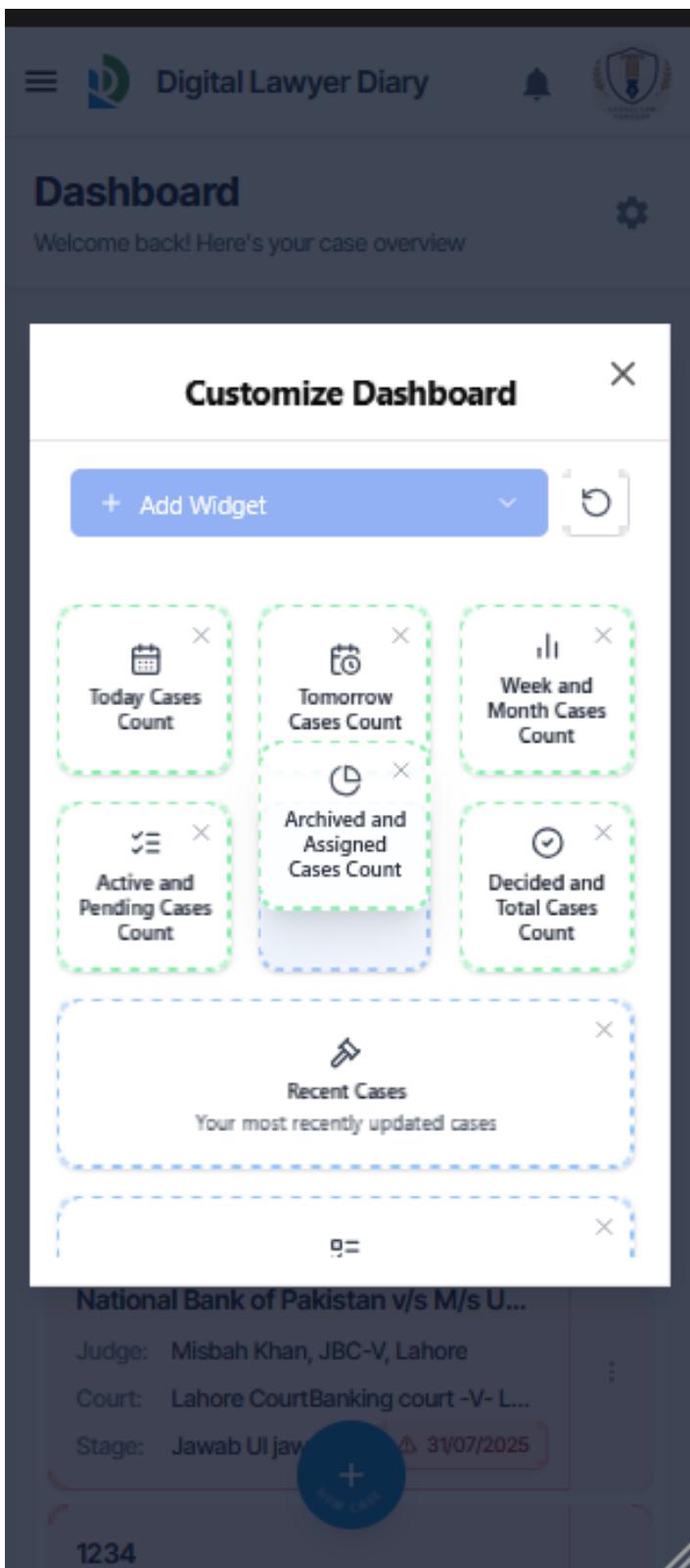
You'll know you're in customization mode when a popup appears



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.



Dashboard



Welcome back! Here's your case overview

Customize Dashboard

+ Add Widget



The modal displays six widgets arranged in two rows of three:

- Today Cases Count**: Calendar icon, red square highlight.
- Archived and Assigned Cases Count**: Clock icon.
- Week and Month Cases Count**: Bar chart icon.
- Active and Pending Cases Count**: List icon.
- Tomorrow Cases Count**: Camera icon.
- Decided and Total Cases Count**: Checkmark icon.

Below these is a single widget labeled "Recent Cases" with a blue dashed border:

- Recent Cases**: Paperclip icon.
- Your most recently updated cases**

National Bank of Pakistan v/s M/s U...

Judge: Misbah Khan, JBC-V, Lahore

Court: Lahore CourtBanking court -V- L...

Stage: Jawab Ul jawan □ 31/07/2025



1234

- 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.

The screenshot shows the 'Digital Lawyer Diary' app's dashboard customization feature. At the top, there are three icons: a menu icon, a bell icon, and a user profile icon. Below that, the word 'Dashboard' is displayed, followed by a gear icon and a welcome message: 'Welcome back! Here's your case overview'. A large central modal window titled 'Customize Dashboard' is open. It features a header bar with a blue background, a white 'Add Widget' button with a plus sign, a dropdown arrow, and a 'reset icon' (a circular arrow). Below this, six widgets are arranged in two rows of three. Each widget has a green dashed border and a close 'X' button. The first row includes: 'Today Cases Count' (calendar icon), 'Archived and Assigned Cases Count' (clock icon), and 'Week and Month Cases Count' (bar chart icon). The second row includes: 'Active and Pending Cases Count' (list icon), 'Tomorrow Cases Count' (camera icon), and 'Decided and Total Cases Count' (checkmark icon). Below these is a 'Recent Cases' section with a blue dashed border, featuring a briefcase icon and the text 'Your most recently updated cases'. At the very bottom of the modal, there is a summary of a specific case: 'National Bank of Pakistan v/s M/s U...', 'Judge: Misbah Khan, JBC-V, Lahore', 'Court: Lahore CourtBanking court -V- L...', 'Stage: Jawab Ul jawan', and a date '31/07/2025'. A blue circular button with a plus sign is located at the bottom center of the modal. The background of the main screen shows a dark theme with some blurred case details like '1234'.

Customize Dashboard

+ Add Widget

Today Cases Count

Archived and Assigned Cases Count

Week and Month Cases Count

Active and Pending Cases Count

Tomorrow Cases Count

Decided and Total Cases Count

Recent Cases

Your most recently updated cases

National Bank of Pakistan v/s M/s U...

Judge: Misbah Khan, JBC-V, Lahore

Court: Lahore CourtBanking court -V- L...

Stage: Jawab Ul jawan 31/07/2025

1234

Tip: You can return to customization mode anytime by clicking the gear icon (⚙) again to make further adjustments.

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.

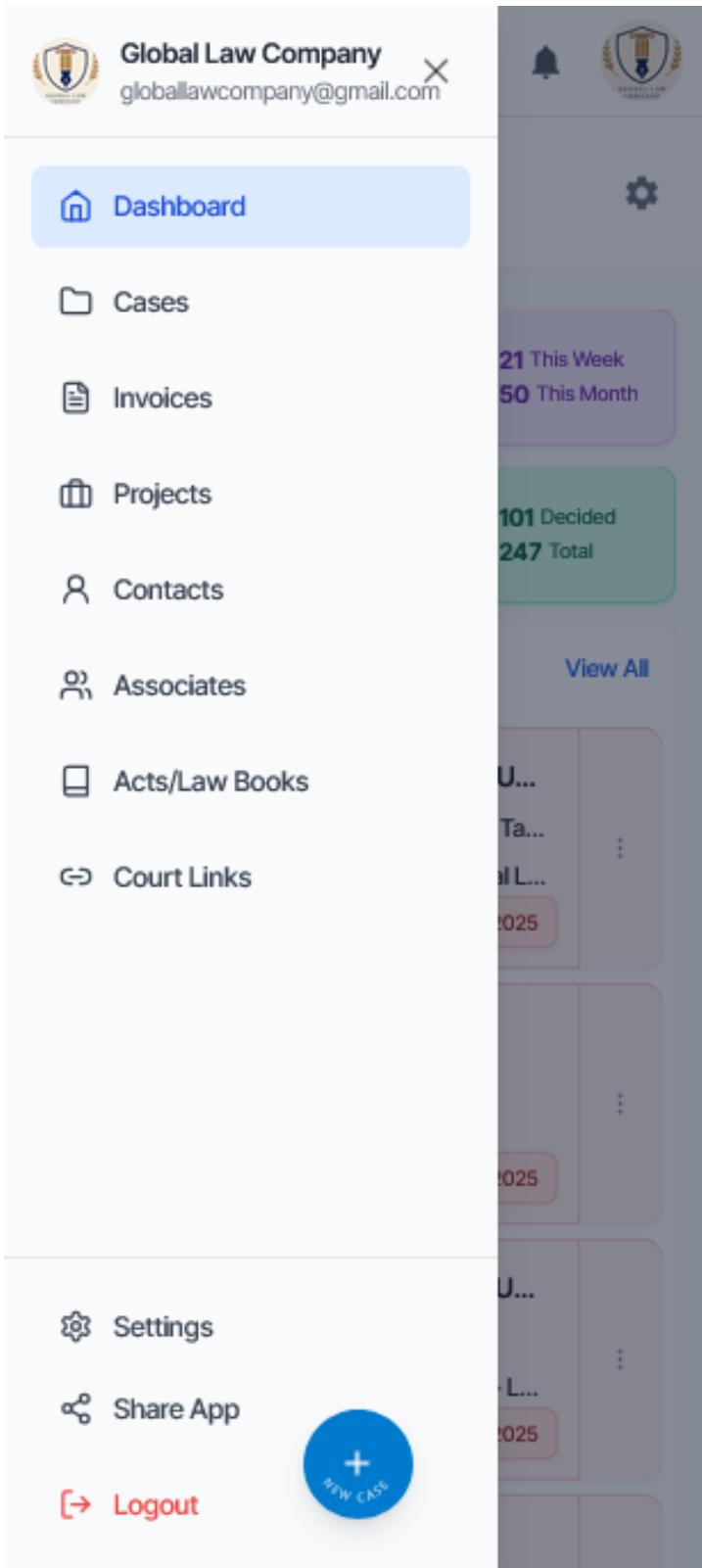
M3. Mobile Navigation: Quick Access on the Go

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.




Active
Pending
Decided
Archived

Active Cases

Fields
Print
Calendar

Tahira younas vs public at large

Judge: Qasir Jameel gujar civil judge Lahore

Court: Lahore CourtCivil Court, Lahore

Stage: Notices

22/10/2025

Khalid Rashid Sheikh Vs Ms stexxa Pvt Ltd ...

Judge: Rana Muhammad Abbas, Civil Judge, Laho...

Court: Lahore CourtCivil Court, Lahore

Stage: Reply of Application

05/11/2025

Tahir Iqbal Baig vs CIR

Judge: Bench vi

Court: Lahore CourtIn land tribunal

Stage: Pilimery urgoment

10/11/2025

Farah Deeba Vs Rubina Yasmeen etc

Judge: Taswer Iqbal Civil Judge, Lahore

Court: Lahore CourtCivil Court, Lahore

Stage: Written Statement

16/10/2025


Muhammad Amin Vs DC Snelkhupura

File number: Tashreef Mianwali District Court, Lahore III DCT, L...

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.



Search Upcoming Hearings



Active

Pending

Decided

Archived

Active Cases

Fields

Print

Calendar

Tahira younas vs public at large

Judge: Qasir Jameel gujar civil judge Lahore

Court: Lahore CourtCivil Court, Lahore

Stage: Notices

22/10/2025

Khalid Rashid Sheikh Vs Ms stexxa Pvt Ltd ...

Judge: Rana Muhammad Abbas, Civil Judge, Laho...

Court: Lahore CourtCivil Court, Lahore

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Judge: Taswer Iqbal Civil Judge, Lahore

Court: Lahore CourtCivil Court, Lahore

Stage: Written Statement

16/10/2025



Muhammad Amin Vs DC Snejkhupura

In reference: Tahir Iqbal Baig vs CIR

- 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."



Search Upcoming Hearings



Active

Pending

Decided

Archived

Active Cases

Fields

Print

Calendar

Tahira younas vs public at large

Judge: Qasir Jameel gujar civil judge Lahore

Court: Lahore CourtCivil Court, Lahore

Stage: Notices

22/10/2025

Khalid Rashid Sheikh Vs Ms stexxa Pvt Ltd ...

Judge: Rana Muhammad Abbas, Civil Judge, Laho...

Court: Lahore CourtCivil Court, Lahore

Stage: Reply of Application

05/11/2025

Tahir Iqbal Baig vs CIR

Judge: Bench vi

Court: Lahore CourtIn land tribunal

Stage: Pilimery urgoment

10/11/2025

Farah Deeba Vs Rubina Yasmeen etc

Judge: Taswer Iqbal Civil Judge, Lahore

Court: Lahore CourtCivil Court, Lahore

Stage: Written Statement

16/10/2025

Muhammad Amin Vs DC Snejkhupura



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.



Search Upcoming Hearings



Active

Pending

Decided

Archived

Active Cases

[Fields](#)[Print](#)[Calendar](#)

Tahira younas vs public at large

Judge: Qasir Jameel gujar civil judge Lahore

Court: Lahore CourtCivil Court, Lahore

Stage: Notices

22/10/2025

...

Khalid Rashid Sheikh Vs Ms stexxa Pvt Ltd ...

Judge: Rana Muhammad Abbas, Civil Judge, Laho...

...

Court: Lahore CourtCivil Court, Lahore

Stage: Reply of Application

05/11/2025

Tahir Iqbal Baig vs CIR

Judge: Bench vi

...

Court: Lahore CourtIn land tribunal

Stage: Pilimery urgoment

10/11/2025

Farah Deeba Vs Rubina Yasmeen etc

Judge: Taswer Iqbal Civil Judge, Lahore

...

Court: Lahore CourtCivil Court, Lahore

Stage: Written Statement

16/10/2025

Muhammad Amin Vs DC Chaklupura

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


Digital Lawyer Diary



Create Case

[Customize](#)

1. Case Details

Office File Number
e.g., 12345-A

Court Case Number
e.g., 6789

Case Title
e.g., John Doe v. Jane Doe

Case Type
Type to search or create new entry

Case Stage
Type to search or create new entry

Court Name
e.g., Supreme Court

Judge Name
Type to search or create new entry

City
Type to search or create new entry

Counsel For
e.g., Plaintiff

Next Date
Pick a date

Notes
e.g., Important notes

Custom Fields
No custom fields added
[+ Add Custom Field](#)

Attachments
Drag and drop files, or click to select
Used: 310 KB / 50 MB (49.7 MB available)

2. Contact Information

3. Additional Information

4. Hidden Fields

[Create Case](#)

- **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.

2. Contact Information

Client Name

Select a contact...

Opponent Name

Select a contact...

Opponent Lawyer

Select a contact...

- **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.

3. Additional Information

Time Sheet

Add new timesheet entry

Case Fee

e.g., \$1000

Case Charge

e.g., \$500

Payment History

Add new payment record

Total Fee: 0

Remaining Fee: 0

- **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

Attachments



Drag and drop files, or click to select

Used: 310 KB / 50 MB (49.7 MB available)

💡 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!

Judge Name

Type to search or create new entry

🔍 As

+ Add entry "As"

Mr. Muhammad Kashif Pasha, Civil Judge,
Lahore



Sadia Aslam CJ Lahore



Naila Naseer Khakwani CJ Lahore



Mr. Justice Shahid Bilal Hasan



Ms. Mehreen Siyab Abbasi, Civil Judge,



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.



Create Case

Customize

1. Case Details



2. Contact Information



3. Additional Information



4. Hidden Fields



Create Case

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.

Add Custom Field

Field Name:

Field Type:

Scope: This case All cases

Add Field

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.



Tahira younas vs public at large

Judge: Qasir Jameel gujar civil judge

Lahore

Stage: Notices

⋮

Next date: 22/10/2025 Quick add

Active



Case Details



Contact Information



Additional Information



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.



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



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.



Tahira younas vs public at large

Judge: Qasir Jameel gujar civil judge

Lahore

Stage: Notices

Next date: 22/10/

Active

- Edit
- Duplicate
- Download
- Share
- History
- Assign To
- Delete

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

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.



Tahira younas vs public at large

Judge: Qasir Jameel gujar civil judge

Lahore

Stage: Notices



Next date: 22/10/2025

Active



✓ Active

Archived

Decided

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

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.



Invoices



Total Invoices

6 All time

Total Revenue

Rs 24,600.00 Rs 18,900.00 collected

Outstanding

Rs 5,700.00 3 unpaid

Paid Invoices

2 Rs 18,900.00 received

Search 6 invoices...

**INV-2025-003**

draft

Abc

Rs 4,200.00

Created: Oct 11, 2025

Due: Nov 10, 2025

INV-2025-002

partial

Irtaza Shah

Rs 2,000.00

Created: Jun 6, 2025

Due: Jul 6, 2025

INV-2025-001

draft

Irtaza Shah

Rs 400.00

Created: Jun 6, 2025

Due: Jul 6, 2025

**INV-2025-696**

draft

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.



Invoices



Total Invoices

6

● All time

Total Revenue

Rs 24,600.00

● Rs 18,900.00 collected

Outstanding

Rs 5,700.00

● 3 unpaid

Paid Invoices

2

● Rs 18,900.00 received

Search 6 invoices...

**INV-2025-003**

draft

Abc

Rs 4,200.00

Created: Oct 11, 2025

Due: Nov 10, 2025

INV-2025-002

partial

Irtaza Shah

Rs 2,000.00

Created: Jun 6, 2025

Due: Jul 6, 2025

INV-2025-001

draft

Irtaza Shah

Rs 400.00

Created: Jun 6, 2025

Due: Jul 6, 2025



draft

INV-2025-696

draft

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



Settings

General Email Language Invoices

Invoice Settings

Customize your invoice settings here

Logo



Currency

Rs (PKR)



Sample amount: Rs 1,234.56

Template

Classic

Modern

Detailed

Invoice Numbering

~~Automatic Numbering~~

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.



Invoices



Total Invoices

6 All time

Total Revenue

Rs 24,600.00 Rs 18,900.00 collected

Outstanding

Rs 5,700.00 3 unpaid

Paid Invoices

2 Rs 18,900.00 received

Search 6 invoices...

**INV-2025-003**

draft

Abc

Rs 4,200.00

Created: Oct 11, 2025

Due: Nov 10, 2025

INV-2025-002

partial

Irtaza Shah

Rs 2,000.00

Created: Jun 6, 2025

Due: Jul 6, 2025

INV-2025-001

draft

Irtaza Shah

Rs 400.00

Created: Jun 6, 2025

Due: Jul 6, 2025

INV-2025-696

draft



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:



Create Invoice

Client/Paralegal *

Muzamil



Associated Case (Optional)

Select a case to associate with this invoice



Case Reference (Optional)

Enter case reference

Case Matter Type (Optional)

Enter case matter type

Invoice Number *

INV-2025-004

Invoice Date *

October 15th, 2025

Due Date *

November 14th, 2025

Items *

+ Add new invoice item

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.

Associated Case (Optional)

Select a case to associate with this invoice

Case Reference (Optional)

Enter case reference

X

Add New Item

Product Name *

Quantity * **Rate ***

- 1 + 0 ↑

Tax *

0 ↑ %

Amount (including tax)

Rs 0.00

Add & New

Add

No items added yet. Click 'Add Item' to add your first invoice item.

Subtotal: Rs 0.00

Discount Type Discount (%)

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: $(\text{Quantity} \times \text{Rate}) + \text{Tax}$
- 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:

 October 15th, 2025

Due Date *

 November 14th, 2025

Items *

+ Add new invoice item

No items added yet. Click 'Add Item' to add your first invoice item.

Subtotal: Rs 0.00

Discount Type **Discount (%)**

Percentage (%)

0

Tax: Rs 0.00

Total: **Rs 0.00**

Notes

Add notes or payment instructions...

Create Invoice

- **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.

[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 1x Rs 400.00

Tax: 15% Rs 340.00

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.

[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 1x Rs 400.00

Tax: 15% Rs 340.00

The screenshot shows the Digital Lawyer Diary app interface. At the top, there's a navigation bar with a menu icon, a 'Digital Lawyer Diary' logo, a bell icon, and a circular emblem for 'GARIB LAW COMPANY'. Below the navigation is a blue button labeled 'Make Payment'. A white pop-up window titled 'Record Payment' is centered. Inside the pop-up, it says 'Record a payment for invoice #INV-2025-004.' and 'Amount due: Rs 920.00'. The pop-up contains fields for 'Payment Amount' (set to 'Rs 920'), 'Payment Date' (set to 'October 15th, 2025'), 'Payment Method' (set to 'Cash'), and 'Reference (Optional)' (with placeholder text 'Transaction ID, Cheque number, etc.'). Below these fields is a note: 'Add a reference number for this payment if applicable.' At the bottom of the pop-up is a large blue button labeled 'Record Payment'. In the background, partially visible, is an invoice summary for 'INV-2025-004' showing 'Legal services' at '1x Rs 400.00' and 'Tax: 15%' at 'Rs 340.00'.

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

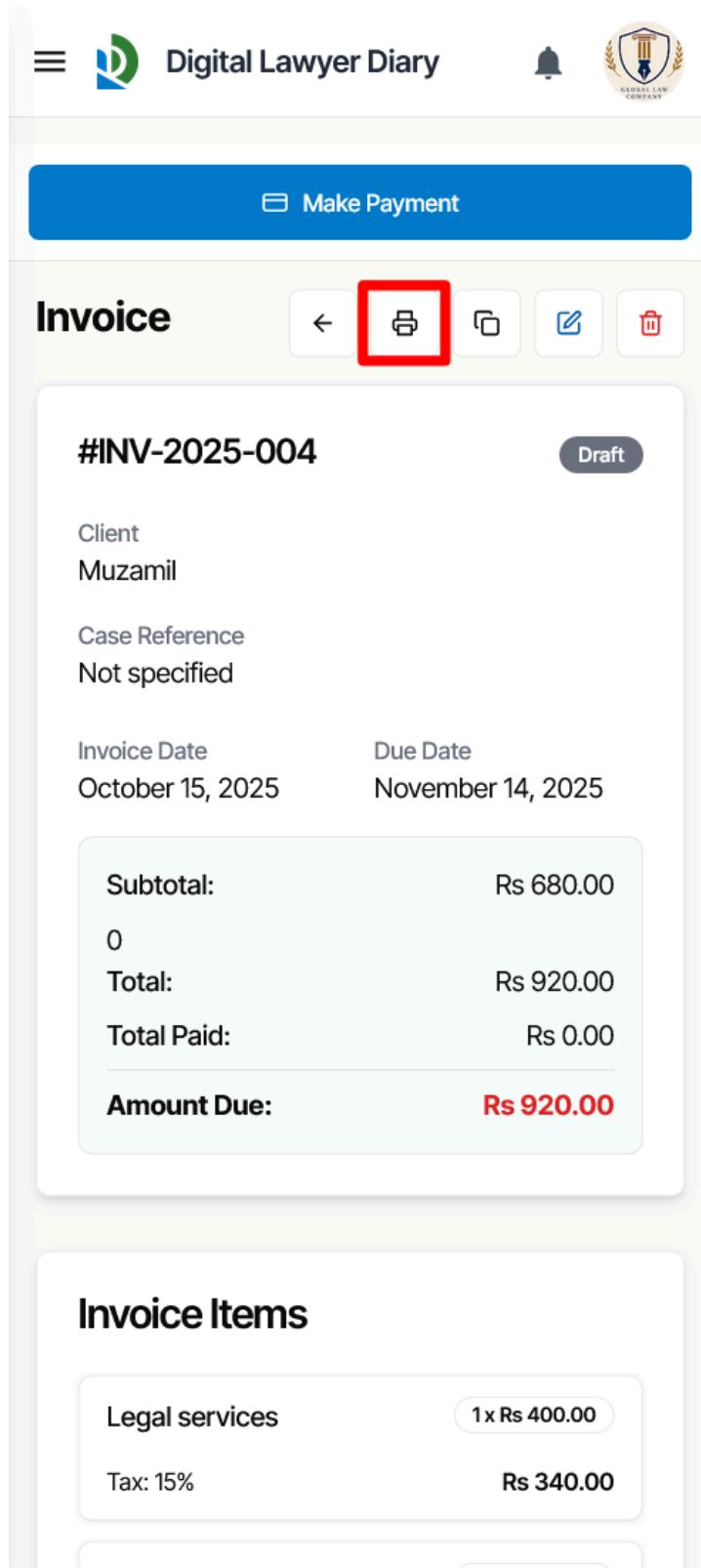
- Enter the **Payment Amount**. You can enter a partial amount or the full amount.
- Select the **Payment Date** and **Payment Method** (e.g., Cash, Bank Transfer).
- Add an optional **Reference** number (like a check number or transaction ID).
- Click "**Record Payment**".

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.



The screenshot shows the Digital Lawyer Diary mobile application interface. At the top, there is a header with the logo 'Digital Lawyer Diary' and a bell icon. Below the header, a blue button labeled 'Make Payment' is visible. The main content area is titled 'Invoice' and displays the invoice number '#INV-2025-004'. A 'Draft' status indicator is shown. The invoice details include:

- Client: Muzamil
- Case Reference: Not specified
- Invoice Date: October 15, 2025
- Due Date: November 14, 2025

A summary table shows the following financial details:

Subtotal:	Rs 680.00
0	
Total:	Rs 920.00
Total Paid:	Rs 0.00
Amount Due:	Rs 920.00

Below this, a section titled 'Invoice Items' lists the breakdown of charges:

Legal services	1x Rs 400.00
Tax: 15%	Rs 340.00

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:



Associates

 Search lawyers...

Abdullah Zahid

Developer

2 cases



Mian Abdullah BSCS 2022 FAST NU LHR

lawyer

7 cases



Muhammad Nouman

lawyer

0 cases



Shafay

Assistant

1 case



United Foam Industries Pvt Ltd

Advocate

5 cases



- 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.

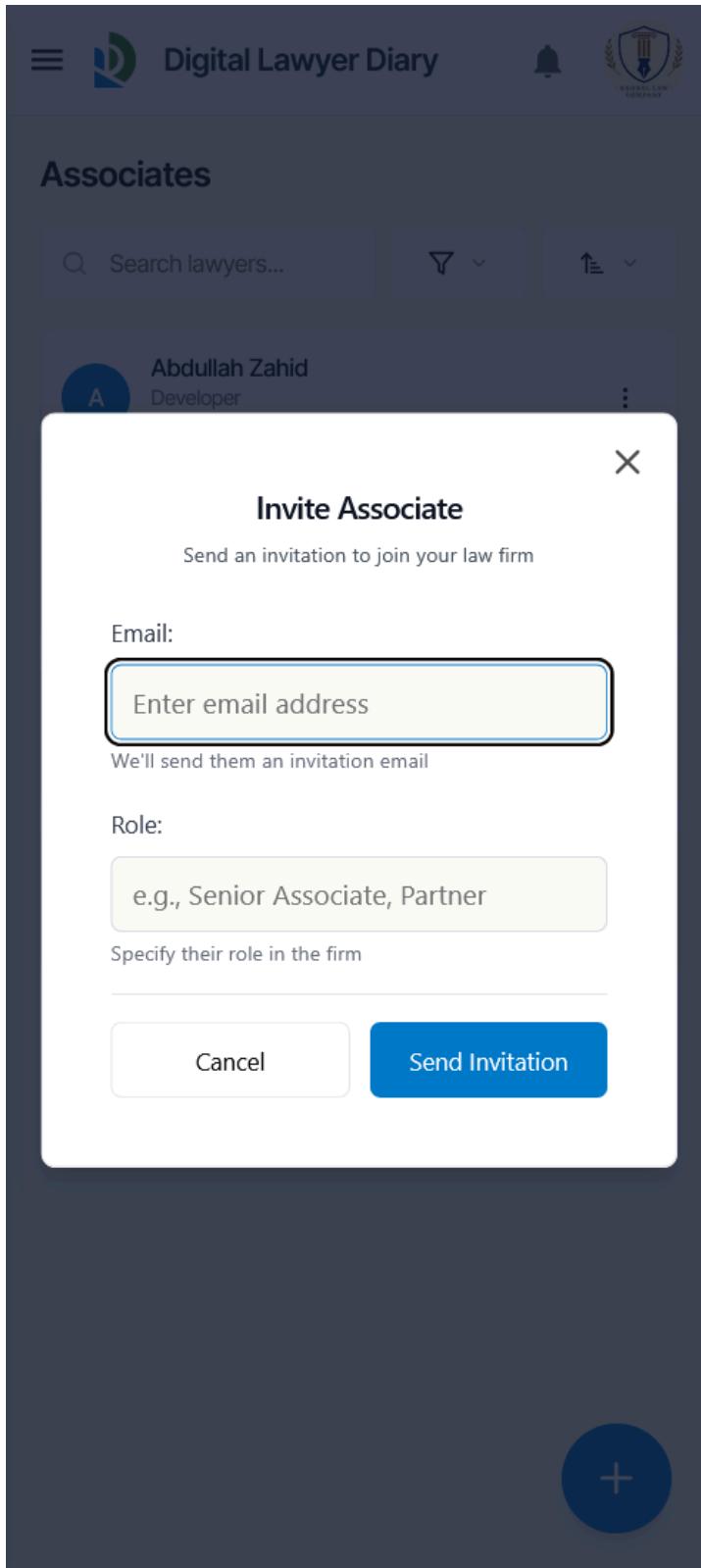
M6.2 Inviting a New Associate

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.

Associates

Search lawyers...

▼

↑ ▼



Abdullah Zahid

Developer

2 cases

⋮



Muhammad Nouman

lawyer

0 cases

⋮



Shafay

Assistant

1 case

⋮



United Foam Industries Pvt Ltd

Advocate

5 cases

⋮

Pending Invitations You Sent

Keep track of invitations that are awaiting a response. You can resend or cancel them anytime.

Mian Abdullah BSCS 2022 FAST N... Pending

Email:

Role: Partner

Sent 15/10/2025

[Resend](#)

[Cancel Invitation](#)

+

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.



Associates

 Search lawyers...

Pending Invitations

**Global Law Company**Invited by Global Law
Company

Accept

Decline

Role: Partner

Date: 15/10/2025



No Associates Found



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.



Associates

Search lawyers...

▾

▾



Abdullah Zahid

Developer

2 cases

⋮



Mian Abdullah BSCS 2022 FAST NU LHR

lawyer

0 cases

⋮



Muhammad Nouman

lawyer

0 cases

⋮



Shafay

Assistant

1 case

⋮



United Foam Industries Pvt Ltd

Advocate

5 cases

⋮



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.

The screenshot shows the 'Associates' section of the Digital Lawyer Diary software. At the top, there's a search bar with placeholder text 'Search lawyers...', a filter icon, and a sort icon. Below the search bar is a list of associates:

- Abdullah Zahid**
Developer
2 cases
- Mian Abdullah BS**
lawyer
0 cases
- Muhammad Nou**
lawyer
0 cases
- Shafay**
Assistant
1 case
- United Foam Industries Pvt Ltd**
Advocate
5 cases

A context menu is open for Abdullah Zahid, listing the following options:

- Assign Cases
- View Assigned Cases
- Change Role
- Remove from Firm

At the bottom center of the screen is a large blue circular button with a white plus sign (+).

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.

The screenshot shows the 'New Project' creation interface. At the top, there's a header with the Digital Lawyer Diary logo, a bell icon, and a green circular 'M'. Below the header, a back arrow and the text '← New Project' are visible. The main area is divided into three sections: 'Project Details', 'Case Reference', and 'Team Members'.

- Project Details:** Contains fields for 'Project Name *' (with placeholder 'This is a new Project') and 'Description' (with placeholder 'This is new project'). It includes a rich text editor toolbar with icons for Bold (B), Italic (I), Heading (H), and other styling options. Below the description is a preview area showing the entered text.
- Case Reference:** A section for linking to a case, with a dropdown menu showing 'Select Case...' and a message 'No cases available'.
- Team Members:** A section for selecting team members. It features a search bar ('Search team members...'), a list of 'Available Team Members' (one entry: 'Global Law Company Partner'), and buttons for 'Select All' and 'Clear All'. At the bottom of this section is a 'Cancel' button and a large blue 'Create Project' button.

- 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 screenshot shows the Digital Lawyer Diary dashboard. The top navigation bar includes a menu icon, the logo "Digital Lawyer Diary", a bell icon, and a user profile icon with the letter "M".

Left Panel (Project Overview):

- Project Status:** Active
- Total Tasks:** 0 tasks
- Task Status Breakdown:**
 - PENDING: 0
 - COMPLETED: 0
 - BLOCKED: 0
- Last Updated:** October 15, 2025
- Link to Case:** Connect this project to an existing case to keep work coordinated. A dropdown menu shows "Select Case..." and a note: "No cases available to link yet." Buttons for "Clear" and "Link Case" are present.
- Team Members:** 0 members

Tasks Section:

- Tasks:** 0 tasks
- Add Task:** + Add Task
- Search and Filter:** Search tasks..., Sort, Status, Assignee
- No tasks yet:** Create your first task to get started with this project. A button "+ Create First Task" is shown.

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 *

Abdullah

Description (Optional)

Edit

Preview

123

Stage

Intake & Assessment

Status

Pending

Due Date (Optional)

Select due date...

Team Assignment

Assign To (Optional)



No team members available

Add associates to your firm first

Milestones

Milestones (Optional)

+ Add

Test

×

Cancel

+ Create Task

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.

The screenshot shows a project management interface. At the top, there's a header with a 'Hide project details' button. Below it, a yellow box highlights the 'Project Status' section, which shows 'Active'. This section also includes 'Total Tasks' (1 task), 'PENDING' (1), 'COMPLETED' (0), and 'BLOCKED' (0) counts. A 'Last Updated' section shows 'October 15, 2025'. Below these are sections for 'Link to Case' (with a dropdown menu 'Select Case...' and a note 'No cases available to link yet'), 'Team Members' (0 members), and 'Tasks' (1 task). The 'Edit Stages' button is highlighted with a red box. The 'Tasks' section at the bottom has a search bar, sorting options, and a list for 'Abdullah'.

Project Status
Active

Total Tasks
1 task

PENDING 1 COMPLETED 0 BLOCKED 0

Last Updated
October 15, 2025

Link to Case
Connect this project to an existing case to keep work coordinated.

Select Case...

No cases available to link yet.

Clear Link Case

Team Members
0 members

No team members added yet. Use the button below to invite collaborators.

Add Members Edit Stages

Tasks 1 task + Add Task

Search tasks... Sort

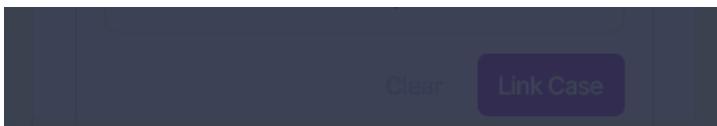
Status Assignee

Abdullah >
Intake & Assessment

123
0/1 milestones

Unassigned

Step 2: In the "Edit Project Stages" window, you can fully customize your workflow:



X

Edit Project Stages

Changes apply only to this project. The first stage in the list becomes the default column on the Kanban board.

Task Stage Configuration

The screenshot shows a list of task stages. Each stage is represented by a colored box containing the stage name, a handle icon (three vertical dots), and edit (pencil) and delete (trash) icons. The stages are: Documentation & Filing (yellow), Hearings & Negotiations (orange), and Resolution & Follow-up (green). Below the list is a dashed box containing a plus sign and the text "Add new stage".

Drag and drop to reorder status options. Changes apply to all task stage dropdowns.

Renaming or reordering stages refreshes the workflow on the next load. Removed stages will move their tasks to the default stage when the board reloads.

Save Stages

Cancel

- **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.