LegalNexus Enterprise

Complete Page Inventory & User Interface Guide

Visual Guide to Every Screen in the Application

Table of Contents

1. Login & Authentication

Page: `/login`

Purpose: Secure entry point to the system

What Users See:

- LegalNexus logo and branding
- "Powered by Vicktoria AI" tagline
- Soul Logic technology badge
- Email address input field
- Password input field
- "Remember Me" checkbox
- "Sign In" button
- "Forgot Password?" link

Features:

- Secure JWT authentication
- Session management
- Password visibility toggle
- Error messages for invalid credentials
- Loading indicator during login

User Flow:

1. User enters email and password
2. Clicks "Sign In"
3. System validates credentials
4. If valid → redirects to Dashboard
5. If invalid → shows error message

Security:

- Encrypted password transmission
- Failed login attempt tracking
- Session timeout after inactivity
- Optional two-factor authentication

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2. Dashboard

Page: `/` (Home)

Purpose: Central command center showing firm performance at a glance

Layout:

- Top navigation bar (always present)
- Sidebar menu (collapsible)
- Main content area with widgets
- Floating AI assistant button (bottom right)

Key Widgets Displayed:

1. Revenue Card

- ■ Current month revenue total
- ■ Percentage change from last month
- ■■ Green arrow if increasing, ■■ red if decreasing
- Clickable → goes to Financial reports

2. Active Matters Card

- ■ Total number of active matters
- ■ Change from last month
- Clickable → goes to Matter List

3. Billable Hours Card

- ■ Total billable hours this month
- ■ Comparison to target
- Progress bar visualization
- Clickable → goes to Timesheet

4. Outstanding Invoices Card

- ■ Total amount outstanding
- ■■ Number of overdue invoices
- Aging breakdown (30/60/90 days)
- Clickable → goes to Invoice List

5. Recent Activity Feed

- ■ Last 10 activities across the system
- Time-stamped entries
- "View All" link → Audit Logs

6. Quick Actions Section

- ■ New Matter button
- ■ New Contact button
- ■ New Company button
- ■ Log Time button
- ■ Create Invoice button

7. Performance Charts

- Revenue trend (last 6 months)
- Hours tracked per attorney
- Matter status breakdown pie chart

8. AI Insights Panel

- ■ Vicktoria AI suggestions
- Today's top 3 recommended actions
- Clickable to open AI Assistant

User Actions:

- View overview metrics
- Click any card to drill down
- Access quick actions
- View recent activity
- Interact with AI insights

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3. Companies Module

Page: `/companies`

Purpose: Manage all client companies

Main View - Company List:

Header:

- ■ "Companies" title
- ■ "New Company" button (top right)
- ■ Search bar (search by name, industry, etc.)
- ■ View options (Grid / List)

Company Cards (Grid View):

Each card shows:

- ■ Company name (large, bold)
- ■ Industry icon and name
- ■ Primary contact name
- ■ Email and phone
- ■ Total revenue (all-time)
- ■ Number of active matters
- ■ Status indicator (Active / Inactive)

- "View Details" button

List View:

Table with columns:

- Company Name
- Industry
- Primary Contact
- Revenue
- Active Matters
- Status
- Actions (View / Edit / Delete)

Filters Panel (Left Sidebar):

- Filter by industry
- Filter by status
- Filter by revenue range
- Filter by department
- "Reset Filters" button

Pagination:

- Results per page selector (10 / 25 / 50)
- Page navigation (← 1 2 3 4 5 →)
- Total count displayed

Page: `/companies/:id` (Company Detail)

Purpose: Complete view of a single company

Layout:

Header Section:

- ■ Company name (large)
- ✏️■ Edit button
- ■■ Delete button
- ■ Back to Companies list

Tab Navigation:

1. Overview
2. Matters
3. Contacts
4. Documents
5. Financials

Tab 1: Overview

- Company Information:**

- Full legal name
- Industry
- Address
- Phone, email, website
- Tax ID / Registration number
- Billing address
- Notes

- Primary Contact:**

- Name, title
- Email, phone
- Photo (if available)
- Link to contact details

- Department Assignment:**

- Which practice area handles this client
- Assigned attorneys

- Statistics:**

- Total revenue (all-time)

- Number of matters (active / closed)
- Average matter value
- Payment history summary

Tab 2: Matters

- Table of all matters for this company
- Columns: Matter Name, Type, Status, Assigned Attorney, Value, Start Date
- Click any row → go to Matter Detail
- ■ "New Matter" button

Tab 3: Contacts

- List of all contacts at this company
- Cards showing: Name, Title, Email, Phone, Photo
- Primary contact highlighted
- ■ "Add Contact" button

Tab 4: Documents

- All documents associated with this company
- Categories: Contracts, Correspondence, Agreements
- Search and filter
- Upload new documents

Tab 5: Financials

- Revenue breakdown by matter
- Invoice history (paid / outstanding)
- Payment trends chart
- Billing rates applicable to this client

Page: `/companies/new` or `/companies/:id/edit` (Company Form)

Purpose: Create new company or edit existing

Form Fields:

Basic Information:

- Company Name (required)
- Legal Name
- Industry (dropdown)
- Company Type (Corporation / Partnership / etc.)

Contact Details:

- Email (required)
- Phone
- Website
- Fax

Address:

- Street Address
- City
- State / Province
- Postal Code
- Country

Billing Details:

- Billing Address (checkbox: same as above)
- Tax ID Number
- Payment Terms (dropdown: Net 30 / Net 60 / etc.)
- Preferred Payment Method

Assignment:

- Primary Director (dropdown: list of attorneys)
- Department (dropdown: Corporate / Litigation / etc.)

Notes:

- Large text area for additional information

Buttons:

- ■ Save Company
- ■ Cancel (returns to list)

Validation:

- Required fields highlighted in red if empty
- Email format validation
- Phone format validation
- Success message on save

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4. Contacts Module

Page: `/contacts`

Purpose: Manage individual people (contacts)

Main View - Contact List:

Header:

- ■ "Contacts" title
- ■ "New Contact" button
- ■ Search bar

Contact Cards:

Each card shows:

- ■ Photo (or placeholder)
- Full name (large)
- ■ Company name (linked)
- ■ Job title
- ■ Email

- ■ Phone
- ■■ Tags (if any)
- "View Details" button

List View Option:

Table with columns:

- Photo
- Name
- Company
- Title
- Email
- Phone
- Actions

Filters:

- Filter by company
- Filter by role
- Filter by tags
- "Reset Filters"

Quick Actions:

- ■ Email contact directly
- ■ Click to call (if integrated)
- ■ Send message

Page: `/contacts/:id` (Contact Detail)

Purpose: Complete contact information

Layout:

Header:

- ■ Photo (large)
- ✏■ Edit / ■■ Delete buttons
- Full name
- Job title at company

Contact Information Panel:

- Email (primary and secondary)
- Phone (office, mobile, home)
- Address
- Social media links (LinkedIn, etc.)

Associated Company:

- Company name (linked)
- Industry
- Relationship to company

Related Matters:

- List of matters this contact is involved in
- Click to view matter details

Communication History:

- Timeline of interactions
- Emails, calls, meetings
- Notes from attorneys

Documents:

- Contracts signed by this contact
- Correspondence sent to them

Notes Section:

- Free-form text area
- Add notes about the contact
- Timestamped entries

Page: `/contacts/new` or `/contacts/:id/edit` (Contact Form)

Form Fields:

Personal Information:

- First Name (required)
- Last Name (required)
- Job Title
- Photo upload

Contact Details:

- Email (primary, required)
- Email (secondary)
- Phone (office)
- Phone (mobile)
- Phone (home)

Company Association:

- Company (dropdown, searchable)
- Role at company
- Decision maker? (checkbox)

Address:

- Street, City, State, Postal Code, Country

Social Media:

- LinkedIn URL
- Twitter handle

Tags:

- Add searchable tags (e.g., "Decision Maker", "Finance", "Technical")

Notes:

- Additional information

Buttons:

- ■ Save Contact
- ■ Cancel

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5. Sales Pipeline

Page: `/sales`

Purpose: Visual management of potential deals

Header:

- ■ "Sales Pipeline" title
- ■ "New Deal" button
- ■ Search deals
- ■ Pipeline summary stats

Pipeline Statistics (Top Bar):

- ■ Total Pipeline Value (sum of all deals)
- ■ Weighted Value (probability-adjusted)
- ■ Conversion Rate
- ■■ Average Days in Pipeline

Kanban Board Layout:

Five vertical columns representing stages:

1. **Lead** (■ Blue)
2. **Qualified** (■ Green)
3. **Proposal** (■ Yellow)

4. **Negotiation** (■ Orange)
5. **Closed** (■ Red / ■ Green)

Each Column Shows:

- Column title
- Deal count in that stage
- Total value in that stage
- Drag-and-drop zone

Deal Cards (draggable):

Each card displays:

- Deal name (e.g., "ABC Corp - Merger Advisory")
- ■ Company name
- ■ Deal value (e.g., "R250,000")
- ■ Close probability (e.g., "65%")
- ■ Expected close date
- ■ Days in current stage (e.g., "12 days")
- ■ Assigned attorney avatar
- ■ AI confidence indicator (color-coded)

AI Insights Panel (Right Sidebar):

- ■ "Vicktoria AI Insights" header
- Pipeline health score (0-100)
- Top 3 at-risk deals
- Top 3 high-potential deals
- Recommended actions

User Actions:

- Drag cards between stages
- Click card → view deal details
- Filter by attorney, value, probability
- Sort by various criteria
- Export pipeline report

Page: `/sales/:id` (Deal Detail)

Purpose: Complete information about a deal

Layout:

Header:

- Deal name (large)
- Current stage badge (colored)
- ✏■ Edit / ■■ Delete / ■ Back

Deal Information:

- Company name (linked)
- Contact person (linked)
- Deal value
- Probability of closing
- Expected close date
- Assigned attorney
- Deal source (referral, marketing, etc.)

AI Prediction Panel:

- ■ "AI Close Probability"
- Percentage with confidence level
- Key factors affecting probability
- Recommended next actions

Stage History:

- Timeline showing movement through stages
- Dates entered each stage
- Duration in each stage

Activities Timeline:

- All activities related to this deal
- Meetings, calls, emails
- Proposal sent, follow-ups
- Add new activity button

Documents:

- Proposals sent
- Contracts
- Presentations
- Upload new documents

Notes:

- Internal notes about the deal
- Strategy discussions
- Next steps

Related Matters:

- If deal closed, link to created matter

Page: `/sales/new` or `/sales/:id/edit` (Deal Form)

Form Fields:

Basic Information:

- Deal Name (required)
- Company (dropdown, searchable)
- Contact Person (dropdown)
- Deal Description

Financial:

- Estimated Value (required)
- Probability (slider: 0-100%)
- Expected Close Date (date picker)

Assignment:

- Assigned Attorney (dropdown)
- Department / Practice Area

Source:

- How did we get this lead? (dropdown)

Stage:

- Current stage (dropdown)

Notes:

- Internal notes

Buttons:

- ■ Save Deal
- ■ Cancel

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6. Matter Management

Page: `/matters`

Purpose: List and manage all legal matters

Header:

- ■■ "Matters" title
- ■ "New Matter" button
- ■ "Lightning Path" button (guided matter creation)

- ■ Search bar

Matter Cards/List:

Each matter shows:

- ■ Matter name (e.g., "Smith v. Jones - Litigation")
- ■■ Matter type badge (Litigation / Corporate / etc.)
- ■ Client company name
- ■ Assigned attorney
- ■ Total billed / Total time tracked
- ■ Start date
- ■ Status indicator (Active / On Hold / Closed)
- ■ Last activity timestamp
- "View" button

Filters (Left Sidebar):

- Filter by status
- Filter by matter type
- Filter by assigned attorney
- Filter by client
- Filter by department
- Date range filter

Quick Stats (Top):

- Total active matters
- Total billed this month
- Average matter value
- Matters needing attention (flag)

List View Columns:

- Matter Name
- Client
- Type
- Assigned Attorney

- Status
- Start Date
- Value
- Actions

Page: `/matters/:id` (Matter View)

Purpose: Complete details and management of a matter

Header:

- ■ Matter name (large)
- ■■ Matter type badge
- ■ Status badge
- ✏■ Edit / ■■ Delete / ■ Back

Tab Navigation:

1. Overview
2. Time Entries
3. Documents
4. Invoices
5. Activity Log

Tab 1: Overview

Matter Details:

- Client name (linked)
- Matter type
- Description
- Start date / Expected end date
- Status

Team:

- Lead attorney (photo + name)
- Supporting attorneys
- Paralegals / Support staff
- External counsel (if any)

Billing Information:

- Fee structure (hourly / fixed / contingency)
- Hourly rates per attorney
- Total time tracked
- Total billed to date
- Outstanding balance

Related Information:

- Related matters (if any)
- Related deals (if converted from pipeline)
- Court case number (if litigation)
- Deadlines and milestones

Quick Actions:

- ■ Log Time
- ■ Upload Document
- ■ Create Invoice
- ■ Email Client

Tab 2: Time Entries

- Table of all time logged on this matter
- Columns: Date, Attorney, Hours, Description, Billed Status, Amount
- Filter by date range, attorney
- Total hours and value displayed
- ■ "Add Time Entry" button
- ■ Time tracking chart (by week/month)

Tab 3: Documents

- All documents associated with matter
- Folders: Pleadings, Contracts, Correspondence, Discovery, etc.
- Search and filter documents
- Preview documents inline
- ■■ Upload new documents
- ■ Download documents

Tab 4: Invoices

- All invoices related to this matter
- Invoice number, date, amount, status
- Outstanding balance highlighted
- ■ "Create Invoice" button
- Click invoice → view details

Tab 5: Activity Log

- Complete timeline of matter activity
- Time logged, documents added, invoices created
- Status changes, notes added
- Who did what, when
- Filter by activity type

Page: `/matters/new` or `/matters/:id/edit` (Matter Form)

Form Fields:

Basic Information:

- Matter Name (required)
- Client (dropdown, searchable)

- Matter Type (dropdown: Litigation, Corporate, Real Estate, etc.)
- Description (text area)

Dates:

- Start Date (required)
- Expected End Date
- Actual End Date (for closed matters)

Status:

- Current status (Active / On Hold / Closed)

Assignment:

- Lead Attorney (dropdown, required)
- Supporting Attorneys (multi-select)
- Department

Billing:

- Fee Structure (Hourly / Fixed Fee / Contingency / Hybrid)
- Hourly Rate (if hourly)
- Fixed Fee Amount (if fixed)
- Contingency Percentage (if contingency)
- Billing Contact (dropdown from client contacts)

Court Information (if litigation):

- Court name
- Case number
- Judge name

Related Matters:

- Link to related matters (multi-select)

Notes:

- Internal notes

Buttons:

- ■ Save Matter
- ■ Cancel

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7. Lightning Path

Page: `/lightning-path`

Purpose: Guided workflow for common matter types

Header:

- ■ "Lightning Path" title
- Subtitle: "Guided Matter Creation"

Main Content:

Matter Type Selection:

Cards for common matter types:

- ■■ **Litigation** - Court cases, disputes
- ■ **Corporate** - M&A, governance
- ■ **Real Estate** - Property transactions
- ■ **Employment** - Labor matters
- ■■■■■ **Family Law** - Divorce, custody
- ■ **Commercial** - Contracts, negotiations

Each Card Shows:

- Icon
- Matter type name
- Brief description
- "Start" button

When User Clicks "Start":

Step-by-Step Wizard:

Step 1: Basic Information

- Matter name
- Client selection
- Matter description
- ➡■ Next button

Step 2: Team Assignment

- Lead attorney (required)
- Supporting team members
- ■■ Back / ➡■ Next

Step 3: Billing Setup

- Fee structure selection
- Rates configuration
- Billing contact
- ■■ Back / ➡■ Next

Step 4: Checklist & Tasks

- Pre-populated checklist for this matter type
- Example for Litigation:

- ■ Initial client consultation
- ■ Gather evidence
- ■ Draft complaint
- ■ File with court
- ■ Serve defendant
- etc.

- User can add/remove tasks
- ■■ Back / ➡■ Next

Step 5: Documents

- Template documents for this matter type

- Select which to use
- Upload initial documents
- ■■ Back / ➡■ Next

Step 6: Review & Create

- Summary of all information entered
- ■ "Create Matter" button
- ■ "Cancel"

After Creation:

- Matter created with all details
- Checklist tasks added
- Template documents attached
- Redirect to Matter View
- Success message displayed

Benefits:

- Ensures nothing is forgotten
- Standardizes matter setup
- Reduces setup time by 70%
- Includes best practices

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8. Legal Documents

Page: `/legal`

Purpose: Central repository for all legal documents

Header:

- ■ "Legal Documents" title

- ■■ "Upload Document" button
- ■ Search documents

Main View:

Document List/Grid:

Each document card shows:

- ■ Document icon (based on type: PDF, DOCX, etc.)
- Document name
- ■■ Category badge
- ■ Upload date
- ■ Uploaded by
- ■ Associated company
- ■■ Associated matter (if any)
- ■ File size
- Actions: View / Download / Edit / Delete

Categories (Left Sidebar):

- All Documents
- Contracts & Agreements
- Court Filings
- Correspondence
- Client Documents
- Internal Memos
- Research
- Templates

Filters:

- Date range
- Document type
- Associated company
- Associated matter
- Uploaded by

Document Preview:

- Click any document → preview pane opens
- PDF viewer for PDFs
- Office document viewer for DOCX/XLSX
- "Download" and "Print" options

Bulk Actions:

- Select multiple documents (checkboxes)
- Download selected (ZIP file)
- Delete selected
- Move to folder
- Tag selected

Page: `/legal/:id` (Document Viewer)

Purpose: View and manage a single document

Layout:

Left Panel: Document Viewer

- Full-screen document preview
- Zoom controls (+ / -)
- Page navigation (for multi-page docs)
- Download button
- Print button

Right Panel: Document Details

Information:

- Document name
- Category

- File type and size
- Upload date and time
- Uploaded by (user name)

Associations:

- Company (linked)
- Matter (linked)
- Contact (if relevant)

Version History:

- List of all versions
- Who uploaded each version
- When it was uploaded
- "Restore" option for previous versions

Tags:

- Searchable tags
- Add new tags

Terms & Conditions (if contract):

- Automatically extracted key terms
- Effective dates
- Expiry dates
- Parties involved
- Key clauses

Notes:

- Add notes about this document
- Timestamped entries
- Visible to team members

Actions:

- ✏■ Edit metadata
- ■■ Delete document

- ■ Email to client
- ■ Copy link to document

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9. Time Tracking

Page: `/time-tracking/timesheet`

Purpose: Log billable time entries

Header:

- ■ "Timesheet" title
- ■ Date range selector (This Week / This Month / Custom)
- ■ "New Time Entry" button

Calendar View (Primary View):

Weekly Calendar:

- 7 columns (Mon-Sun)
- Each day shows:

- Date
- Total hours logged that day
- List of time entries

Time Entry Cards (on calendar):

Each entry shows:

- ■ Duration (e.g., "2.5 hours")
- ■ Matter name
- ■ Description (truncated)
- ■ Billable amount (e.g., "R3,750")
- ✏■ Edit icon

- ■■ Delete icon

Daily Summary (below calendar):

- Total hours this week
- Total billable amount
- Billable vs. non-billable breakdown
- Chart visualization

Filter Options:

- Show all entries / My entries only
- Billable / Non-billable / Both
- By matter
- By client

Page: `/time-tracking/timesheet/new` (Time Entry Form)

Purpose: Create a new time entry

Form (Modal or Slide-in Panel):

Date & Duration:

- Date (date picker)
- Start time (optional)
- End time (optional)
- OR** Duration (hours, e.g., 2.5)

Matter:

- Matter selection (dropdown, searchable)
- Displays client name automatically
- Shows applicable rate

Description:

- Text area for work description
- Character count
- Autocomplete suggestions (based on previous entries)

Task Type:

- Dropdown: Research, Writing, Meeting, Court Appearance, Travel, etc.

Billable:

- Toggle: Billable / Non-Billable
- If non-billable, reason dropdown

Amount:

- Auto-calculated (Duration × Rate)
- Can be overridden manually

Buttons:

- ■ Save Entry
- ■ Cancel

Validation:

- Matter required
- Description required (min 10 characters)
- Duration required and > 0

Success:

- Entry saved
- Calendar updates
- Success message shown
- Form resets for quick entry of another

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10. Billing Packs

Page: `/time-tracking/billing-packs`

Purpose: Manage collections of time entries ready for invoicing

Header:

- ■ "Billing Packs" title
- ■ "Generate New Billing Pack" button
- ■ Search billing packs

Billing Pack List:

Each billing pack card shows:

- ■ Pack name (e.g., "February 2026 - Corporate")
- ■ Date range (e.g., "Feb 1 - Feb 28, 2026")
- ■ Attorney / Department
- ■ Total hours
- ■ Total value
- ■ Status badge (Draft / Ready / Invoiced)
- ■ Number of entries
- "View" button

Filters:

- Filter by status
- Filter by attorney
- Filter by date range
- Filter by client

List View Columns:

- Pack Name
- Date Range
- Attorney
- Hours
- Value

- Status
- Actions

Page: `/time-tracking/billing-packs/new` (Generate Billing Pack)

Purpose: Create a new billing pack

Step 1: Selection Criteria

Date Range:

- Start date (date picker)
- End date (date picker)
- Quick options: This Month / Last Month / This Quarter

Filter By:

- Attorney (dropdown, multi-select)
- Matter (dropdown, multi-select)
- Client (dropdown, multi-select)
- Department (dropdown)

Include:

- ■ Billable entries only (default)
- ■ Non-billable entries
- ■ Previously billed entries

Preview Button:

- Shows count and total value of matching entries
- "X entries found, total value: R XXX,XXX"

Step 2: Review Entries

Entries Table:

- Columns: Date, Attorney, Matter, Client, Hours, Description, Amount
- Checkboxes to include/exclude specific entries
- Edit entry inline (adjust hours or amount)
- Total hours and value displayed at bottom

Bulk Actions:

- Select all / Deselect all
- Remove selected entries
- Adjust rates for selected

Step 3: Pack Details

Pack Information:

- Pack name (auto-generated, editable)
- Notes (optional)
- Status (Draft / Ready for invoicing)

Grouping Options:

- Group by client (creates multiple packs)
- Group by matter
- Single pack for all

Buttons:

- ■ Create Billing Pack(s)
- ■■ Back
- ■ Cancel

After Creation:

- Pack(s) created
- Redirect to Billing Pack View
- Success message
- Option to create invoice immediately

Page: `/time-tracking/billing-packs/:id` (Billing Pack View)

Purpose: View and manage a billing pack

Header:

- ■ Pack name
- ■ Status badge
- ✏■ Edit / ■■ Delete / ■ Back

Pack Information:

- Date range
- Created by
- Created date
- Attorney(s) included
- Client(s) included

Summary Statistics:

- Total hours
- Total value
- Number of entries
- Average hourly rate

Entries Table:

- All time entries in this pack
- Sortable columns
- Filter/search within pack
- Export to Excel/CSV

Actions:

- ■ "Create Invoice" button (if not invoiced)
- ■ "Email Pack" (send to client for review)
- ■ "Export PDF"

- ✏■ "Edit Pack" (add/remove entries)

Status Actions:

- If Draft → "Mark as Ready"
- If Ready → "Create Invoice"
- If Invoiced → "View Invoice" (link)

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11. Invoicing

Page: `/invoicing/invoices`

Purpose: Manage all invoices

Header:

- ■ "Invoices" title
- ■ "New Invoice" button
- ■ Search invoices

Invoice Cards/List:

Each invoice shows:

- ■ Invoice number (e.g., "INV-2026-0042")
- ■ Client name
- ■ Invoice date
- ■ Due date
- ■ Total amount
- ■ Amount paid
- ■ Status badge (Draft / Sent / Paid / Overdue)
- ■■ Days overdue (if applicable)
- "View" button

Status Colors:

- ■ Draft (blue)
- ■ Sent (yellow)
- ■ Paid (green)
- ■ Overdue (red)

Summary Cards (Top):

- Total Outstanding
- Total Overdue
- Total Paid This Month
- Average Days to Payment

Filters (Left Sidebar):

- Filter by status
- Filter by client
- Filter by date range
- Filter by amount range
- Aging: 0-30 / 31-60 / 61-90 / 90+ days

Charts:

- Revenue by month (bar chart)
- Aging analysis (pie chart)
- Payment trends

Page: `/invoicing/invoices/:id` (Invoice View)

Purpose: View complete invoice details

Layout:

Professional Invoice Format:

Header:

- ■ Your firm's logo
- Firm name and address
- "INVOICE" (large, prominent)

Invoice Information:

- Invoice number
- Invoice date
- Due date
- Payment terms

Bill To:

- Client company name
- Client address
- Client contact

Line Items Table:

- Columns: Date, Description, Quantity (hours), Rate, Amount
- Each time entry as a line item
- Subtotal

Additional Charges:

- Expenses (if any)
- Disbursements
- Subtotal of additional charges

Totals:

- Subtotal (time + expenses)
- Tax (if applicable)
- Total Due** (bold, large)
- Amount Paid (if any)
- Balance Due** (if partially paid)

Payment Information:

- Bank details
- Payment methods accepted
- Payment instructions

Notes:

- Terms and conditions
- Thank you message

Action Buttons (Top Right):

- ■ Email to Client
- ■■ Print / Download PDF
- ✏■ Edit Invoice
- ■ Record Payment
- ■■ Delete Invoice

Payment History (Below Invoice):

- Table of payments received
- Date, amount, method, reference
- ■ "Add Payment" button

Status Actions:

- If Draft → "Send to Client"
- If Sent → "Mark as Paid" / "Record Partial Payment"
- If Overdue → "Send Reminder"

Page: `/invoicing/invoices/new` or `/invoicing/invoices/:id/edit` (Invoice Form)

Purpose: Create or edit an invoice

Step 1: Basic Information

Client:

- Select client (dropdown, searchable)
- Auto-populates billing address

Invoice Details:

- Invoice number (auto-generated, editable)
- Invoice date (default: today)
- Due date (default: based on payment terms)
- Payment terms (Net 30 / Net 60 / Due on Receipt)

Step 2: Line Items

Option 1: From Billing Pack

- "Import from Billing Pack" button
- Select billing pack
- All entries imported as line items

Option 2: Manual Entry

- ■ "Add Line Item" button
- For each item:

- Date
- Description
- Quantity (hours or units)
- Rate
- Amount (auto-calculated)
- Remove item (■■)

Line Items Display:

- Table showing all items
- Editable inline
- Drag to reorder
- Subtotal displayed

Step 3: Additional Charges

Expenses:

- ■ "Add Expense"
- Description, amount
- Receipts (attach if available)

Disbursements:

- Court fees, filing fees, etc.

Step 4: Totals & Tax

Calculations:

- Subtotal (line items)
- Expenses total
- Subtotal before tax
- Tax (percentage, if applicable)
- Total Due** (bold)

Step 5: Notes & Terms

Payment Instructions:

- Bank account details
- Payment methods

Notes to Client:

- Thank you message
- Additional instructions

Terms & Conditions:

- Late payment fees
- Dispute resolution
- Other terms

Step 6: Review & Send

Preview:

- Shows invoice as client will see it
- "Edit" button returns to form

Actions:

- ■ Save as Draft
- ■ Save and Send to Client
- ■ Cancel

After Creation:

- Invoice saved
- If "Send": email sent to client immediately
- Redirect to Invoice View
- Success message

---

12. Financials

Page: `/financials`

Purpose: Financial overview and transaction management

Header:

- ■ "Financials" title
- Tab navigation: Overview / Transactions / Bank Accounts / Projections

Tab 1: Overview

Key Metrics (Cards):

- ■ Current Balance
- ■ Income This Month
- ■ Expenses This Month
- ■ Net Income (Income - Expenses)

Charts:

- Income vs. Expenses (bar chart, last 6 months)
- Expense Categories (pie chart)
- Cash Flow Trend (line chart)

AI Insights Panel:

- ■ "Financial Insights by Vicktoria AI"
- Top 3 insights about spending
- Recommendations
- Warnings (e.g., "Expenses up 15% this month")

Tab 2: Transactions

Transaction List:

Each transaction shows:

- ■ Date
- ■ Description
- ■■ Category (with icon)
- ■ Amount (red for expenses, green for income)
- ■ Account
- ■ AI Confidence (% badge)
- ✏■ Edit category

Filters:

- Date range
- Category
- Amount range
- Account
- Type (Income / Expense)

CSV Upload:

- ■■ "Upload CSV" button (prominent)

- Click → opens CSV upload modal

Transaction Details (Click any):

- Full description
- Original category (from bank)
- AI suggested category
- Confidence level
- Override category (dropdown)
- Add notes
- Attach receipt

Tab 3: Bank Accounts

Account List:

Each account card shows:

- ■ Bank name
- Account type (Checking / Savings / etc.)
- Account number (last 4 digits)
- ■ Current balance
- ■ Transaction count this month
- "View Transactions" button
- ✏■ Edit / ■■ Delete

Add Account:

- ■ "New Bank Account" button
- Form: Bank name, account type, account number, starting balance

Tab 4: Projections

12-Month Projection Chart:

- Line chart showing:

- Projected balance (blue line)

- Projected income (green bars)

- Projected expenses (red bars)

- ■ "AI Seasonal Adjustment" badge (if active)

Projection Metadata:

- Historical period analyzed (e.g., "Based on 365 days")
- Average income per month
- Average expenses per month
- Seasonal adjustment active: Yes/No

Seasonal Patterns Section:

- Shows detected spending patterns
- Pattern strength indicator
- Highest expense months
- Lowest expense months
- Year-over-year growth
- AI insights about patterns

Actions:

- ■ Export Projection PDF
- ■ Refresh Projections
- ■■ Adjust Parameters

CSV Upload Modal

Purpose: Upload bank statements for automatic categorization

Step 1: Upload File

- Drag-and-drop zone
- "Choose File" button
- Supported formats: CSV
- Max file size: 10MB

Step 2: Select Account

- Dropdown: Which bank account is this for?
- "Create New Account" option

Step 3: Format Detection

- System auto-detects CSV format
- Shows detected columns
- Preview first 5 rows
- Format options: Standard / Chase / Bank of America / Custom

Step 4: Processing

- Progress bar
- "Analyzing transactions with AI..."
- "Categorizing X transactions..."
- "Detecting duplicates..."

Step 5: Review Results

- Summary:

- ■ X transactions imported
- ■■ Y duplicates skipped
- ■ Z transactions categorized
- ■ Average confidence: XX%

Uploaded Transactions Table:

- All newly imported transactions
- Show AI category and confidence
- Allow override before saving
- Checkboxes to include/exclude

Final Actions:

- ■ "Save Transactions"
- ■ "Cancel Import"

After Import:

- Transactions added to database
- Success message with summary
- Option to view transactions
- CSV file auto-deleted from server

Seasonal Patterns Component

Purpose: Visualize spending patterns

AI Insights Section:

- Gradient background
- ■ Icon
- "Spending Pattern Insights" title
- 3-4 bullet points with insights
- Examples:

- "December expenses are typically 15% higher due to year-end costs"
- "March shows consistent spike in marketing spend"
- "Your summer months (Jun-Aug) average 10% lower expenses"

Pattern Strength Indicator:

- Visual gauge (0-100%)
- Color-coded: Low (red), Medium (yellow), High (green)
- Text: "Strong seasonal patterns detected"

Chart Toggle:

- Buttons: "Balance View" / "Income vs Expenses"
- Switch between chart types

Monthly Pattern Chart:

- Bar chart showing:

- Income (green bars)
- Expenses (red bars)
  - Hover: exact amounts
  - Highlight highest/lowest

Year-over-Year Growth:

- For each month, show % change from previous year
- Badges with + or - values
- Color-coded (green = good, red = concerning)

---

13. Reporting Dashboard

Page: `/reporting` (LegalNexus)

Purpose: Executive intelligence and firm analytics

Header:

- ■ "LegalNexus Reporting" title
- ■ "Powered by Vicktoria AI" subtitle
- ■ Period selector (Month / Quarter / Year / Custom)
- ■ Refresh button

Tab Navigation:

1. Executive Summary
2. Fee Earner Rankings
3. Practice Area Analytics
4. Workload Analysis
5. Billing Inertia
6. Practice Velocity

Date Range Picker (Top Right):

- Quick select buttons: Month / Quarter / Year / Custom
- Custom: Start date & end date pickers
- "Apply" button

All Tabs Have:

- ■ "Export PDF" button (top right)
- Loading indicator while data loads
- Last updated timestamp

Tab 1: Executive Summary

Key Metrics (Cards):

- ■ Total Revenue
- ■ Billable Hours
- ■ Outstanding Invoices
- ■ Realization Rate
- ■ Average Rate
- ■ Active Matters

Revenue Chart:

- Bar chart: Revenue by month (last 12 months)
- Trend line
- Target line (if set)

Practice Area Breakdown:

- Pie chart: Revenue by practice area
- Legend with percentages

Top Fee Earners:

- List of top 5 attorneys by revenue

- Photo, name, revenue amount
- Change from previous period

Top Clients:

- List of top 5 clients by revenue
- Company name, revenue, number of matters

Summary Text:

- AI-generated executive summary paragraph
- Highlights key trends
- Calls out concerns or opportunities

Tab 2: Fee Earner Rankings

Attorney Ranking Table:

Columns:

1. **Rank** (1, 2, 3, etc.)

- ■ Gold medal for #1
- ■ Silver for #2
- ■ Bronze for #3

2. **Attorney** (photo + name)
3. **Revenue Generated**
4. **Billable Hours**
5. **Average Rate**
6. **Realization Rate** (%)
7. **Active Matters**
8. **Trend** (■■ up, ■■ down, → flat)

Features:

- Sortable by any column

- Search attorney name
- Color-coded rows (alternating)
- Hover: shows more details

Charts:

- Bar chart: Revenue by attorney
- Pie chart: Hours distribution

Insights:

- ■ AI commentary on performance
- "Top performer: [Name] generated R XXX,XXX"
- "Concern: [Name] has low realization rate"

Tab 3: Practice Area Analytics

Practice Area Cards:

Each practice area (Corporate, Litigation, etc.) gets a card:

- ■■ Practice area name
- ■ Total revenue
- ■ Billable hours
- ■ Percentage of firm revenue
- ■ Growth (% change from previous period)
- "View Details" button

Revenue Comparison Chart:

- Stacked bar chart: Revenue by practice area over time
- Shows trends and shifts

Hours Distribution:

- Pie chart: Hours by practice area

- Legend with percentages

Profitability Analysis:

- Table: Practice Area / Revenue / Costs / Profit Margin
- Sortable
- Color-coded margins

AI Insights:

- Growth opportunities
- Underperforming areas
- Resource allocation recommendations

Tab 4: Workload Analysis

Purpose: Understand matter distribution and capacity

Attorney Workload Table:

Columns:

- Attorney name
- Active matters count
- Total hours logged this period
- Hours per matter (average)
- Utilization rate (% of capacity)
- Status indicator (■ Good / ■ High / ■ Overloaded)

Workload Distribution Chart:

- Bar chart: Matters per attorney
- Horizontal bars
- Color-coded by utilization

Capacity Planning:

- Total firm capacity
- Current utilization
- Available capacity
- Recommendation: "Can take on X more matters"

Matter Type Distribution:

- Pie chart: Active matters by type
- Shows where firm is focused

Department Analysis:

- Table: Department / Attorneys / Matters / Utilization
- Identifies bottlenecks

Tab 5: Billing Inertia

Purpose: Critical revenue at risk report

Alert Banner (if critical):

- ■■ Red banner
- "REVENUE AT RISK: R X,XXX,XXX"
- "X attorneys with critical inertia scores"

Summary Cards:

- ■ Total Unbilled Amount
- ■ Attorneys Affected
- ■ Critical Cases (score > 75)
- ■ Oldest Unbilled Entry (days)

Attorney Inertia Table:

Columns:

- Rank** (by inertia score)

• Attorney** (photo + name)

• Inertia Score** (0-100, color-coded)

- ■ Red: 75-100 (Critical)
- ■ Yellow: 50-74 (Warning)
- ■ Green: 0-49 (Good)

• Unbilled Amount**

• Days Overdue** (average)

• Critical Cases** (count with score > 75)

• Action** (button: "Review & Bill")

Critical Cases Detail:

• Expandable section for each attorney

• Shows top 5 critical matters

• Matter name, unbilled amount, days overdue, score

Trend Chart:

• Line chart: Billing inertia over time

• Shows if problem is improving or worsening

AI Recommendations:

• Specific actions to take

• Priority order

• Estimated revenue recovery

Email Alert Status:

• "Last alert sent: [date/time]"

• "Next alert: Tomorrow at 9:00 AM"

• "Recipients: [list of partners]"

Tab 6: Practice Velocity

Purpose: Measure efficiency and speed

Velocity Metrics (Cards):

- ■ Average Time to Invoice (days)
- ■ Average Time to Payment (days)
- ■ Billing Cycle Time (days)
- ■ Realization Rate (%)

Efficiency Chart:

- Timeline visualization
- Work Done → Time Logged → Invoice Created → Payment Received
- Shows average days for each step

Matter Velocity Table:

- Matter type
- Average days from start to completion
- Average days to first invoice
- Average total duration
- Comparison to firm average

Attorney Efficiency:

- Table: Attorney / Avg Days to Bill / Avg Days to Collect
- Identifies fast vs. slow billers

Trends:

- Line chart: Velocity metrics over time
- Shows if firm is getting faster or slower

Benchmarks:

- Compare to industry standards
- Show firm's position

AI Insights:

- Bottlenecks identified
- Process improvement suggestions

- Best practices from top performers

PDF Export (All Reports)

When User Clicks "Export PDF":

PDF Generation:

- Professional document with firm branding
- LegalNexus header with logo
- Report title and period
- All data from current report
- Charts exported as images
- Tables with formatting preserved

PDF Structure:

- Cover page with report title
- Table of contents
- Summary page
- Detailed sections
- Charts and visualizations
- Footer with page numbers and "Generated by LegalNexus"

Download:

- Progress indicator during generation
- File downloads automatically
- Filename: "LegalNexus_[ReportType]_[Date].pdf"
- Typical size: 3-5 KB per report

After Download:

- Success message
- Option to email PDF

- Option to generate another report

---

14. Settings

Page: `/settings/departments` (Department Management)

Purpose: Manage practice areas/departments

Header:

- ■ "Departments" title
- ■ "New Department" button

Department List:

Each department card shows:

- Department name
- Department code (abbreviation)
- Number of attorneys assigned
- Number of active matters
- ✏■ Edit / ■■ Delete

Add/Edit Department Form:

- Department name (required)
- Department code (e.g., "CORP" for Corporate)
- Description
- Department head (dropdown: select attorney)
- Save / Cancel buttons

Page: `/settings/roles` (Role Management)

Purpose: Manage user roles and permissions

Header:

- ■ "Roles & Permissions" title
- ■ "New Role" button

Role List:

Each role card shows:

- Role name (e.g., "Partner", "Associate", "Admin")
- Number of users with this role
- Permission summary
- ✏■ Edit / ■■ Delete (can't delete system roles)

Add/Edit Role Form:

Basic Information:

- Role name (required)
- Description

Permissions (Checkboxes):

Matters:

- ■ View all matters
- ■ Create matters
- ■ Edit matters
- ■ Delete matters

Clients:

- ■ View clients
- ■ Create clients
- ■ Edit clients
- ■ Delete clients

Time Tracking:

- ■ Log time for self
- ■ Log time for others
- ■ Edit time entries
- ■ Delete time entries

Billing:

- ■ Create invoices
- ■ View all invoices
- ■ Edit invoices
- ■ Delete invoices

Reports:

- ■ View reports
- ■ Export reports
- ■ View billing inertia
- ■ View fee earner rankings

Administration:

- ■ Manage users
- ■ Manage roles
- ■ Manage departments
- ■ View audit logs
- ■ System settings

Buttons:

- ■ Save Role
- ■ Cancel

Page: `/settings/users` (User Management - hypothetical)

Purpose: Manage firm users

User List:

Each user card shows:

- ■ Photo
- Name
- Email
- Role badge
- Department
- Status (Active / Inactive)
- Last login
- ✏■ Edit / ■■ Delete

Add/Edit User Form:

- First name, last name
- Email (required, unique)
- Role (dropdown)
- Department (dropdown)
- Password (when creating new)
- Status (Active / Inactive)
- Photo upload

---

15. Audit Logs

Page: `/audit-logs`

Purpose: Complete activity history for security and compliance

Header:

- ■ "Audit Logs" title
- ■ Search logs
- ■ Date range filter

Filters (Left Sidebar):

- Date range
- User (dropdown)
- Action type (Created, Updated, Deleted, Viewed, Logged In, etc.)
- Module (Matters, Clients, Invoices, etc.)
- Entity (specific matter, client, etc.)

Audit Log Table:

Columns:

- Timestamp** (date & time, sortable)
- User** (photo + name)
- Action** (colored badge)

- ■ Created
- ■ Updated
- ■ Deleted
- ■ Viewed
- ■ Logged In

- Module** (Matters, Clients, etc.)
- Entity** (specific item, e.g., "Smith v. Jones")
- Details** (what changed)
- IP Address**

Action Details (Click any row):

- Expandable panel showing:

- Full action description
- Before/after values (for updates)
- User agent (browser/device)
- Session ID

Export:

- ■ "Export Logs" button
- CSV format
- Filtered by current view

Use Cases:

- Security monitoring (who accessed what)
- Compliance audits (complete trail)
- Troubleshooting (what changed when)
- User activity tracking

---

16. AI Assistant

Component: Floating AI Widget (Available on All Pages)

Purpose: 24/7 intelligent assistant

Appearance:

- ■ Circular button (bottom right corner)
- Gradient color (gold to orange)
- Vicktoria AI icon
- Subtle glow animation
- Badge: "Vicktoria" label on hover

When Closed:

- Small floating button
- Pulsing animation
- Click to open

When Opened:

Chat Window:

- Slides up from button
- Width: ~400px
- Height: ~600px
- Semi-transparent background
- Close button (×) top right

Header:

- ■ Vicktoria AI avatar (circular)
- "Vicktoria" name
- "Powered by Soul Logic" tagline
- Status: Online

Chat Area:

Message Types:

Vicktoria's Messages (Left-aligned):

- Avatar icon
- Light background bubble
- Text content
- Timestamp (hover)

User's Messages (Right-aligned):

- User avatar (if photo set)
- Darker background bubble
- Text content
- Timestamp

Suggestion Chips (Below Vicktoria's responses):

- Small clickable buttons
- Examples:

- "Show pipeline health"

- "Billing inertia report"

- "Top revenue risks"
- "Revenue forecast"
  - Click → auto-sends as message

Input Area:

Text Input:

- Large text box
- Placeholder: "Ask Vicktoria anything..."
- Auto-resize as typing
- Character count (if approaching limit)

Send Button:

- ➡■ Send icon
- Disabled if empty
- Loading spinner when processing

Features:

- Markdown formatting in responses
- Code blocks (if relevant)
- Links to relevant pages
- Inline charts (if applicable)
- "Copy" button for responses

Example Interactions:

User: "What's my revenue this month?"

Vicktoria: "Your firm has generated **R450,320** in revenue this month, which is **12% higher** than last month (R401,893). You're on track to exceed your monthly target of R425,000. ■

Would you like to see:

- [Suggestion Chip: Revenue by practice area]
- [Suggestion Chip: Top fee earners]
- [Suggestion Chip: Revenue forecast]"

User: "Show me billing inertia"

Vicktoria: "I found **R1,100,531.67** in unbilled time across **8 attorneys**. Here are the top 3 critical cases:

1. **Michael Chen** - R200,620 unbilled for 351 days (Score: 100) ■■
2. **Sarah Mitchell** - R149,250 unbilled for 347 days (Score: 100) ■■
3. **David Thompson** - R142,707 unbilled for 346 days (Score: 100) ■■

[Button: View Full Report] [Button: Generate Billing Packs]"

Conversation History:

- Scrollable chat history
- Persists during session
- "Clear Chat" option in menu

Context Awareness:

- Knows which page you're on
- Knows who you are (user role)
- References current data
- Understands follow-up questions

Error Handling:

- If AI unavailable: "I'm temporarily offline. Please try again."
- If question unclear: "Could you clarify what you mean by..."
- If no data: "I don't have any data for that period."

Navigation & Layout

Top Navigation Bar (All Pages)

Left Side:

- ■ LegalNexus logo (clickable → Dashboard)
- "LegalNexus Enterprise" text

Center:

- Current page title (breadcrumbs if applicable)
- Example: Dashboard / Companies / ABC Corp

Right Side:

- ■ Global search (magnifying glass icon)
- ■ Notifications (bell icon with badge if unread)
- ■ User menu (avatar, dropdown)

- Profile
- Settings
- Help
- Logout

Sidebar Menu (All Pages Except Login)

Collapsible sidebar (left side):

Menu Items (with icons):

- ■ Dashboard
- ■ Companies
- ■ Contacts
- ■ Sales Pipeline
- ■■ Matters
- ■ Lightning Path
- ■ Legal Documents
- ■ Time Tracking

- Timesheet
- Billing Packs

- ■ Invoicing
- ■ Financials

- ■ Reporting (LegalNexus)
- ■■ Settings

- Departments
- Roles
- Users (if admin)

- ■ Audit Logs

Each menu item:

- Icon + text label
- Hover: highlight background
- Active page: bold + colored background
- Collapsible submenu (if applicable)

Bottom of Sidebar:

- ■■ Collapse/Expand toggle
- ■ Dark mode toggle (future)
- ■ Help documentation link

Responsive Design Notes

All pages are responsive:

- Desktop (>1200px):** Full layout with sidebar
- Tablet (768-1199px):** Collapsed sidebar, expandable on click
- Mobile (<768px):** Bottom navigation bar, hamburger menu

Touch-Friendly:

- Large tap targets (buttons, links)
- Swipe gestures (where appropriate)
- Mobile-optimized forms

Common UI Elements

Loading States

- Spinner icon
- "Loading..." text
- Skeleton screens (for cards/tables)

Empty States

- Icon + message
- Call-to-action button
- Examples:

- "No matters found. Create your first matter?"
- "No invoices yet. Ready to bill your first client?"

Error States

- ■■ Error icon
- Error message
- Troubleshooting tips
- "Try Again" button

Success Messages

- ■ Green toast notification
- Auto-dismiss after 3 seconds
- Examples:

- "Matter created successfully"
- "Invoice sent to client"

Confirmation Dialogs

- Modal overlay
- Question + explanation
- "Confirm" and "Cancel" buttons
- Examples:

- "Delete this matter? This action cannot be undone."

Form Validation

- Real-time validation
- Red borders on invalid fields
- Error messages below fields
- Disabled submit until valid

Summary

This page inventory covers **all 16 major sections** of LegalNexus Enterprise:

1. ■ Login
2. ■ Dashboard
3. ■ Companies (List, Detail, Form)
4. ■ Contacts (List, Detail, Form)
5. ■ Sales Pipeline (Kanban, Detail, Form)
6. ■ Matter Management (List, View, Form)
7. ■ Lightning Path (Guided workflows)
8. ■ Legal Documents (List, Viewer)
9. ■ Time Tracking (Timesheet, Entry Form)
10. ■ Billing Packs (List, View, Generate)
11. ■ Invoicing (List, View, Form)
12. ■ Financials (Overview, Transactions, Accounts, Projections)
13. ■ Reporting Dashboard (6 reports + PDF export)

14. ■ Settings (Departments, Roles, Users)
15. ■ Audit Logs
16. ■ AI Assistant (Vicktoria - available everywhere)

Total: 30+ individual screens/pages with complete functionality described.

This document provides a visual blueprint of the entire LegalNexus user interface.

Document Version: 1.0

Date: February 2026

Status: Complete Page Inventory