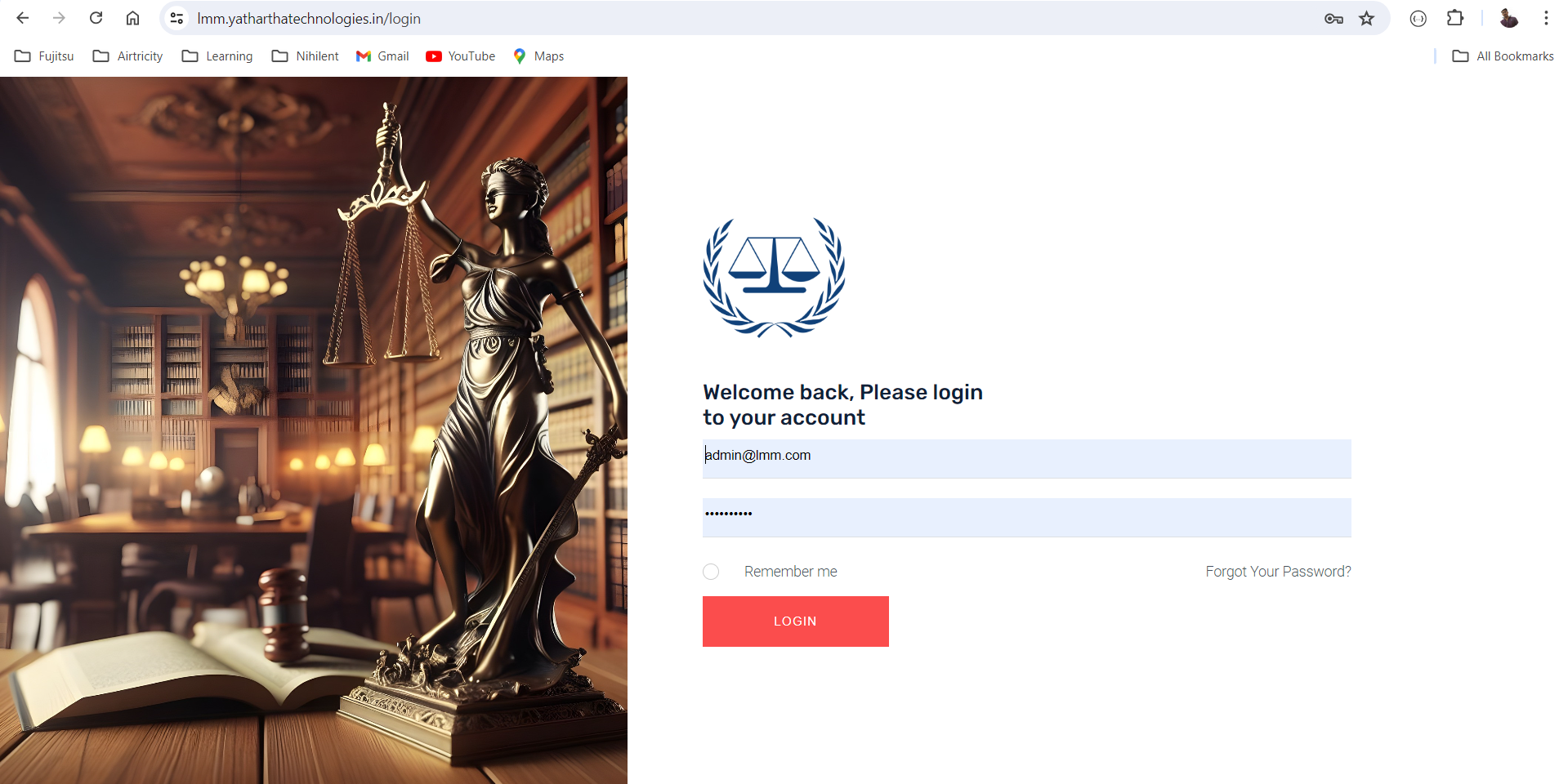
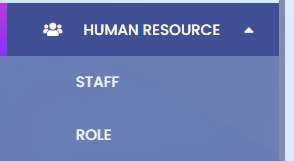
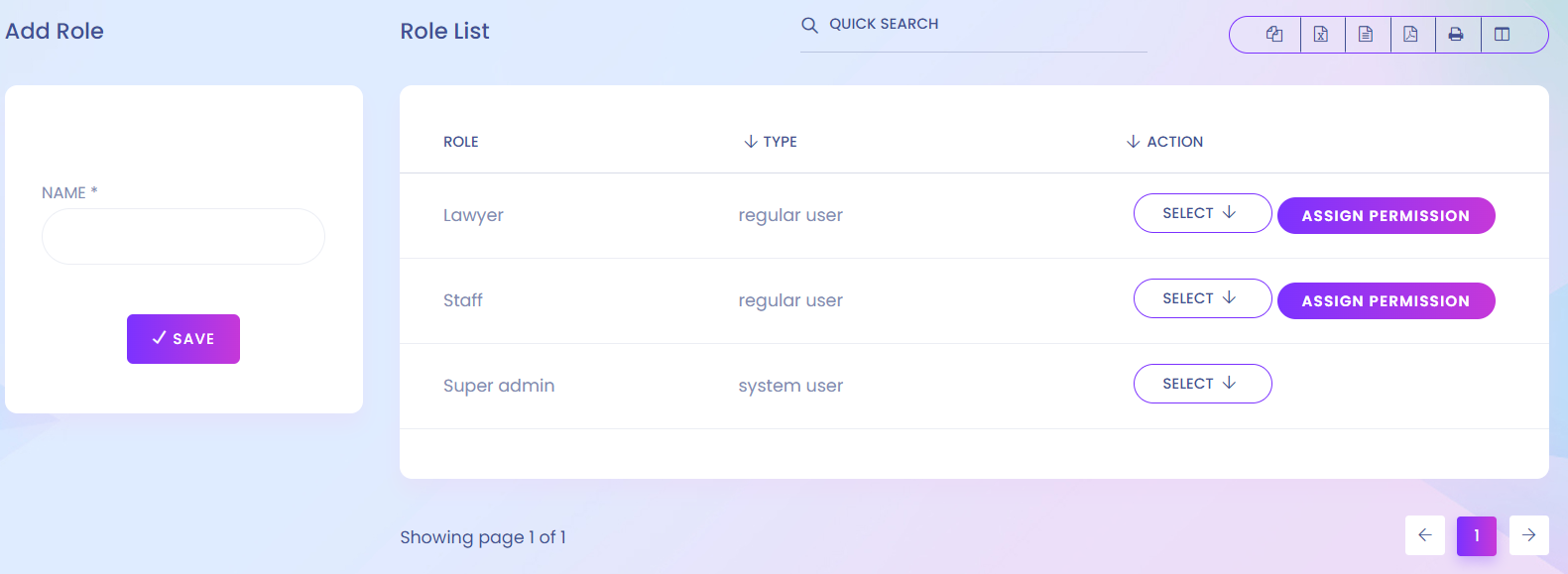
**System –**

1. **Login:**
2. Login Authentication and Role based Authorization
3. System Admin (able to view/edit all records), Law Firm Admin (able to view/edit only Law Firm records) and Law Firm Staff (created by Law Firm Admin – able to view/edit only Law Firm records - restricted to view payment details of the respective Law Firm)



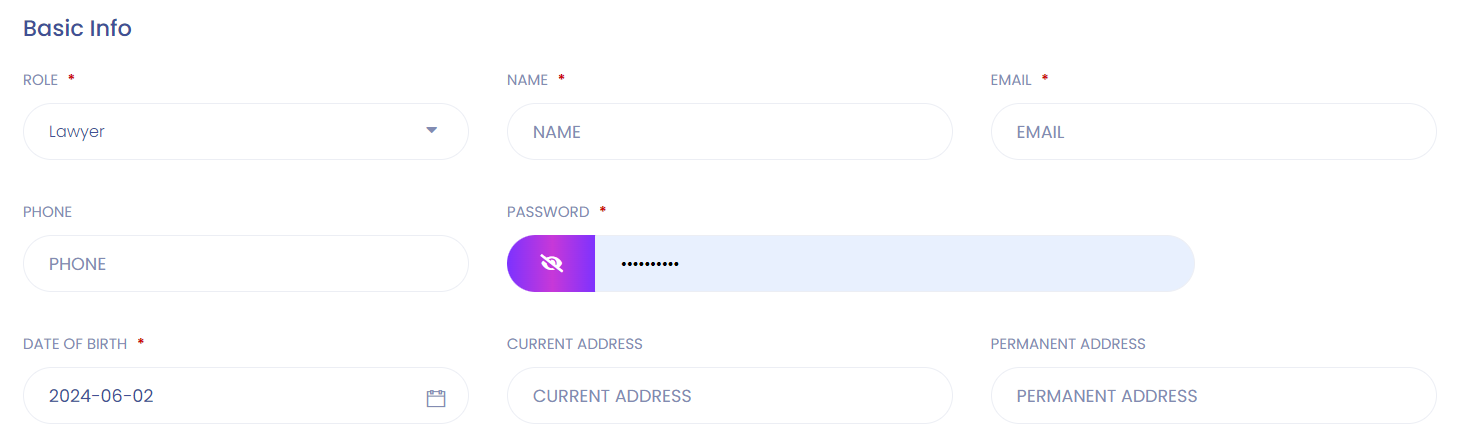
1. System Admin Role will not be available for creation/registration through Application. Refer same as your current Advocate Management System (replicate Staff and Role from Human Resource Menu)

1. Create User: Simple page to create/register user with below fields.

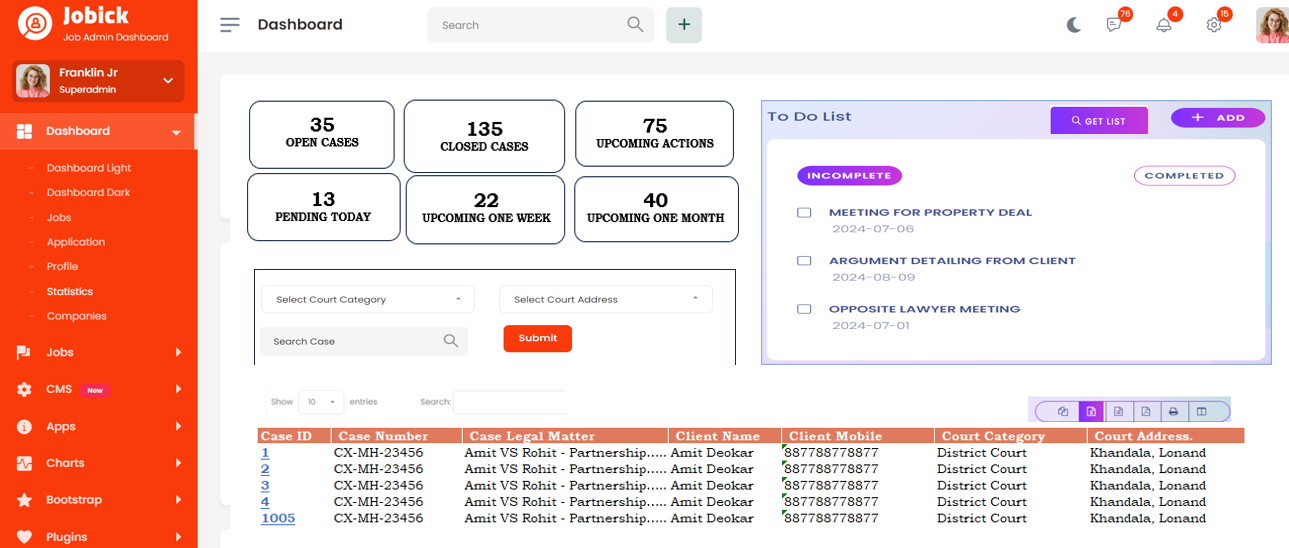
|  |  |
| --- | --- |
| * Username (EmailID) | * FirstName and Last Name of the user |
| * Password (stored as encrypted in DB) | * Confirm Password |
| * Mobile Number | * Role (Law Firm Admin, Law Firm Staff) |
| * Law Firm Address | * Law Firm Name |
| * Law Firm Logo Image | * Status (Active/Inactive) |

Refer below Image for sample:

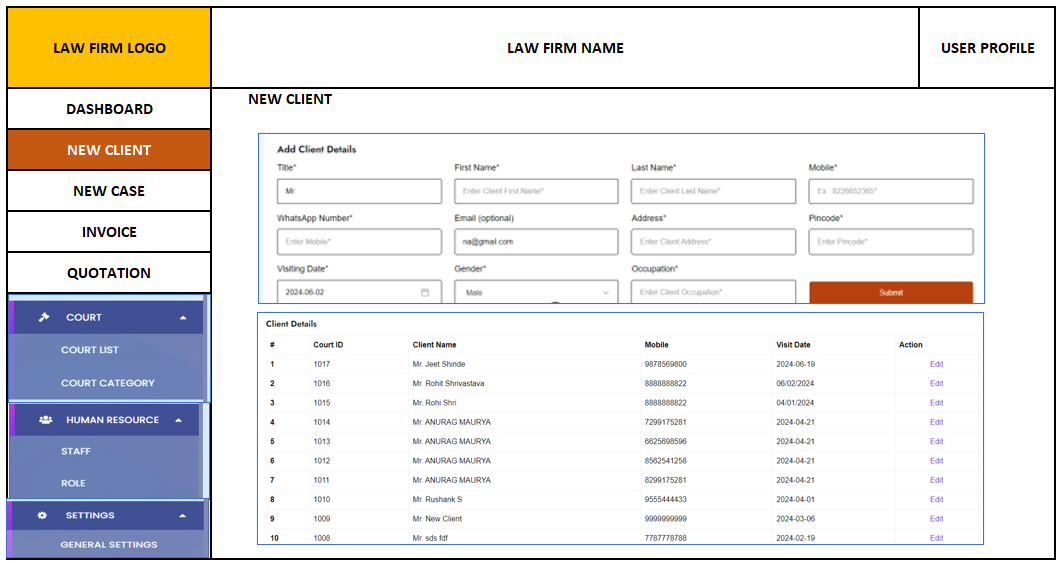


1. Ability to change Password and Forgot Password (Email ID link in case forgot password
2. IF user credentials are not correct, message displaying "User credentials do not match with system records" is shown.
3. IF user is inactive, message displaying "User is not active, please contact Admin" is shown.
4. Law Firm Logo mage will be displayed on successful user login.
5. **Dashboard:**

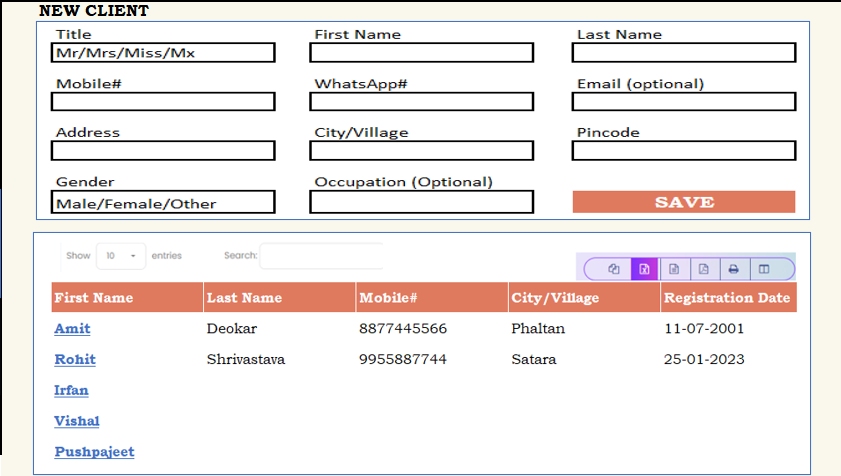
* 4 components on Dashboard: Statistics, To Do List, Search Box and Data Table
* Onclick of statistics, Data table will get filtered.
* Columns for Data table should be Case ID, ~~Case Legal Matter,~~ Client Name, Client Mobile, Opponent Name, Case Number, Court Category, Court Address. Table should be sorted by Case ID descending. [Follow the same sequence to display in Data table. Blank Values should be displayed as “*Not Available*”]
* On click of Case ID, redirect to Case Details and open up the Tabs filled with all Case details.



1. Summary of Total Open cases, closed, cases and Pending Actions will be displayed. Pending Actions breakup – Today’s, Upcoming Weeks, and Upcoming Months will be displayed.
2. Filter to search case based on Client Name, Case Description & Case Number. Dropdown to select Court details for Search is available.
3. Simple Grid to display records/enquiries/cases sorted by Case ID descending. Pagination of 10 records per page. Export to excel option for Grid records.
4. On click of Open Cases, Closed Cases, Pending Cases >> Below Grid will get auto filtered and display only respective details.
5. Default the Grid will display all Open cases sorted by most recent cases (descending)
6. On click of Statistics Count, Filter the Data table on Dashboard as per the Count.
7. **New Client Entry:**
8. Creating new client functionality needs to be added in side menu bar. It needs to contain all the fields to add new client as per below screen shot. ~~Client ID will be generated once a new Client entry is created~~.
9. Grid to display Client details sorted descending by Registration/Visit date will be displayed below Add New Client details field.



NEW CLIENT DESIGN FIELDS ALIGNED and BOOTSTRAP TABLE displayed



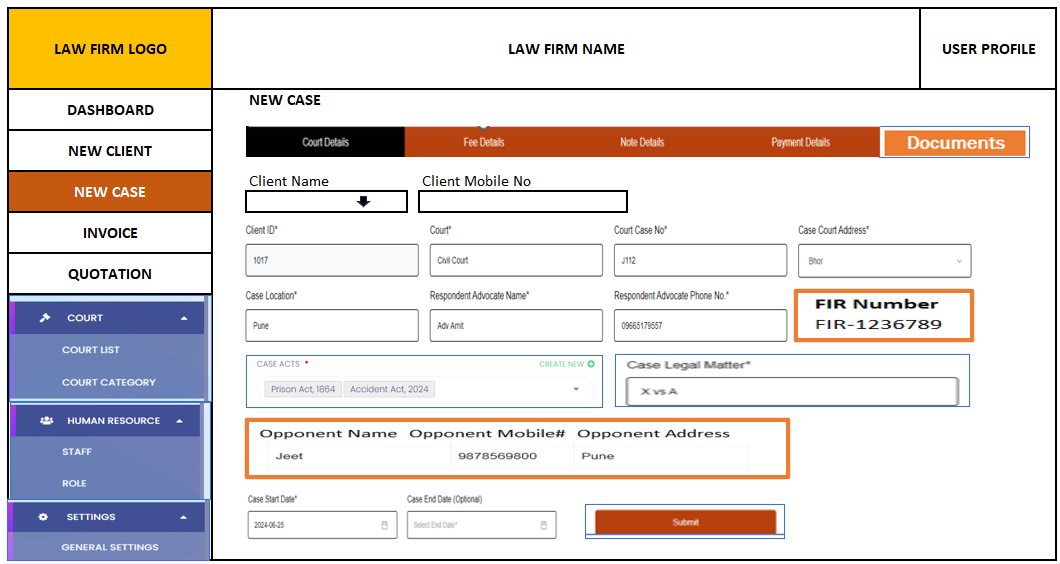
2 components: Add New Client, Data Table to show Client list.

1. Columns for Data table should be First Name, Last Name, Mobile#, City/Village, Registration date, Action.
2. On click of First Name Edit icon (new column ‘Action’ at the end), details should be filled up in the fields and available for modification.
3. When the Client details get saved to database, Creation datetime will get saved. Same will be available and displayed under Registration Date. Table will be sorted by Registration date descending.
4. **Case Details:**

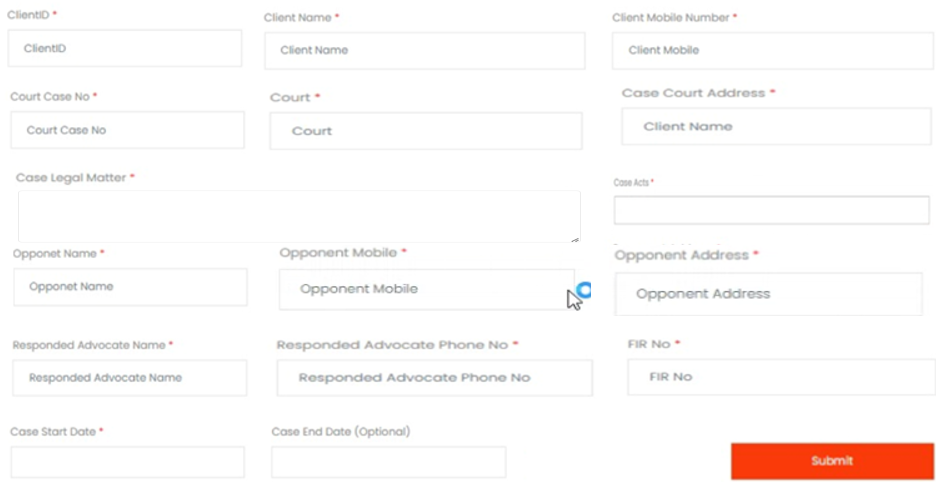
Tab Names & Sequence must be: Case Details >> Case Fees >> Case Notes/Actions >> Case Payment >> Case Documents

1. **Court/Case/ Opponents Details:**

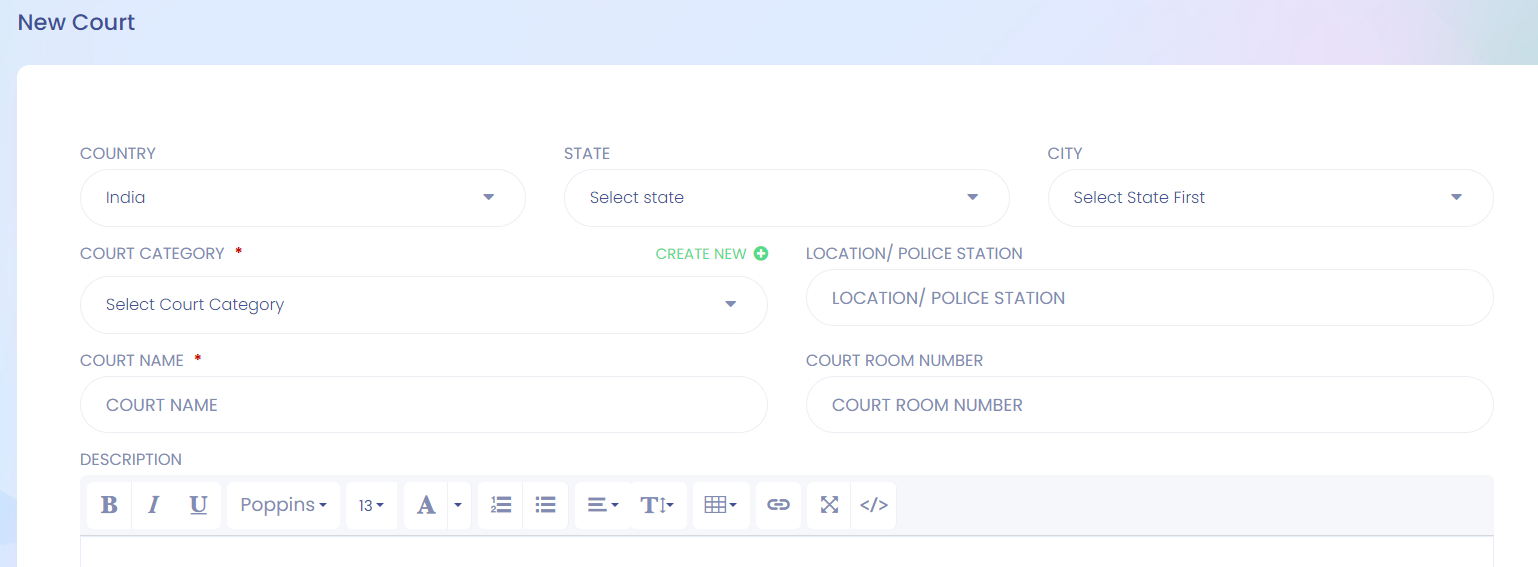
* Once Client details are saved >> next option for Court/Case detail entry are made available.
* We need to give dropdown to select client. When we select client from the drop-down list First Name & Last Name, Mobile number will auto populate.
* First Name and Last Name will be single field displayed as dropdown and Mobile number will auto populate.
* Missing opponent details to be added – Add three fields opponent Name, opponents Mobile# and opponent Address.
* Court dropdown will populate Court Category value and Court Address dropdown will populate Court List values from Court Menu.
* Need to add FIR number field (Optional) to capture FIR#
* If the user enters Close Date >> Notification to show confirmation closure message should be displayed.
* All Payment received, good to close the Case.
* Payment is pending, do you still want to Close the Case.



NEW DESIGN: FIELDS ALIGNED PROPERLY

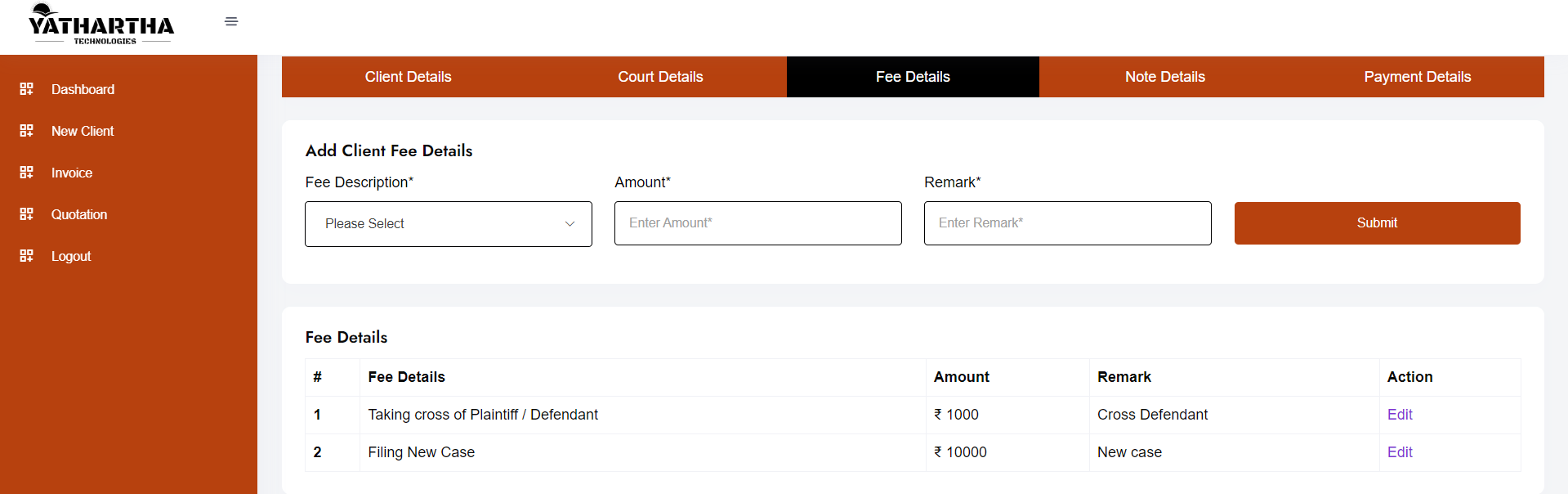


* Client ID replace by **Case ID** – Default displays the next Sequence number, auto populated. Case ID get saved to database on click of Submit button along with Case Creation date.
* Once Case Id is generated, all remaining 4 tabs will be enabled.
* Client Name is a dropdown, value is combination of First Name + Last Name (Show all Clients captured from New Client Menu) Client Mobile Number will be auto filled on selection of Client Name.
* ALL FILEDS ARE OPTIONAL EXCEPT Client Name, Case Legal Matter and Opponent Name. Client ID and Client Mobile Number gets auto filled.
* Once Case details are entered (first tab), all rest of the tabs will be enabled. No need to provide Previous and Next button.
* Ability to Add Court details (replicate Court Menu)

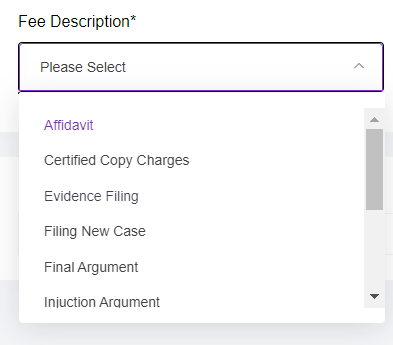
 

1. **Case Fees:**

* Simple Fields entry to add Fee details and a Grid to show all details at the bottom.
* Configuration required to hide Fee details from Law Firm Staff role.

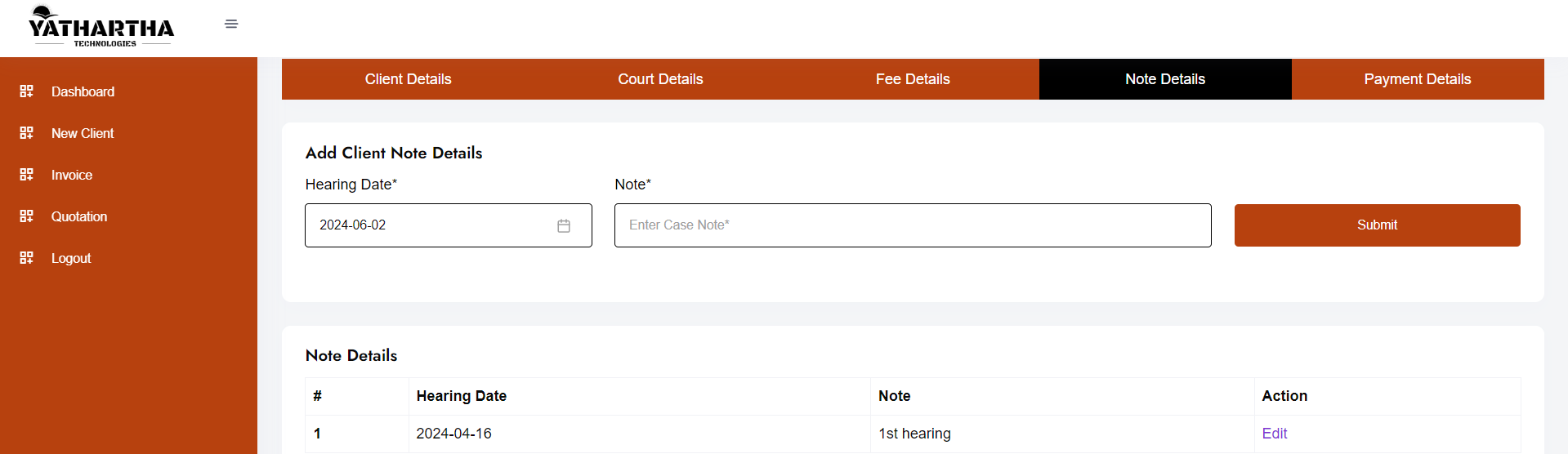


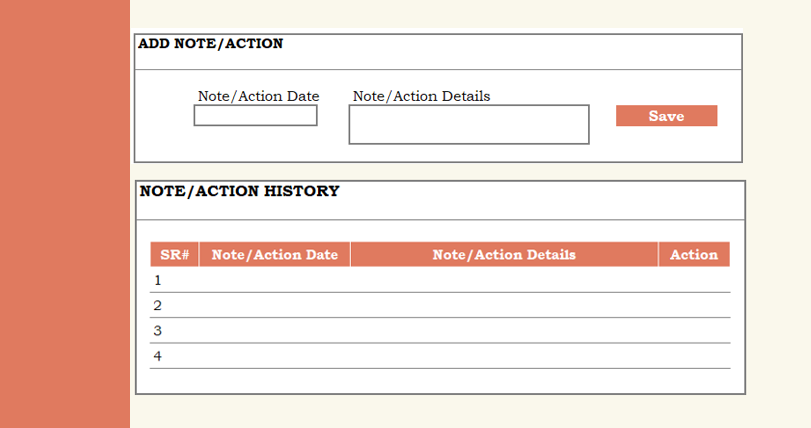
* Fee description is Dropdown list – Need ability to add headers for Fee description. (Add button above Fee description to add New Fee details)



1. **Case Notes/Actions:**

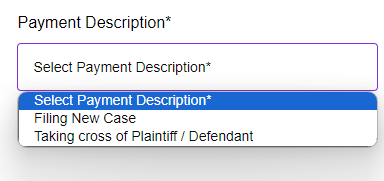
* To maintain case history details – ability to add Notes ~~hearing~~ Action date wise.
* Case Notes/Actions should be a Text area



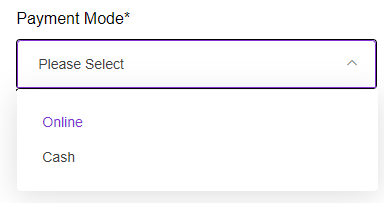


1. **Case Payment:**

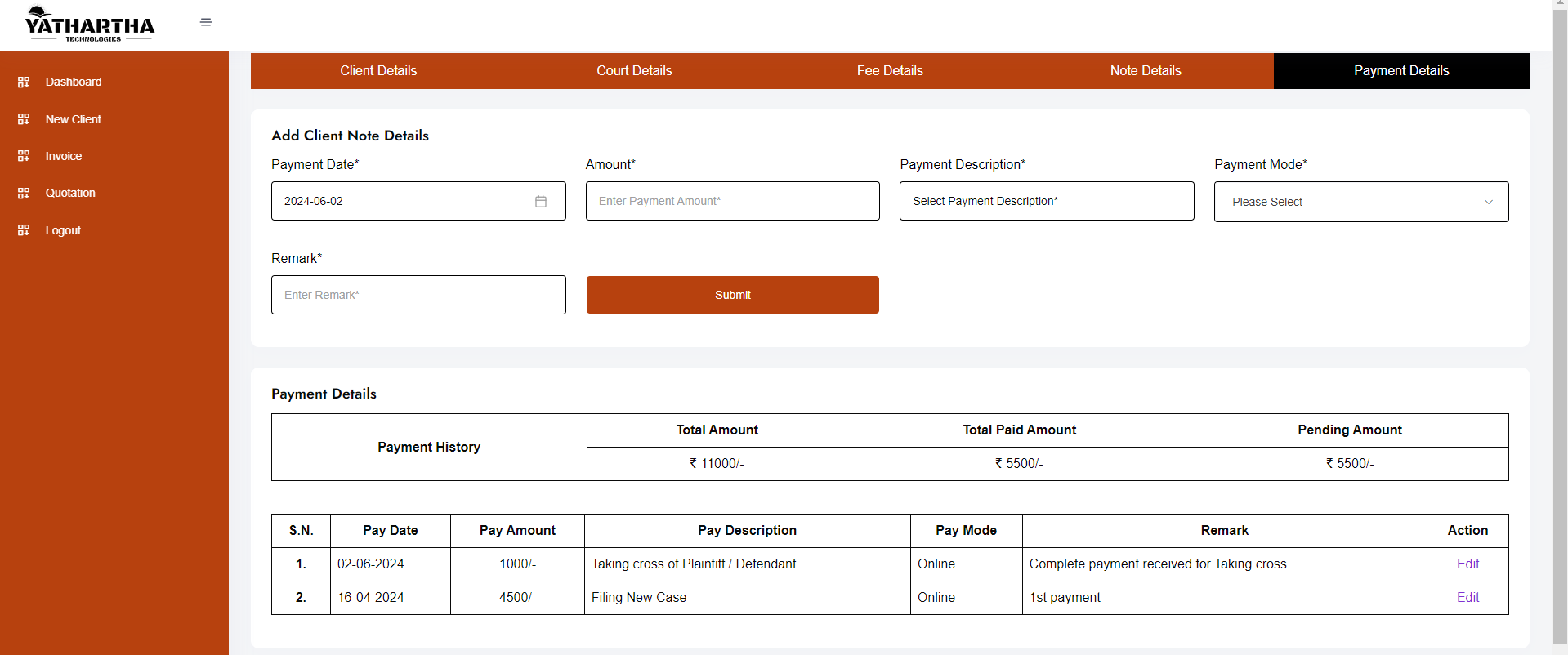
* Ability to add payment received against the Fees (payment description)



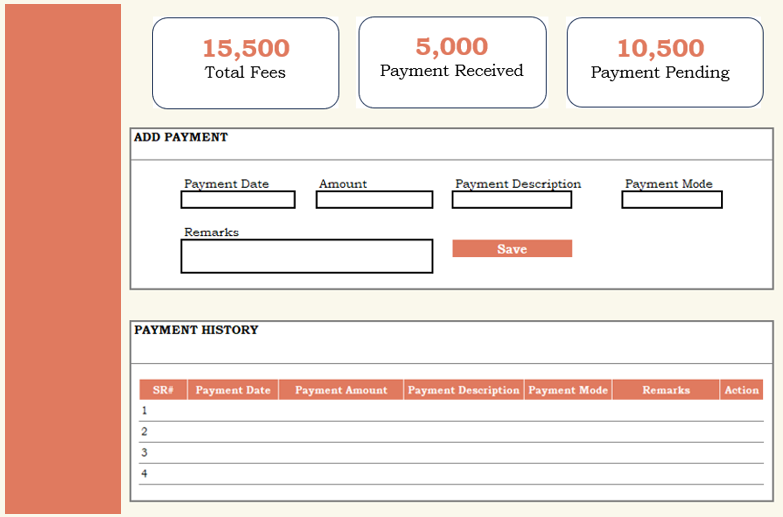
* Select from multiple Payment modes (Online, Cash, Cheque, Credit/Debit Card)



* Grid to display Payment history and also show Total Fees, Total paid and Total Pending
* Configuration required to hide Fee details from Law Firm Staff role.

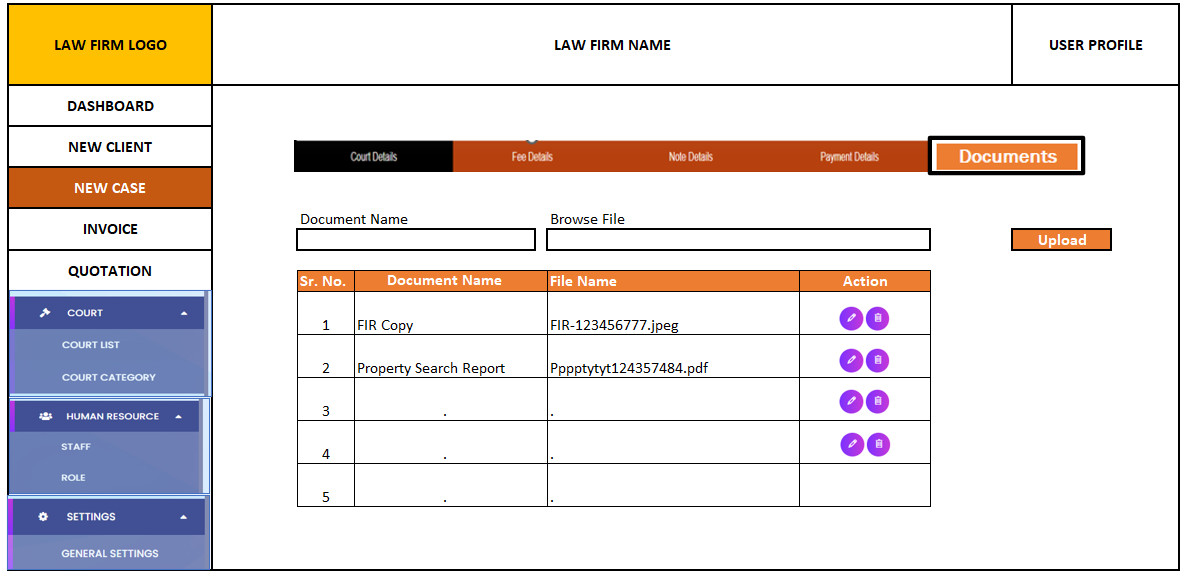


NEW DESIGN DISPLAY:

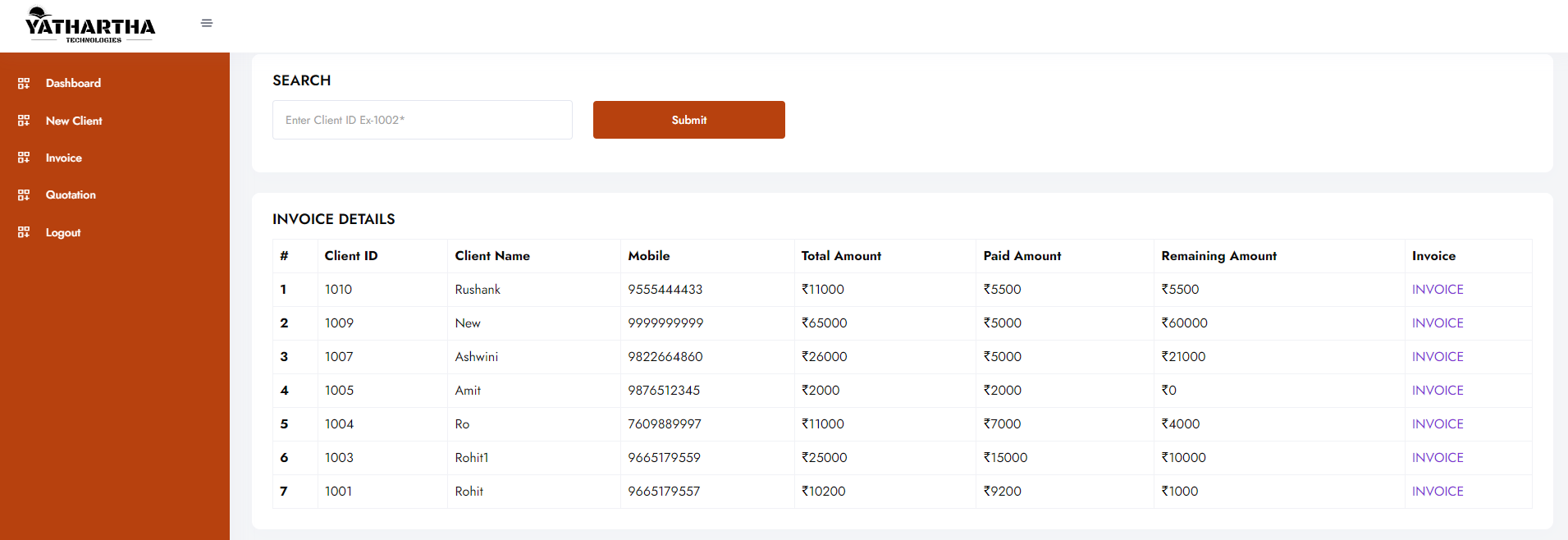
****

1. **Case Documents:**

Documents Menu under New Case – allowed formats – pdf/jpg/jpeg/doc >> Grid to display Uploaded Docs and download option.



1. **Invoice Details:**
2. Ability to Search & view all Invoices.

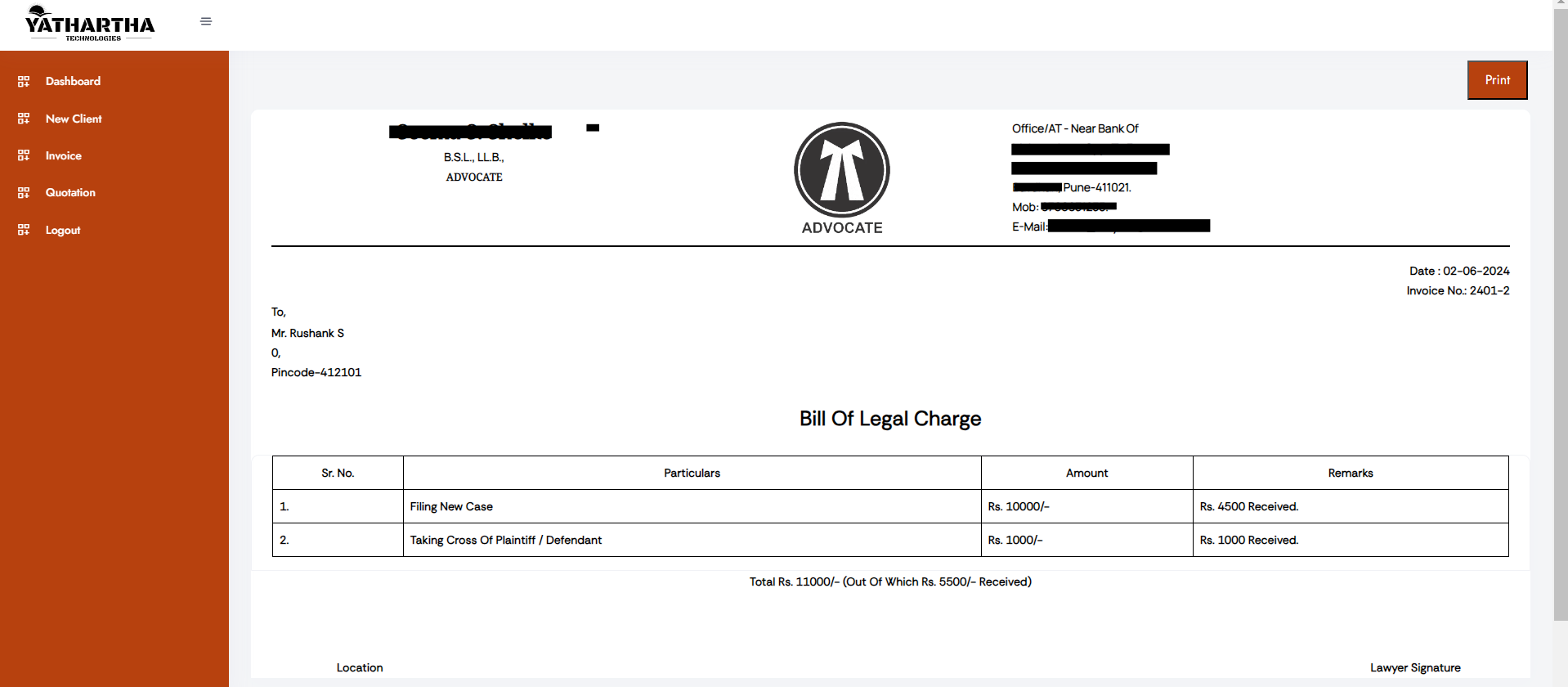


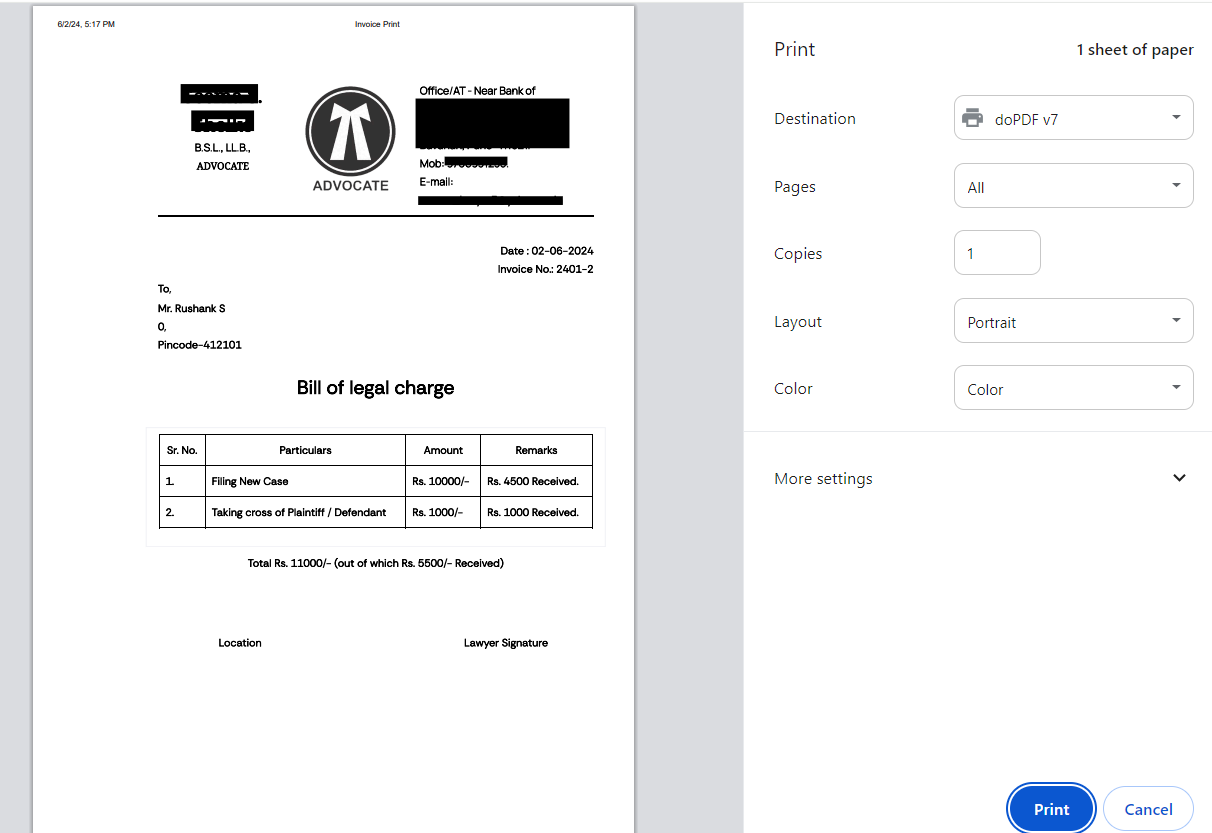
1. Ability to view single Invoice, print and email.

Invoice Number must be captured and should be unique for each Print – Invoice Number format is ‘CaseNumber-AutoSequenceStartingFrom1’

Example: If case number is 2304 and it is first print – Invoice number will be 2304-1 >> Next prints will follow 2304-2, 2304-3 and so on.

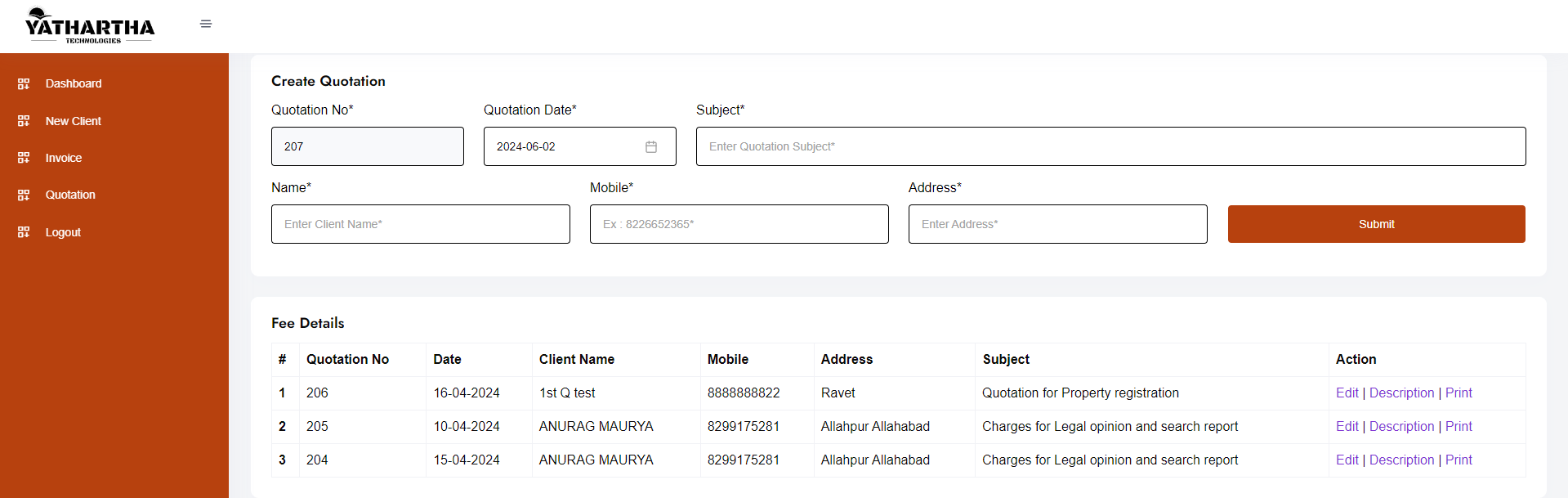
1. Invoice Date should always display current date.
2. Need ‘Law Firm Admin Name’ instead of ‘Lawyer Signature’ on print page



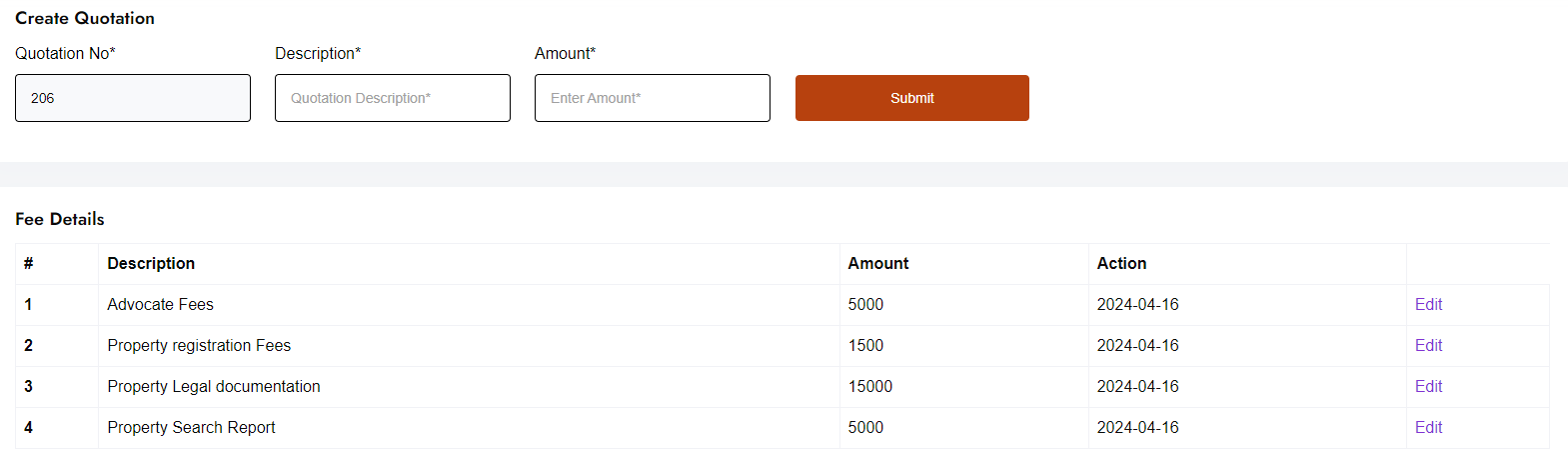


1. **Quotation:**

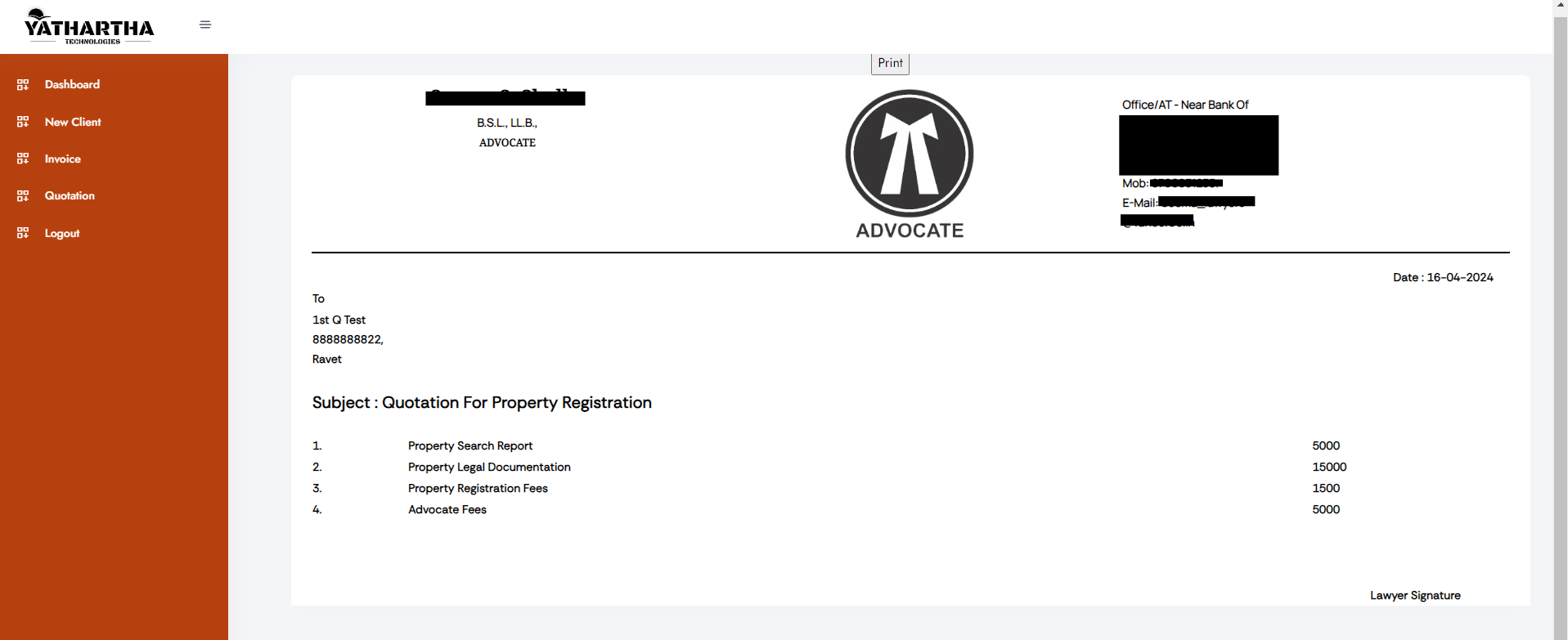
* Ability to create quotation for random enquiries.
* Latest quotation number will auto populate in Quotation# field.
* Today’s date will default show in Quotation date field

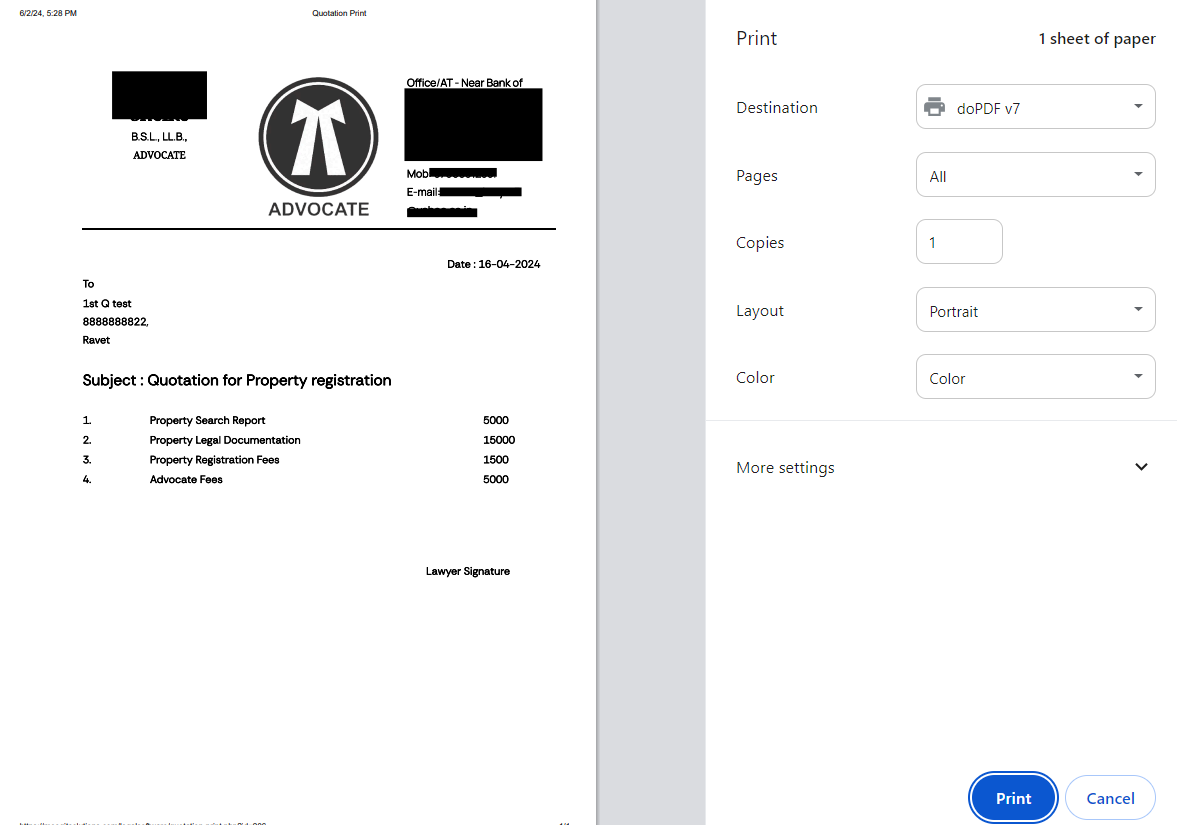


* Ability to add/edit Description and Amount to create quotation.



* Ability to view, print and email quotation
* Need ‘Law Firm Admin Name’ instead of ‘Lawyer Signature’ on print page



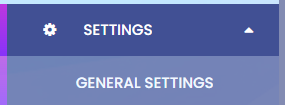


**NOTES:**

1. All Application needs to be built in Bookman Old Style font
2. Colour combination of the application must be configurable – initial application must be in below combination:

* Application Background: #faf8ec
* Menu Background/ Button: #E07A5F
* Menu Hover: #[e6947e](https://www.color-hex.com/color/e6947e)

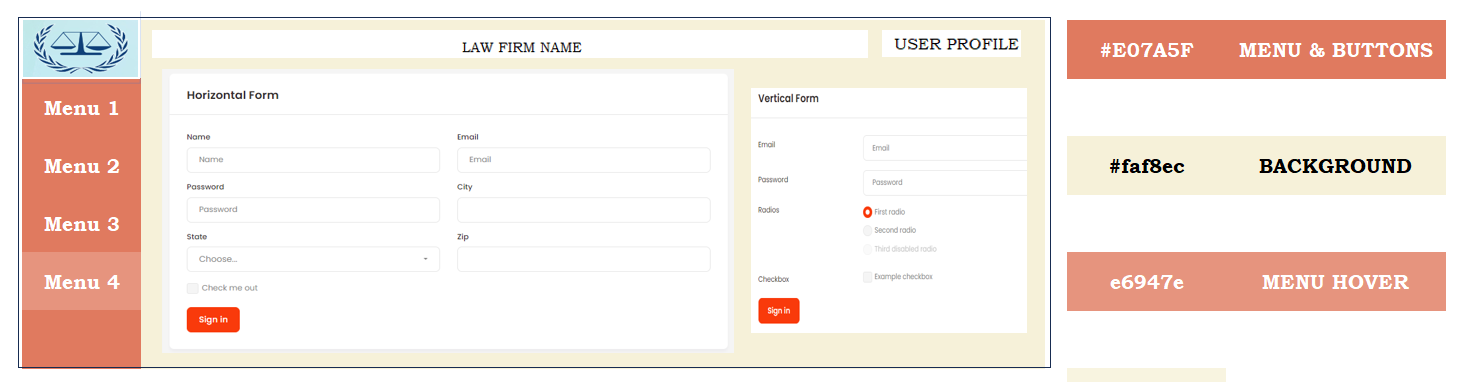
1. All date formats should be displayed in DD/MM/YYYY format
2. Application must be responsive – easily accessible on mobile and handheld devices
3. Configuration to add Copywrite text for application, favicon image, Name & Logo for Application. (similar to General Settings configuration)



1. Similar hosting configuration is expected like provided for sample Advocate Management System project.
2. Print Should always have a left side Margin as per given screenshots for Invoice and Quotation.

**GENERAL DESIGN COMMENTS:**

Sample Menu, Background, Menu Hover design:

****

**MENU DESIGN COLOURS:**

Menu Background / Primary Colour: E07A5F Menu Font Colour: White

Menu Hover: #e6947e

Application Background: #faf8ec

**Table Design format must be:**

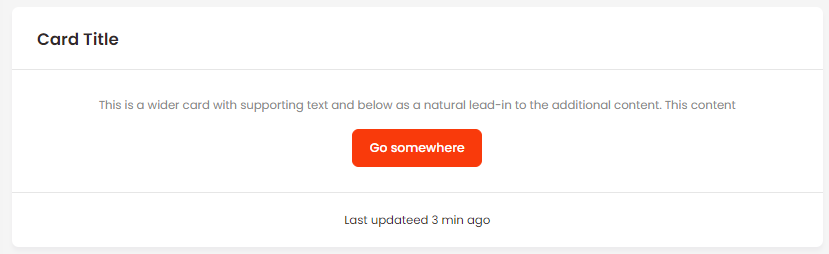
Header Background: E07A5F Header Font Colour: White

Data Background: White Data Font Colour: Black

Hover data row: #faf8ec

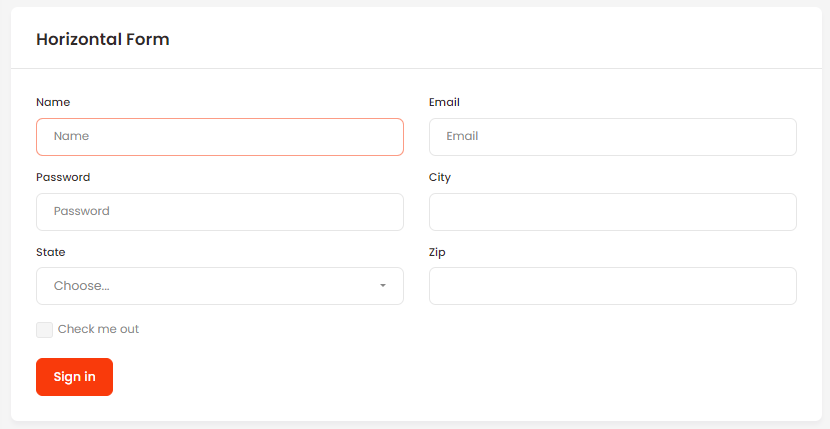
**Rest All Tabs should follow the same Table design and Colour design.**

**Each Card should have a Title and Content, example:**

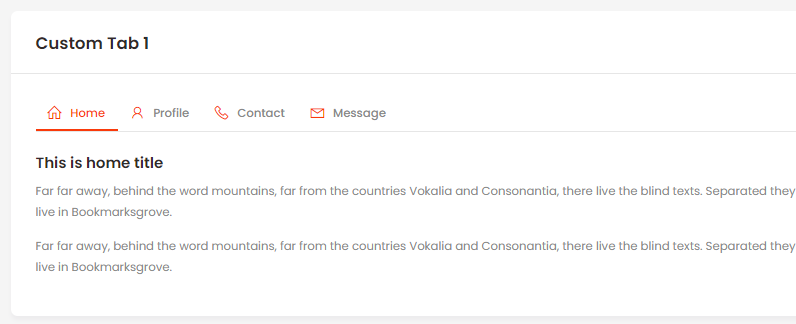
****

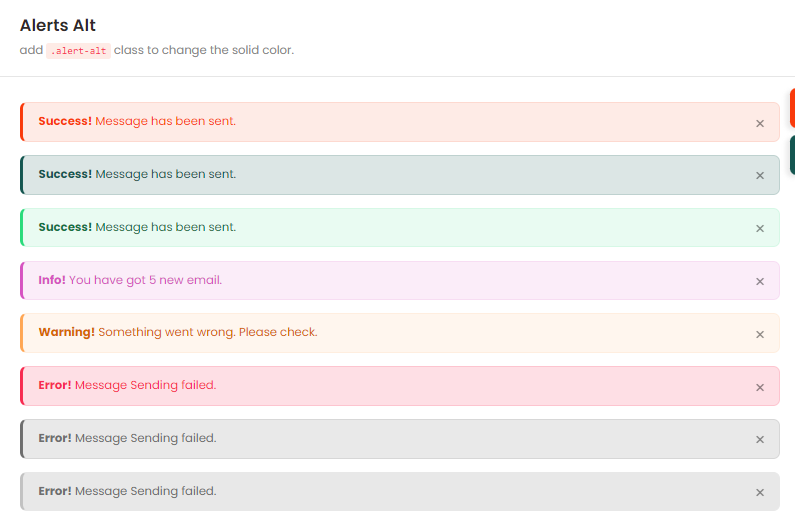
**All Form Inputs should have round edges, currently they are sharp edges.**

**Example:**

****

**Tab used should be as below, currently all tabs have same colour and doesn’t work on hover. Only the Selected Tab should use Primary Colour #E07A5F**

****

**Successful/Failure Notifications on entries/submission/Login/Logout.**

[**https://lmm.yatharthatechnologies.in/login**](https://lmm.yatharthatechnologies.in/login)

**Username:** [**admin@lmm.com**](mailto:admin@lmm.com)

**Password: Admin@2024**