**Lawfully Pro Dumbo**

* Trouble Shooting
  + Not receiving invite emails
    - Lawfully Pro cannot send an invitation to an email address that is already associated with an existing Lawfully Pro account. Please delete the existing account first, then add the member again.
* Subscription Types
  + Basic: $40 / month
    - 100 active cases
    - Case tracking for USCIS, NVC, DOL, and EOIR
    - Automated email notifications
    - USCIS visa processing times trends
    - Visa bulletin trends
    - Bulk case upload
    - Client portal for real-time case updates
  + Premium: $100 / month
    - 500 active cases
    - Case tracking for USCIS, NVC, DOL, and EOIR
    - Automated email notifications
    - USCIS visa processing times trends
    - Visa bulletin trends
    - Bulk case upload
    - Client portal for real-time case updates
    - Lawfully Pro integration with Email
    - Documents (I-797) upload
  + Growth: $400 / month
    - 2,500 active cases
    - 500 active cases
    - Case tracking for USCIS, NVC, DOL, and EOIR
    - Automated email notifications
    - USCIS visa processing times trends
    - Visa bulletin trends
    - Bulk case upload
    - Client portal for real-time case updates
    - Lawfully Pro integration with Email
    - Documents (I-797) upload
  + Enterprise: Customized Price
* Free Trial
  + 14 days
* Settings Page
  + Organization Name update
  + Organization Logo update
  + User name update
  + Password change update
  + Delete account (Only super admin)
  + Member invite
    - Multiple invite at once via email
    - Lawfully Pro has unlimited seat for members
    - Member types
      * Super Admin: The primary account holder of the organization with full permissions. They can invite and remove users, manage member permission levels, control case visibility, and access all cases. Only member type that can delete account.
      * Admin: Members with the same permissions as the Super Admin.
      * User: Cannot invite other members or modify permissions.
  + General Settings
    - All members are automatically selected as assignees by default for newly added cases
      * Assignee: Only assignees linked to cases in Lawfully Pro will receive case updates by email.
    - Completed cases (*Approved*, *Denied*, etc.) are inactivated after 60 days by default
      * Active cases: count toward the plan's case quota and are continuously tracked from government agency sites (USCIS, DOL, NVC). The status of these cases will be regularly updated, and alerts can be set for various case events to receive email notifications.
      * Inactive cases: do not count toward the plan's case quota, as these cases have completed their processes with statuses such as *Approval*, *Denial*, *Withdrawal*, etc. No further status updates will be provided. However, visa bulletin and other alerts can still be set to receive email notifications.
* Adding Applicants
  + Name is the only required field
  + The rest(email address, phone number, and tags) is optional
  + One or more tags can be assigned to the applicant
* Adding Cases
  + Lawfully Pro can track EOIR, USCIS, NVC, DOL cases
  + When adding a case, case number (receipt number) is required
  + One or more tags can be assigned to the case
* Detailed case view
  + Case status history (only for USCIS cases)
    - To help you better understand your case progress, we provide two types of historical updates, sourced from Case Status Online ([egov.uscis.gov](https://egov.uscis.gov/)) and myUSCIS ([my.uscis.gov](https://my.uscis.gov/)). These messages might look similar, especially if they occur on the same date, but they serve complementary purposes.
  + Processing time
    - Processing time and trends will be displayed only after selecting the form category, service center, and the date filed (auto-filled).
  + Visa Bulletin
    - The Visa Bulletin alert—including notifications for AOS (I-485) eligibility and related trends—will be displayed only after selecting the form category, country of origin, and priority date.
    - The Visa Bulletin will be automatically updated whenever USCIS releases a new official bulletin.
  + Setting Other Alerts
    - You can configure alerts and receive email notifications for key updates, including cases exceeding normal processing time, AOS eligibility, RFE response deadlines, interviews, and other critical events.
  + Client Portal
    - You share the client portal with a single link, providing full case details and keeping your clients informed—helping you stay ahead and proactive.
  + Auto Notifying Clients
    - If you’d like case status updates to be automatically shared with your clients, please add their email addresses.
    - No Update Update: When users enable the **“Periodic Update for No Status Change”** option, a modal will automatically appear, allowing them to configure the frequency and timing of these notifications.
* Cases Bulk Upload
  + Download the example template and fill in the required information. Only Applicant Name and Case Number (Receipt Number) are mandatory fields.
  + Bulk upload supports USCIS, DOL, and EOIR cases only. NVC cases are not supported, as Non-Immigrant Visa types may require additional fields such as Passport Number and Surname of the applicant.
* Document Upload feature (i.e. I-797)
  + The 'Document Upload (e.g., I-797)' button is positioned to the left of the 'Bulk Upload' button
  + When users click this button, they will be directed to a page titled 'Upload Documents (i.e. Receipt Notices or I-797s)', which provides functionality for uploading documents
  + The maximum file size for documents uploaded at once is limited to 20MB
  + **How it works?**
    - New Applicant & New Case: Lawfully Pro will automatically add the applicant and case, extracting relevant information from your documents.
    - Existing Applicant & New Case: If the applicant already exists in Lawfully Pro but the new case’s document shows a different name, Lawfully Pro will suggest name options based on existing records for you to select. (For example, if Lawfully Pro has "Jon" but the new case document shows "Jonathan" for the same person, the system will recommend using the original name you entered.
    - Existing Applicant & Existing Case: If both the applicant and case already exist, Lawfully Pro will retain your previously entered information and update only new or missing data. (For example, if the name in the document differs from the one in Lawfully Pro for the same case number, the system will continue showing the original name you entered.
    - Scenario 1: New Applicant / New Case
      * Case Number and Applicant Name will be newly extracted from the documents
    - Scenario 2: Existing Applicant (a scanned applicant’s name closely matches an existing applicant already added in Lawfully Pro) / New Case
      * Case number will be newly extracted from the documents
      * When a scanned applicant’s name closely matches an existing applicant already in Lawfully Pro, two fields will be displayed for the user:
        + Scanned Name
        + Matching Name
      * Users can select matching name to use or continue using the scanned name, and there will be a message for each situation
        + Scanned name will be used
        + Matching name will be used
    - Scenario 3: Existing Applicant / Existing Case
      * Since the case number already exists in the system, all previously saved information will be pre-filled, allowing users to review and update any new or additional details as needed
        + If the Nationality field exists, it will display the original scanned country. For example, even if the country was categorized as “Other” in the Visa Bulletin modal, the Nationality field will be pre-filled with the scanned country to avoid showing “Other” to the user.
      * The matching name will also be retrieved and automatically selected by default, accompanied by the message: Matching name will be used. To use scanned name, select “use scanned named”.
    - Once the Submit button is clicked, all confirmed data will be applied to the user's Lawfully Pro account.
* Dashboard
  + Task Management Tab
    - Action Required Tab
      * Search & Assignee filter functionality
      * Action Type categorization with Expand / Collapse functionality & Display the number of cases associated with each action category.
        + RFE
        + Interview
        + Biometric
        + Outside Normal Processing Time
        + AOS Eligible
      * Detailed information of the case to be displayed when the action type is expanded
        + Applicant name
        + Case type
        + Case number

Link to open the case detail view in a new browser tab

* + - * + Assignee
        + Pending days
        + Action List

Display chips for 'To Do', 'In Progress', and 'Done',

When the chip is clicked,

The modal shows the number of completed actions out of the total number of actions when they are clicked

Default action item to be listed with checkbox

RFE: RFE Respond

Interview: Notify Client

Biometric: Notify Client

Case Inquiry Eligible: Submit Case Inquiry

* + - * + Complete button

When a user clicks the Complete button, the item (row) will be moved to the Action Completion tab, which will be explained in detail below.

If the user clicks the Complete button without marking any action items, the current date and time at the moment of clicking should still be recorded as the completion timestamp for the action

* + - Action Completed Tab
      * Search & Assignee filter functionality
      * List of all cases that have been marked as Completed, displaying detailed information for each case (To enhance usability and reduce clutter, display a maximum of 5 cases initially. If there are more than 5 cases, include a “View more” button that allows users to expand the list and view all completed cases).
      * Each item (row) must include
        + Applicant name
        + Case type
        + Case number

Link to open the case detail view in a new browser tab

* + - * + Assignee
        + Pending days
        + Completed

[Assignee name], [Completed date]

When this button is clicked, a section for Action history should be opened on the right side of the screen

Actions will be listed from newest to oldest, based on their date

Date, Assignee, Action Name

* + - * + Back to Action (A button to move the case back to the Action Required tab)

When the user clicks this button, the case will return to the Action Required tab, and the history of completed tasks should be preserved — previously completed tasks will have their checkboxes automatically marked

* + Case Updates Tab
    - Case Updates History Tab
      * Notification Date indication
      * Assignee shall be displayed for each updated case row
      * Clickable entire row, opening the case detail view in a new browser tab
    - Case Activity History Tab
      * Displays the history of case additions or removal, both individually and in bulk.
  + Case Analysis Tab
    - Case Type Breakdown Chart
      * Total number of cases
      * Cases that account for less than 1% of the total will not be displayed as individual segments; instead, they will be grouped under “Others”
      * When a segment in the chart is clicked, a table will appear displaying the case type, number of cases, and percentage of the total
        + Clicking the case type (whole item) button for the specific case type navigates users to the case view table, filtered to show only the selected case type
        + Clicking the each case type button for “Others” navigates users to the case view table, filtered to show only that case type in the “Others”
    - Case Status Breakdown Chart
      * Separate charts will be displayed for each of the following government agencies:  
        *(If no data is available for a specific agency, its chart will be hidden from the view page)*
        + USCIS
        + DOL
        + NVC
        + EOIR
      * When a segment in the chart is clicked, a table will appear displaying the status type, number of status, and percentage of the total
        + Clicking the “See Detailed Data” button for the specific status type navigates users to the case view table, filtered to show only the selected status type