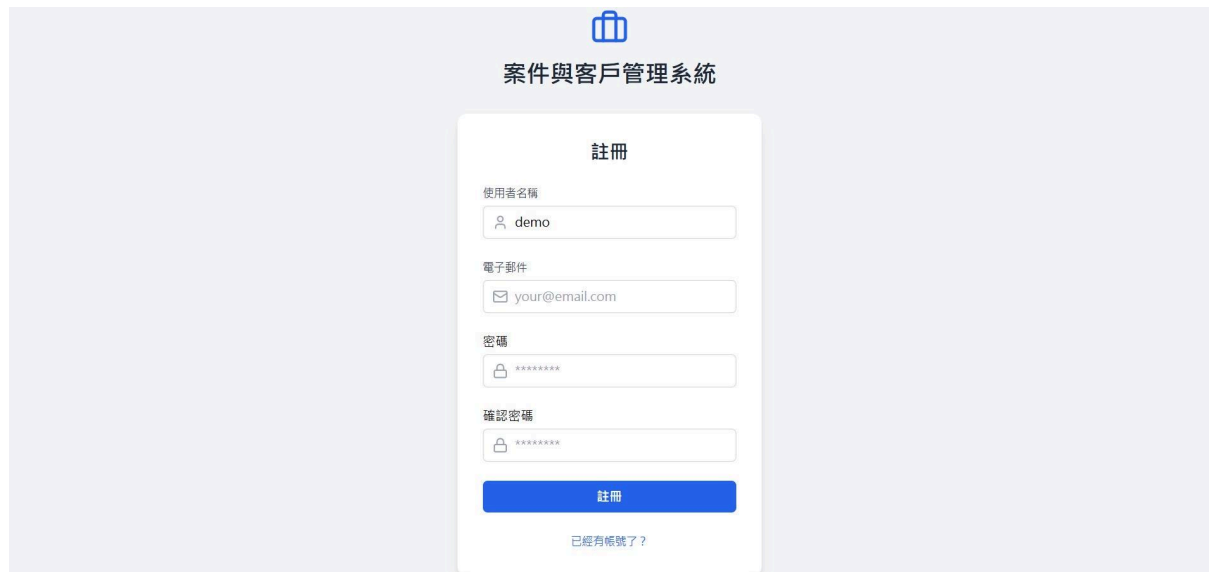


# Case & Client Management System

This is the user guide for the Case & Client Management System. Due to time constraints, only the important/complex features are explained here. For any other questions, please email: [e1481848@u.nus.edu](mailto:e1481848@u.nus.edu)

*This system is designed for a Hong Kong office, so some of the interfaces are in traditional Chinese*

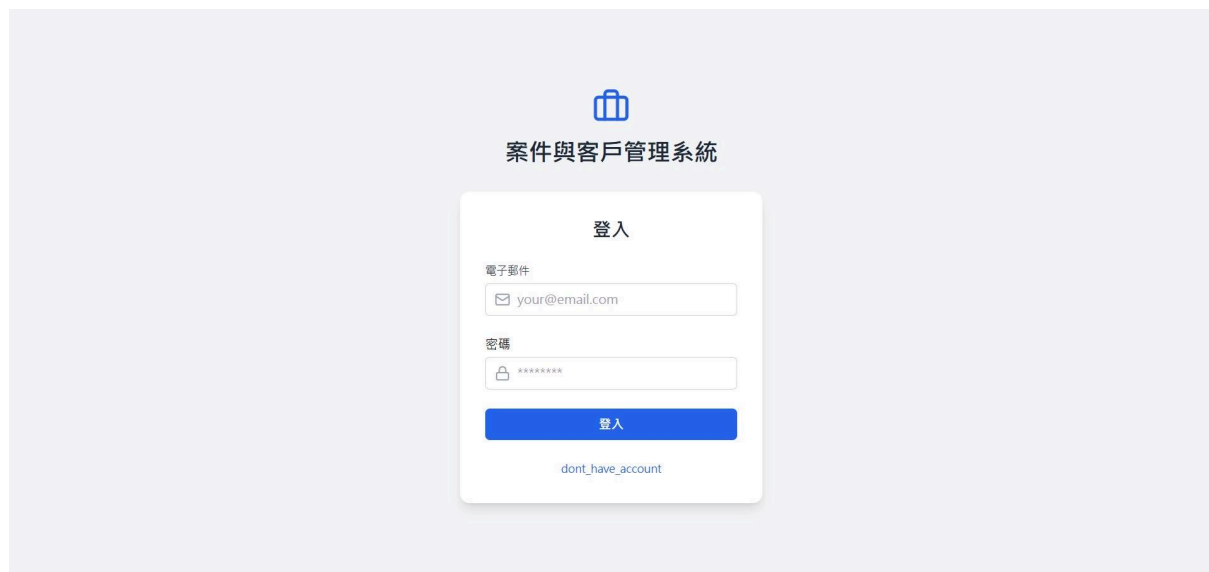
## Register your account:



The screenshot shows the registration interface of the Case & Client Management System. At the top, there is a blue icon of a briefcase and the title "案件與客戶管理系統" (Case & Client Management System). Below this is a white registration form titled "註冊" (Register). The form contains four input fields: "使用者名稱" (Username) with the value "demo", "電子郵件" (Email) with the value "your@email.com", "密碼" (Password) with masked characters, and "確認密碼" (Confirm Password) with masked characters. A blue "註冊" (Register) button is at the bottom of the form. Below the button is a link that says "已經有帳號了?" (Already have an account?).

After successfully registering, you will see a pop-up window that says so, then you can go to your email for verification.

## Log in page:



The screenshot shows the login interface of the Case & Client Management System. At the top, there is a blue icon of a briefcase and the title "案件與客戶管理系統" (Case & Client Management System). Below this is a white login form titled "登入" (Login). The form contains two input fields: "電子郵件" (Email) with the value "your@email.com" and "密碼" (Password) with masked characters. A blue "登入" (Login) button is at the bottom of the form. Below the button is a link that says "dont\_have\_account" (Don't have an account).

After entering, you will be taken to the main screen, which is divided into several sections for introduction:

Case & Client Management System

Section 1: Case Management

Section 2: People Management

Section 3: Event Management

Section 4: Profile

Reference ID

Q Search...

Year









Month

Day

All Types

All Statuses

+ Add Case

REFERENCE ID	CASE TYPE	ROLES	DATE	CASE STATUS	ACTIONS
Case-004	Tenancy Agreement	Tenant: Amy Landlord: Andy	14/09/2025 Signing Date	Ongoing	 
Case-003	Litigation Civil	Defendant: Amy Plaintiff: Andy	14/09/2025 Hearing Date	Ongoing	 
Case-002	Conveyancing Residential	Vendor: Amy Purchaser: Andy	15/09/2025 Completion Date	Ongoing	 
Case-001	Commercial Will	Executor: Amy Beneficiary: Andy		Ongoing	 

Click to change display language (Chinese or English)

## Section 1: Case Management:

Case & Client Management System

Case Management

People Management

Event Management

Reference ID

Q Search...

Year









Month

Day

All Types

All Statuses

+ Add Case

REFERENCE ID	CASE TYPE	ROLES	DATE	CASE STATUS	ACTIONS
Case-004	Tenancy Agreement	Tenant: Amy Landlord: Andy	14/09/2025 Signing Date	Ongoing	 
Case-003	Litigation Civil	Defendant: Amy Plaintiff: Andy	14/09/2025 Hearing Date	Ongoing	 
Case-002	Conveyancing Residential	Vendor: Amy Purchaser: Andy	15/09/2025 Completion Date	Ongoing	 
Case-001	Commercial Will	Executor: Amy Beneficiary: Andy		Ongoing	 

## Functions:

The screenshot shows the Case Management interface with several handwritten annotations in red and black ink. A red box around the search bar is labeled "Searching". A red box around the filter dropdowns is labeled "Filters". A red box around the "+ Add Case" button is labeled "Add Case". A red box around the "Case-004" link in the table is labeled "Overview". A red box around the "Landlord: Andy" text is labeled "Can link to client's info page". A red box around the edit and delete icons in the actions column is labeled "Edit or Delete".

REFERENCE ID	CASE TYPE	ROLES	DATE	CASE STATUS	ACTIONS
<a href="#">Case-004</a>	Tenancy Agreement	Tenant: Amy Landlord: Andy	14/09/2025 Signing Date	Ongoing	<a href="#">Edit</a> <a href="#">Delete</a>
Case-003	Litigation Civil	Defendant: Amy Plaintiff: Andy	14/09/2025 Hearing Date	Ongoing	<a href="#">Edit</a> <a href="#">Delete</a>
Case-002	Conveyancing Residential	Vendor: Amy Purchaser: Andy	15/09/2025 Completion Date	Ongoing	<a href="#">Edit</a> <a href="#">Delete</a>
Case-001	Commercial Will	Executor: Amy Beneficiary: Andy		Ongoing	<a href="#">Edit</a> <a href="#">Delete</a>

### 1. Searching:

The search bar has a dropdown menu with the following options:

- Reference ID
- Reference ID
- Keyword

Can search by reference ID or any keyword you want (including your attachment's name), and all matching results will be displayed.

### 2. Filters:

You can filter by date, type, and status. For status, if you hover over a category, its subcategories will appear.

The filter dropdown menus show the following options:

- All Types
- Commercial
- Conveyancing
- Litigation
- Tenancy Agreement
- All Statuses
- Will
- Probate
- Contract

### 3. Overview of case:

#### Case Details



Reference ID	Case-003
Case Type	Litigation - Civil
Case Status	Ongoing

#### Roles

Defendant	<a href="#">Amy</a>
Plaintiff	<a href="#">Andy</a>

#### Details

Next Step	Win!
Court Name	Court A
Case Number	Case-003
Hearing Date	14/09/2025
Limitation Date	14/09/2025
Opposing Counsel	Ms. Chang
Related Property	Address1

#### Attachments (1) ^

☐ Select All

☐  [course-c30cb1b4-f4f4-4d71-9a53-6adf252235b5.pdf](#)

Uploaded on: 14/09/2025

Each case type has a customized overview page. Taking the Litigation type as an example, it will cover all information related to the case. From here, you can also click the client hyperlink to access that client's info page. Attachments support opening files and printing (with a more detailed explanation provided below).

## 4. Case editing:

Edit Case

Reference ID

Case-001

Case Status

Ongoing

Case Type

Litigation

Case Subtype

Civil

Roles

Plaintiff

Unnamed Participant

Defendant

Unnamed Participant

Search...

Search...

Details

Hearing Date

2025/08/08

HearingDateTime

pm 9:00

Court Name

Court A

Opposing Counsel

Ms. Chang

Case Number

Limitation Date

2025/09/30

Next Step

Related Property

Notes

Demo

Attachments

Select All

Adobe Scan Jul 31, 2025.pdf

Uploaded on: 08/08/2025

+ Add Attachment

custom\_fields

Address

1234

+ add\_field

Permission

Public





Cancel

Save


Here you can edit the case and enter all necessary information. The functions of Attachments and permission will be introduced below:


#### i. Attachments:


Attachments


4 Selected    

☒ Select All

☒  Adobe Scan Jul 31, 2025.pdf  
Uploaded on: 08/08/2025

☒  SEP\_Study\_Plan\_ChenPing.pdf  
Uploaded on: 14/09/2025

☒  Admission-rules-for-first-and-second-cycle-education-and-qualifying-and-higher-educ  
Uploaded on: 14/09/2025

☒  course-c30cb1b4-f4f4-4d71-9a53-6adf252235b5 (1).pdf  
Uploaded on: 14/09/2025

+ Add Attachment

This is a place where you can put all your attachments. The files will be saved on our system, so even if you change to another computer/account, your files will still be there.

Note that in the upper right corner, four buttons will appear after selecting files. They correspond to: bulk open, bulk download, bulk print, and bulk delete. (You can also choose to directly click the file name or the “x” beside it to open or delete a single file.)

## ii. Bulk open, bulk print:

### Open Remaining Files

Click each link to process. The link will disappear after being clicked.

[🔗 Adobe Scan Jul 31, 2025.pdf](#)

[🔗 SEP\\_Study\\_Plan\\_ChenPing.pdf](#)

[Admission-rules-for-first-and-second-cycle-education-and-qualifying-and-higher-education-access-programmes-at-Lund-University.pdf](#)

[🔗 course-c30cb1b4-f4f4-4d71-9a53-6adf252235b5 \(1\).pdf](#)

Close

A pop-up window will appear. You can tap on the file name, and the corresponding file will be opened in a new tab (for viewing or printing, depending on the function selected) and will disappear from this pop-up window.

## iii. Bulk download:

All selected files will be packaged into a compressed folder and downloaded to your computer, with the folder name the same as the case name.

 CASE-001	2025/8/4 下午 06:50	壓縮的 (zipped) ...	4,481 KB
--	-------------------	------------------	----------

Permission:

Permission

Private

Private

Public

Custom Share


Here you can choose who can view or edit your files:


- **Public:** Accessible by anyone
- **Private:** Only accessible by yourself
- **Custom share:** You can select your predefined custom groups (introduced in the User Home section) or share with any of our users (no limit on the number).


Share with

Select users or groups...

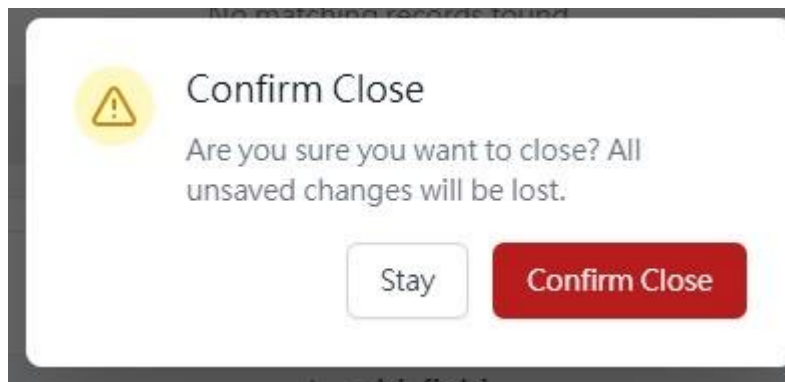
SHARING GROUPS

 Group1

 cp2

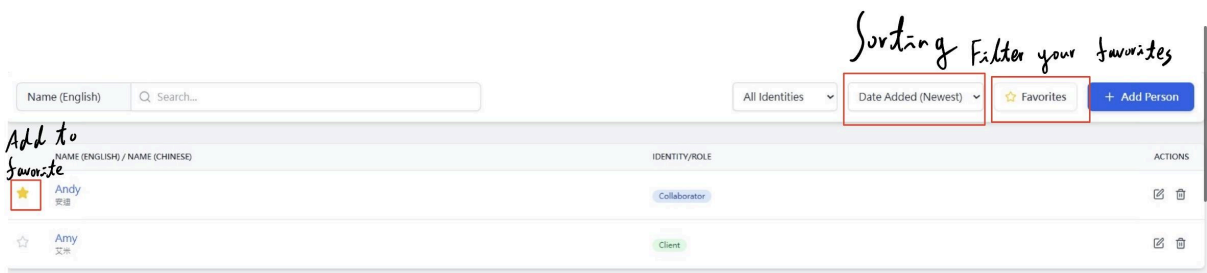
 cp

Note: If any changes are made to the case, a warning will pop up when you try to leave this page without saving. To continue editing the case, please click **Stay**.



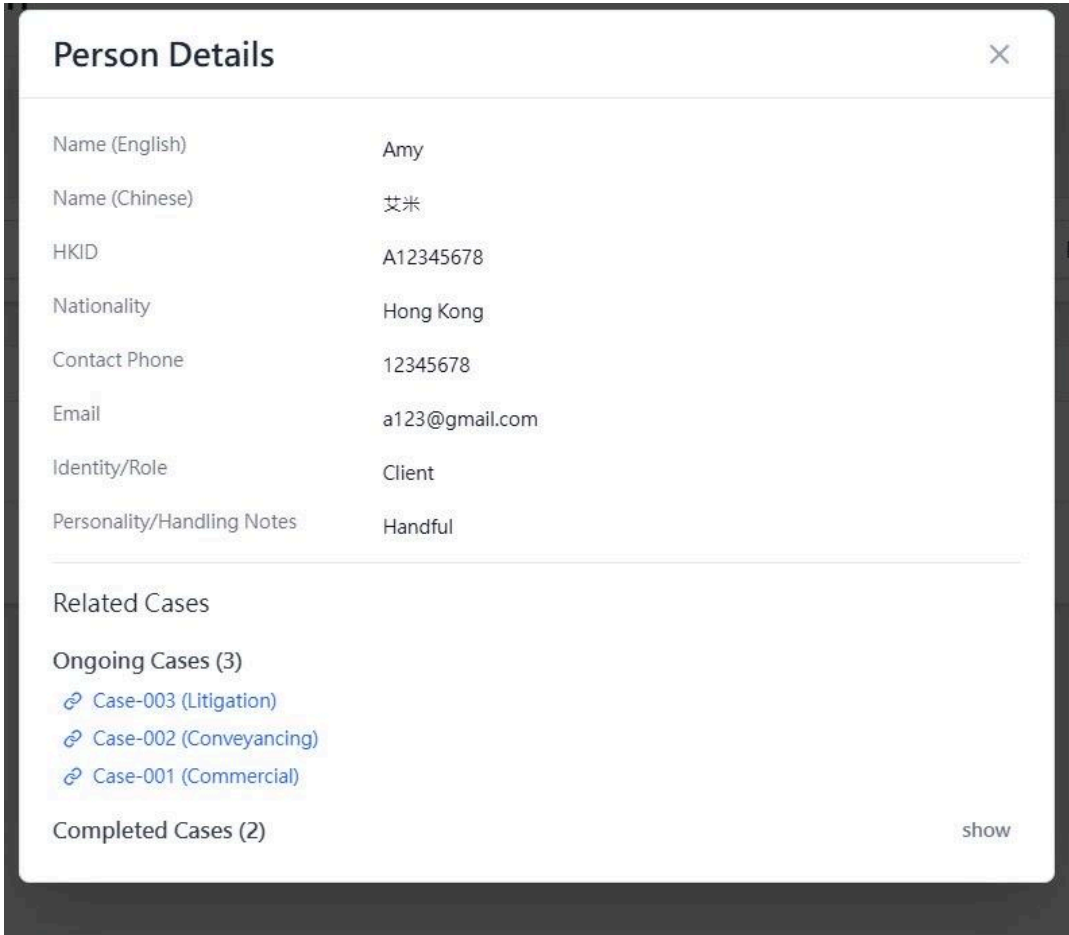


## Section 2: People management:



Similar to case management, you can search on the left side. This supports English names, Chinese names, ID numbers, or any keyword. On the right side are Filters. Note that there is an additional **Sorting** option here, allowing you to display results by date or in alphabetical order of names.

### 1. Info page:



All client-related information will be displayed here. Note that clicking on a case will also link to the case's info page. Closed cases will be automatically collapsed for a cleaner view, and you can click **Show** on the right to display them along with the active cases.

#Editing and other functions are the same as in the **Case Management** section.

## Section 3: Event management:

Today's Reminders

All Day [Tenancy Agreement] - Case-004

Signing Date

Plaintiff: N/A

Defendant: N/A

Notes: Expiring soon

All Day [Litigation] - Case-003

Hearing Date

Case Number: Case-003

Plaintiff: N/A

Defendant: N/A

Court Name: Court A

Limitation Date: 14/09/2025

Next Step: Win!

Upcoming (Next 7 Days)

15/09/2025 All Day [Conveyancing] - Case-002

Completion Date

Plaintiff: N/A

Defendant: N/A

9:00 AM Event with Andy, Amy

Related People/Contacts: Andy, Amy

Our Attendees: cp2, cp

Location: NUS

All of today's and upcoming cases will be displayed here, distinguished by different colors. They are mainly divided into two sections: today's reminders and events happening within the next seven days.

- If the event is a case, clicking it will link to the case's info page, and you can use the edit button on the right to make changes.
- If the event is an activity, clicking it will take you to the activity's info page, where you can edit or delete it using the buttons on the right.

### 1. Event info page:

Event Details

Date17/09/2025Timeam 9:00

LocationNUS

Related People/Contacts

Andy

Amy

Our Attendees

cp2, cp

Close

From here, you can link to the person's info page (if available)

## 2. Event editing:

### Edit Event



#### Related People/Contacts

 Select from list or type a new name

+ Add

 Andy



 Amy



#### Date

2025/09/17



#### Time

am 9:00



#### Location

NUS

#### Our Attendees

##### Share with

cp2 x

cp x

2 Selected



#### Permission

Public




#### Related Case (Optional)

None



#### Notes




Cancel

Save

### i. Related people:


Related People/Contacts


 a| + Add


Andy

Amy

Related People/Contacts

 Select from list or type a new name + Add

 not\_our\_client ×

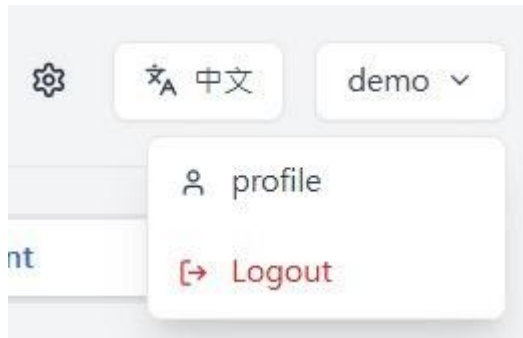
 Andy ×

When you type text into the field, people already in the system will pop up for you to select. If the person you want is not in the system, you can manually enter the name and then click **Add** beside it.

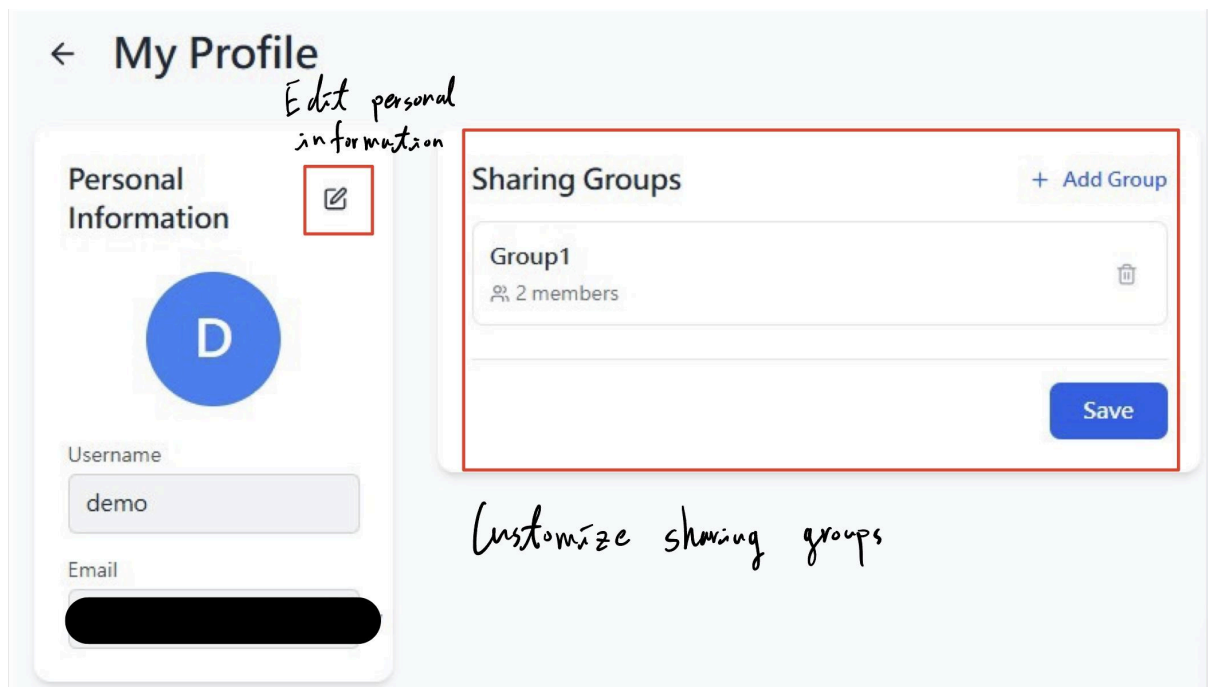
The **Share with** function works the same way as the permission feature in the case and person sections.

## Section 4: User Profile

Click your username in the upper-right corner and then click **Profile**.



You will then be taken to this page:



### Customize sharing groups:

Since workplaces often have specific teams or frequently shared contacts, this feature allows you to create commonly used groups to avoid selecting individuals one by one each time.

You can click **Add Group** in the upper-right corner to create a new team.


## Sharing Groups


Create New Group

Cancel

Save Group

Group1

 2 members



Save

Simply enter the desired group name here and select the members to successfully create the group.

**The above is the introduction of the current features. In the future, an email notification system (sending reminders for today's events) is planned to be added.**