Case & Client Management System

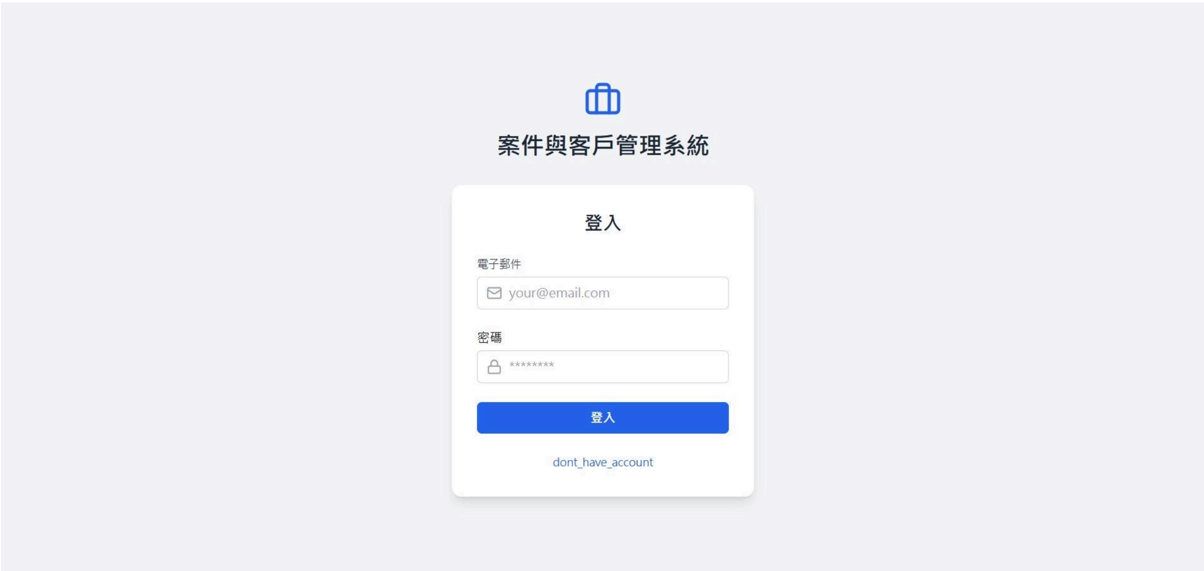
This is the user guide for the Case & Client Management System. Due to time constraints, only the important/complex features are explained here. For any other questions, please email: e1481848@u.nus.edu

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

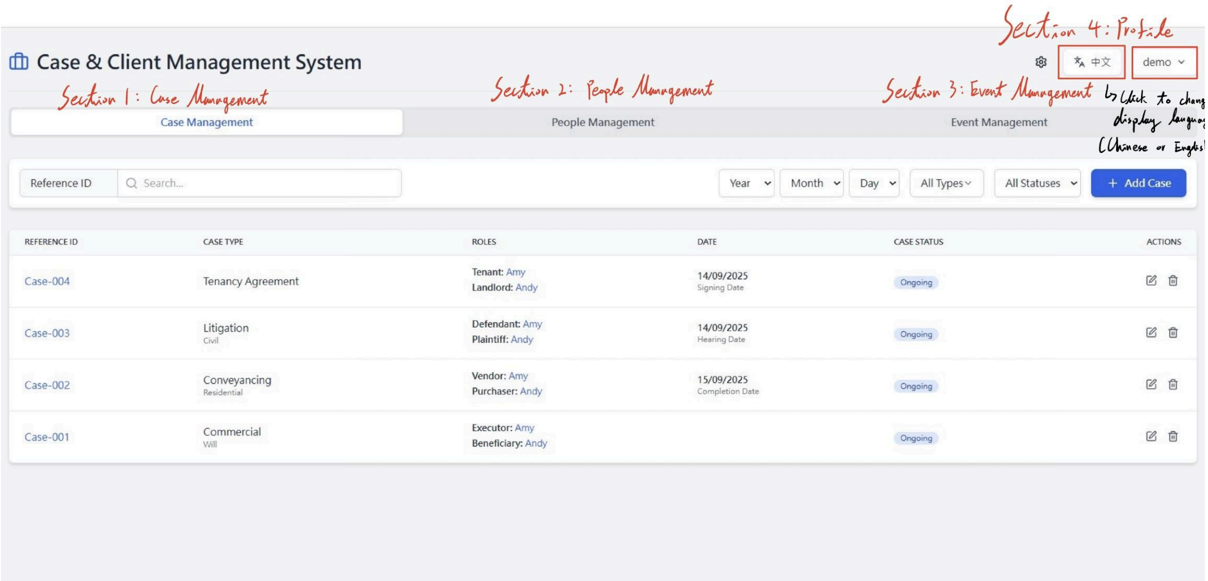
Register your account:

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

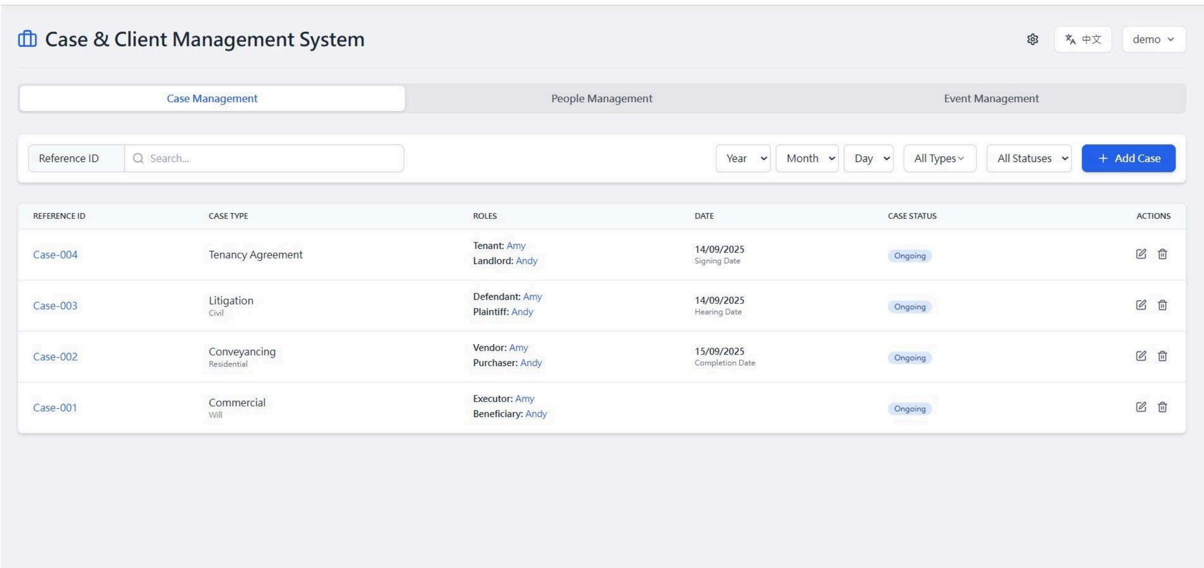
Log in page:



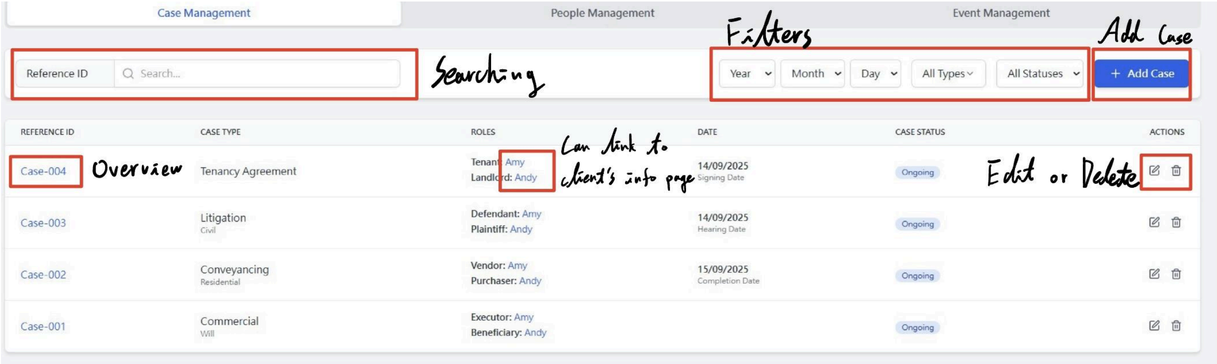
After entering, you will be taken to the main screen, which is divided into several sections for introduction:



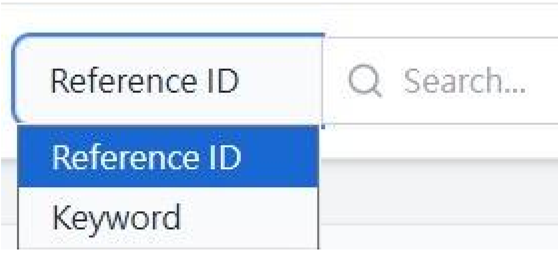
Section 1: Case Management:



Functions:

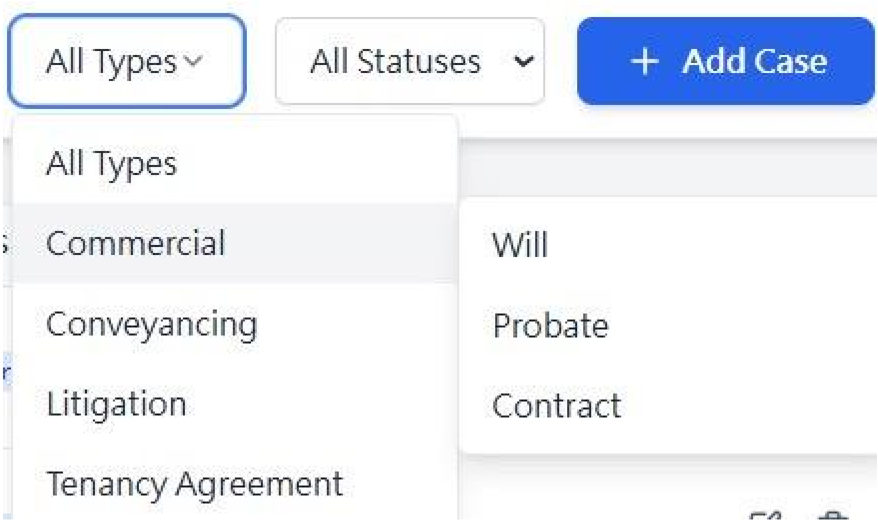


1. **Searching:**

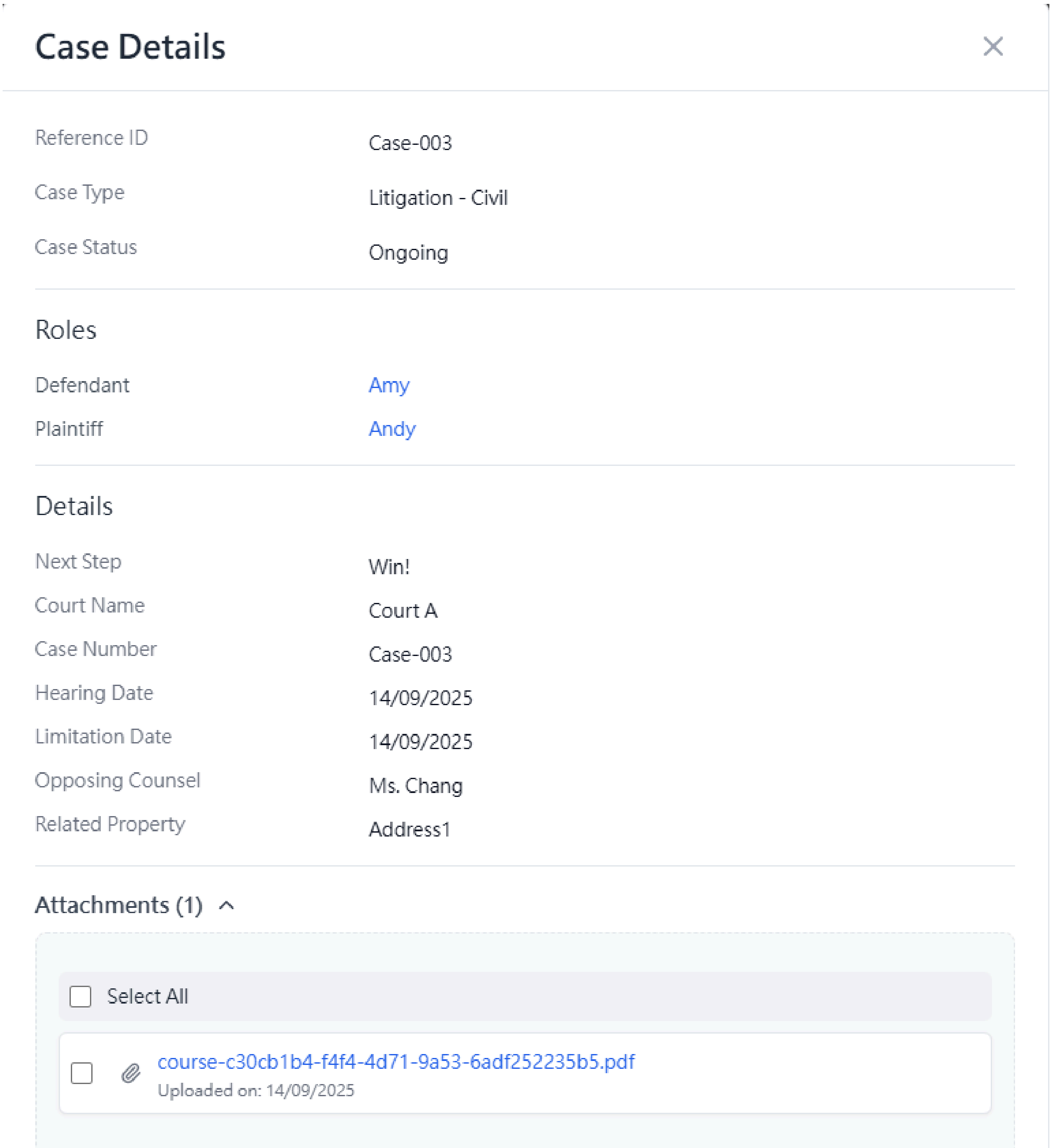


Can search by reference ID or any keyword you want (including your attachment's name), and all matching results will be displayed.

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

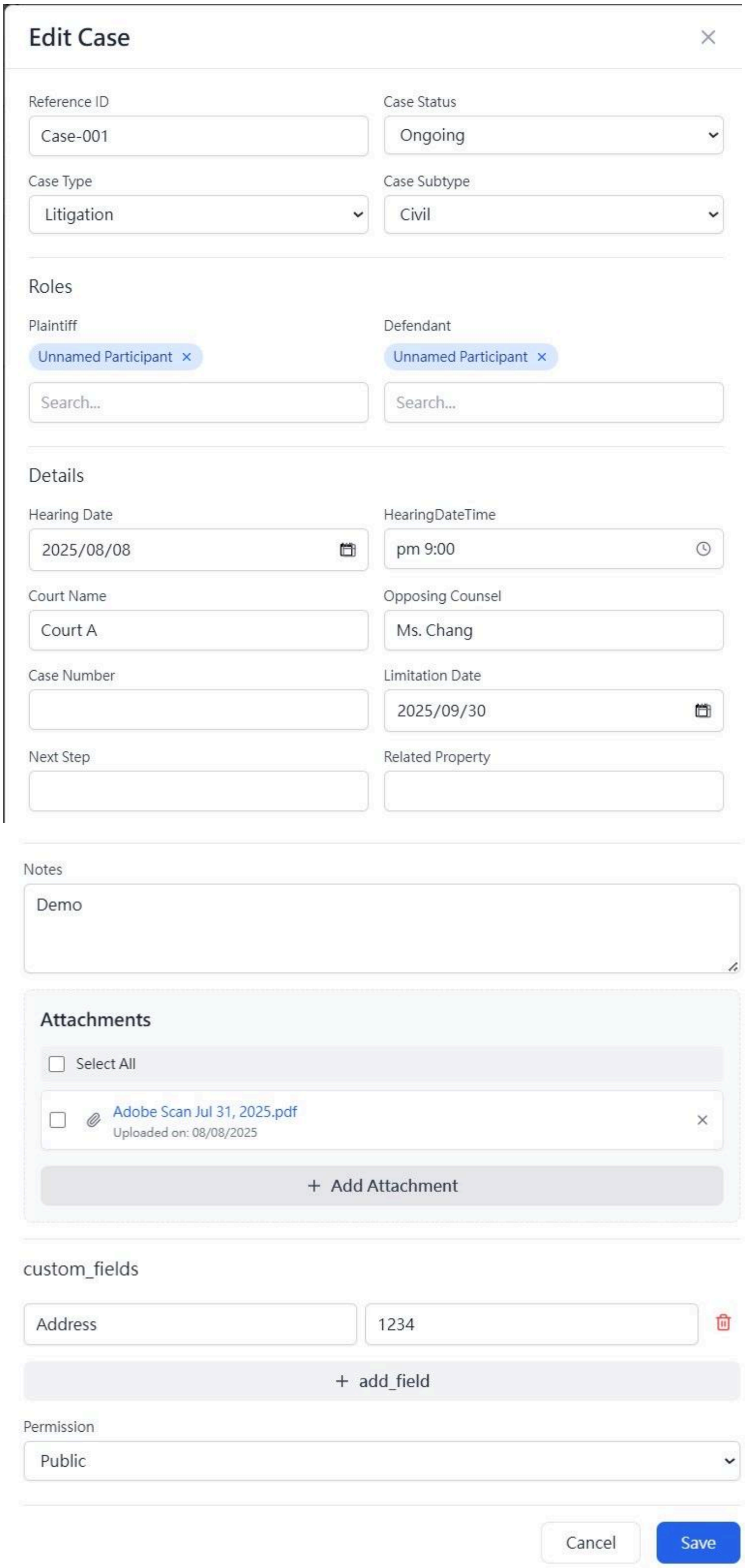


3. **Overview of case:**



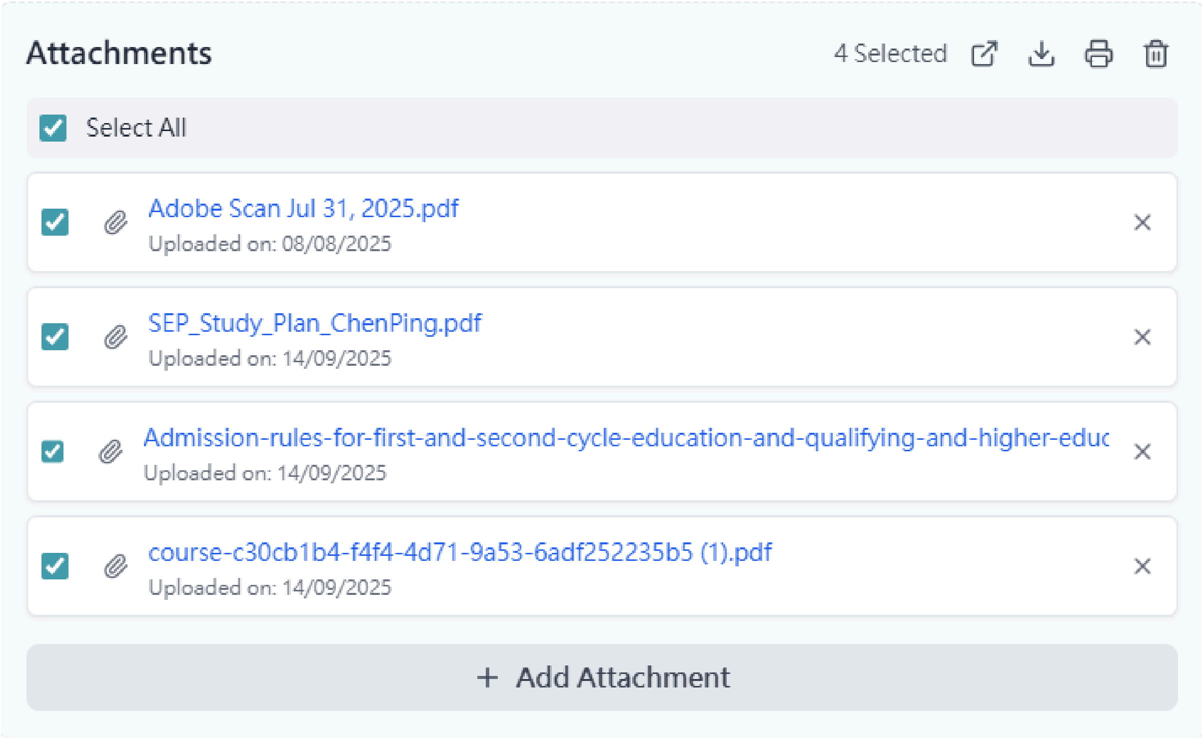
Each case type has a customized overview page. Taking the Litigation type as an example, it will cover all information related to the case. From here, you can also click the client hyperlink to access that client's info page. Attachments support opening files and printing (with a more detailed explanation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

4. Case editing:



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

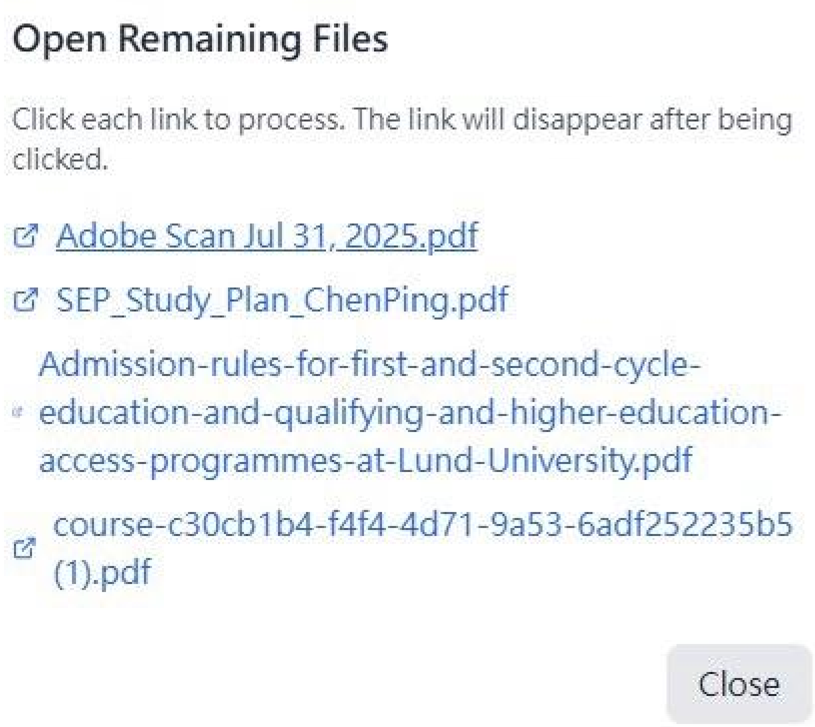
i. Attachments:



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:



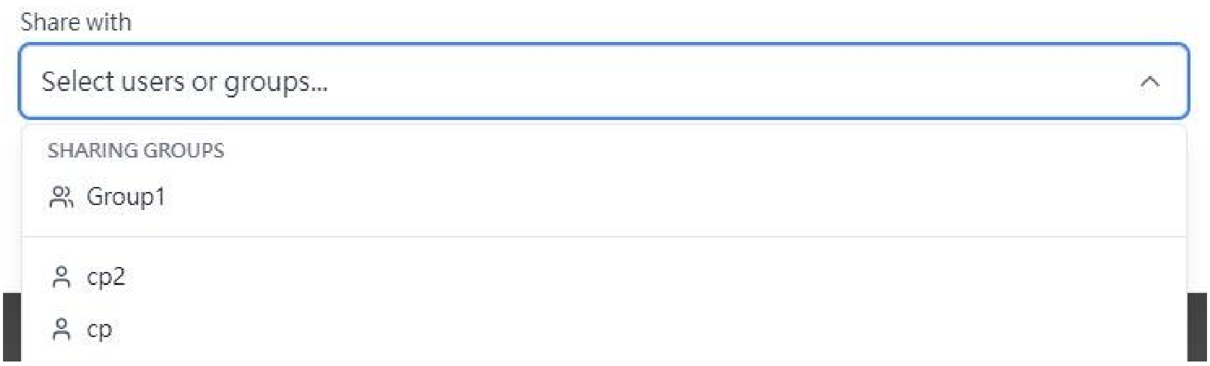
A pop-up window will appear. You can tap on the file name, and the corresponding file will be opened in a new tab (for viewing or printing, depending on the function selected) and will disappear from this pop-up window.

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.

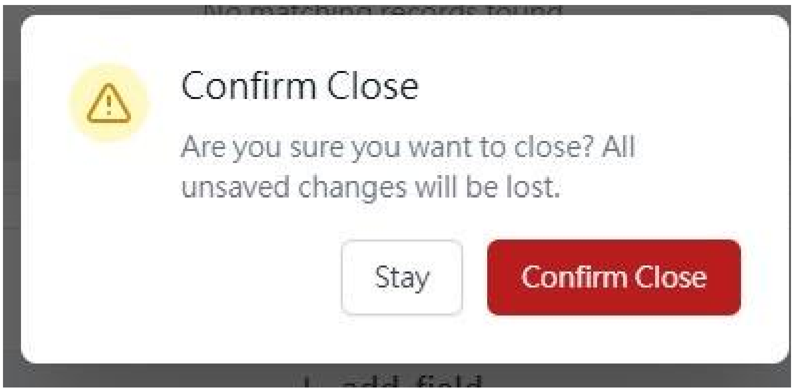
Permission:

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

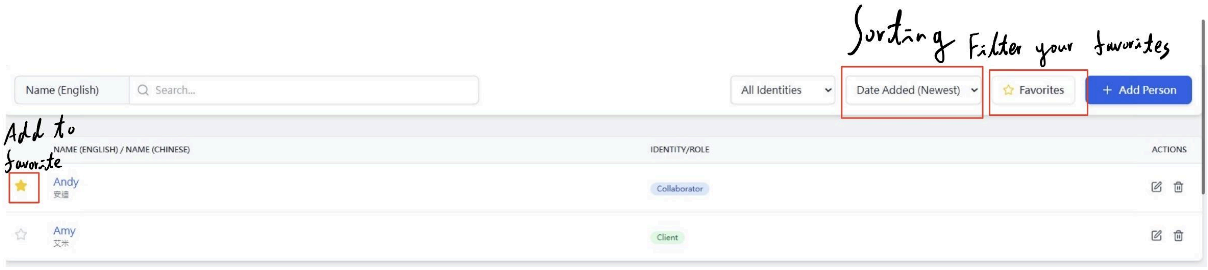
- **Public**: Accessible by anyone
- **Private**: Only accessible by yourself
- **Custom share**: You can select your predefined custom groups (introduced in the User Home section) or share with any of our users (no limit on the number).



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**.

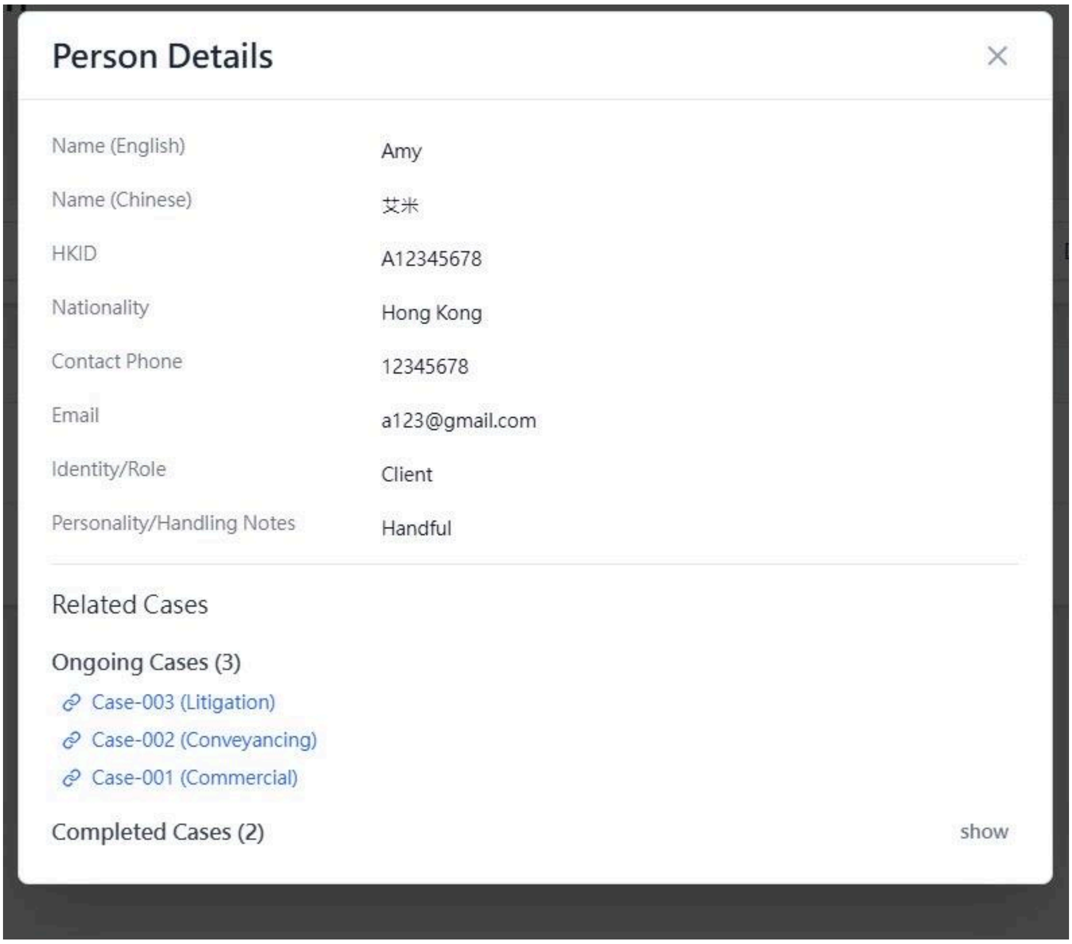


Section 2: People management:



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.

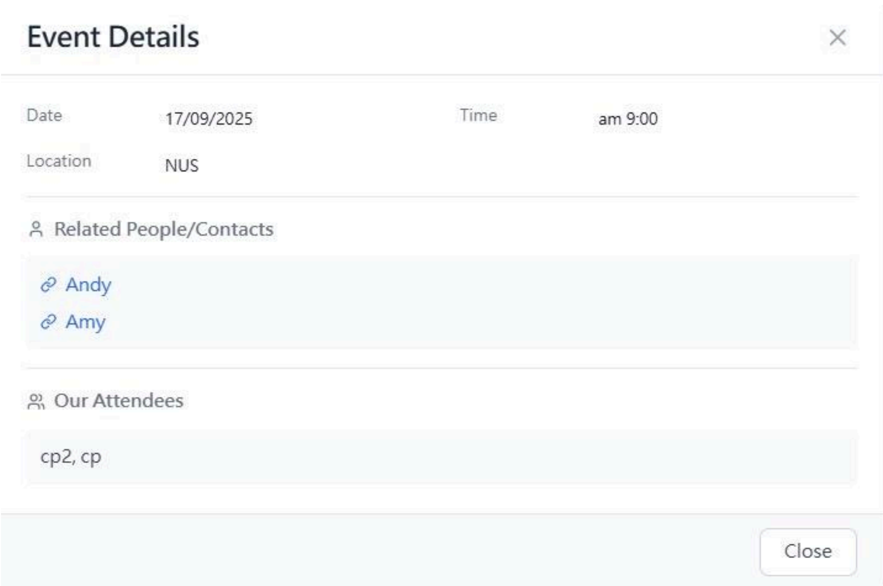
Section 3: Event management:

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.

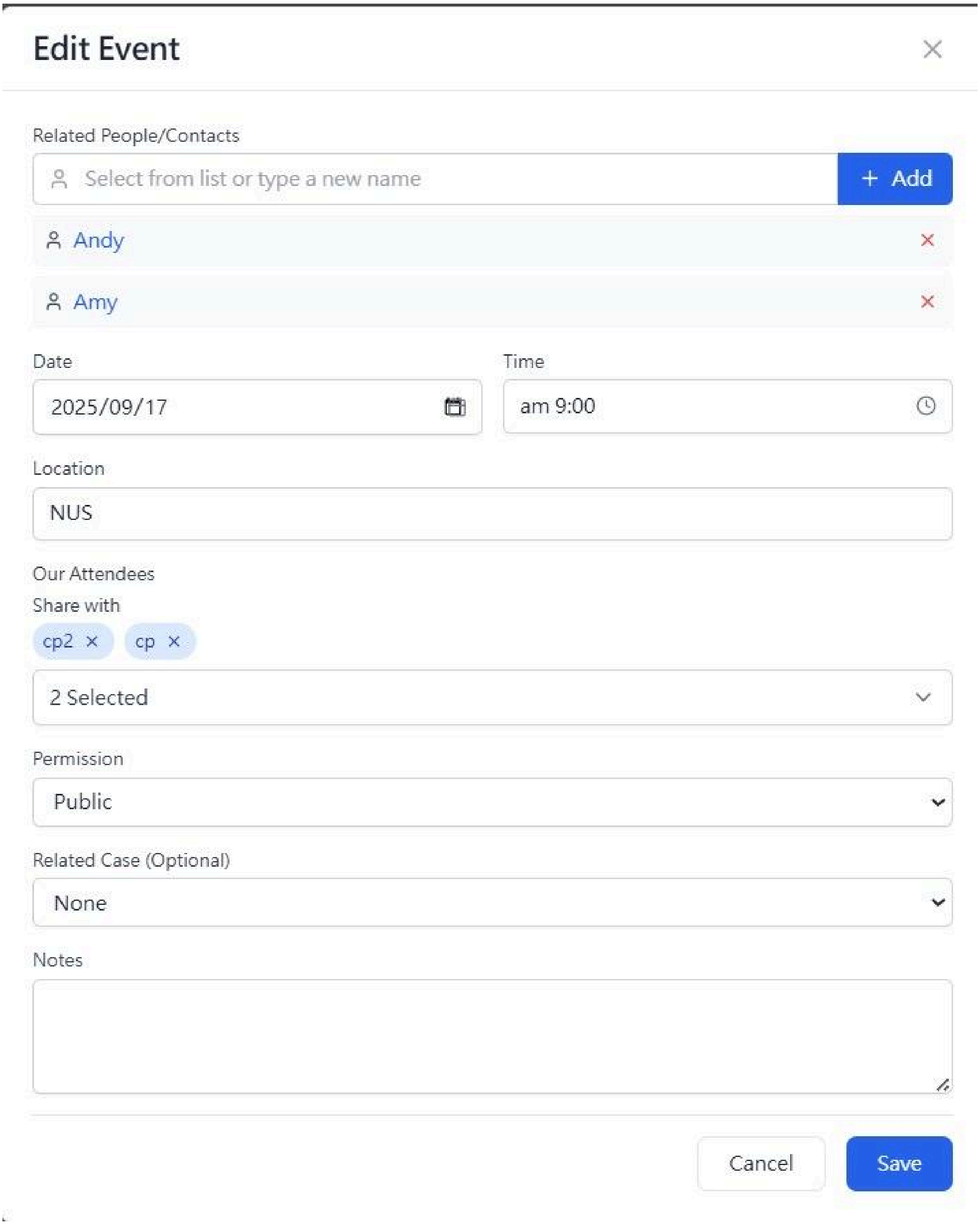
- If the event is an activity, clicking it will take you to the activity's info page, where you can edit or delete it using the buttons on the right.

1. **Event info page:**

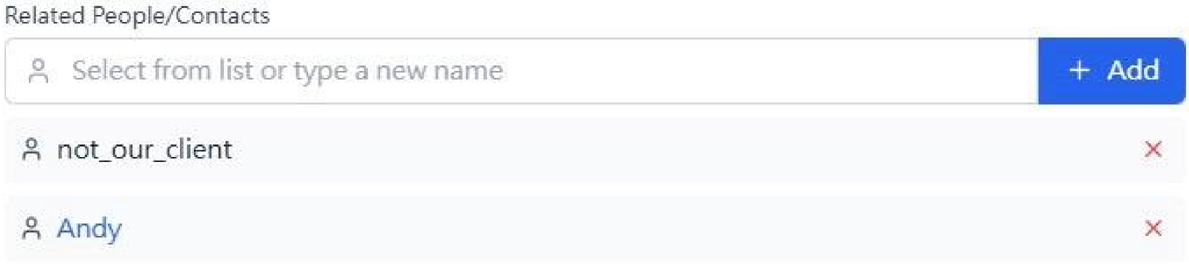


From here, you can link to the person's info page (if available)

2. **Event editing:**



i. Related people:



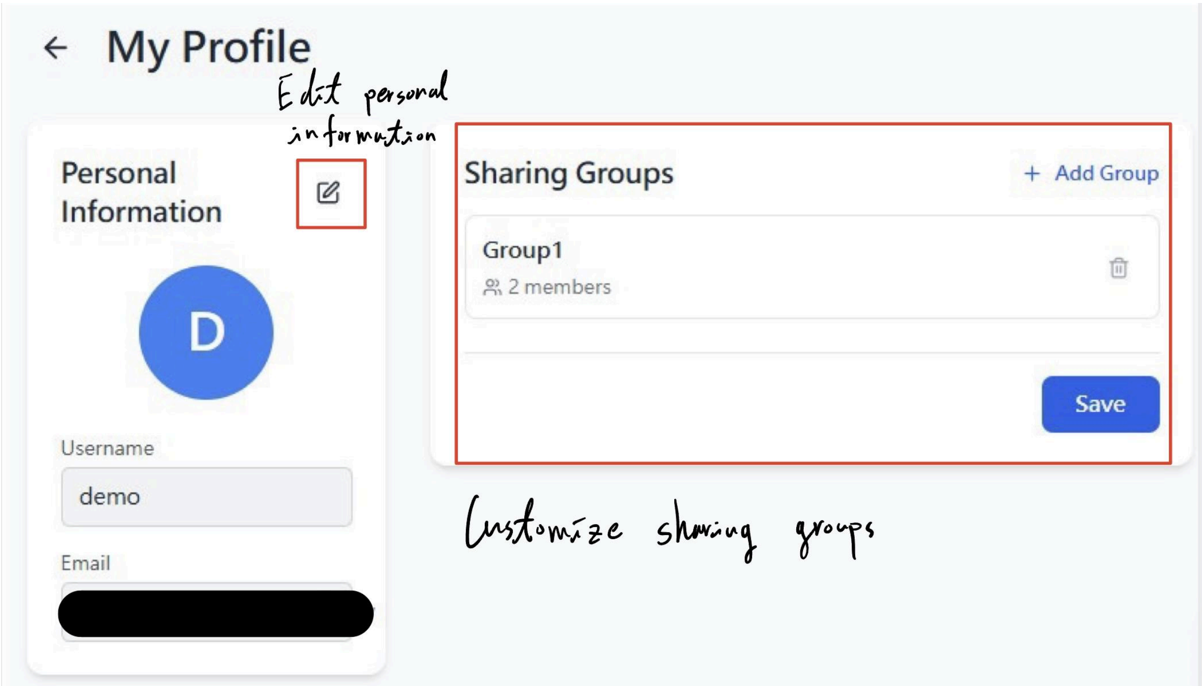
When you type text into the field, people already in the system will pop up for you to select. If the person you want is not in the system, you can manually enter the name and then click **Add** beside it.

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**.

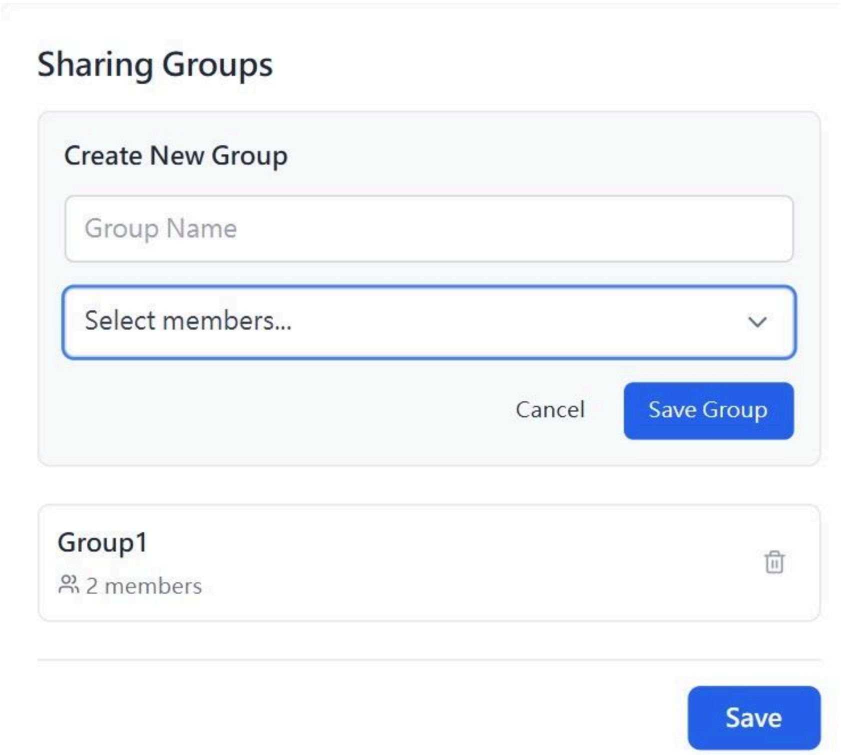
You will then be taken to this page:



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.



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.