Final Project Report – LegalAid Connect

Project Title: LegalAid Connect – Assisstance Management
Phase: 10 – Final Documentation & Presentation
Date: 30 September 2025
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1. Executive Summary

LegalAid Connect is a Salesforce-based CRM platform designed to modernize and digitize the delivery of legal aid services. The system connects clients, advocates, paralegals, and administrators, enabling faster case handling, transparent tracking, and secure access to legal resources.

Through 10 structured phases, the project addressed real-world challenges in the legal aid sector, delivered scalable Salesforce solutions, and built end-to-end features including client intake, case management, service logging, reporting, and dashboards.

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2. Problem Statement

Legal aid organizations face challenges such as:

Clients: Limited access to legal help, lack of transparency in case status.

Advocates & Paralegals: Heavy manual case tracking, inefficient intake workflows.

Administrators: Difficulty ensuring confidentiality, limited insights into service delivery.

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3. Solution Overview

LegalAid Connect provides:

- **Client Empowerment:** Digital client records and real-time case tracking.
- **Advocate Tools:** Dashboards for workload management, service logging, and case progress monitoring.
- **Administrator Support:** Reports and analytics for performance tracking and compliance.
- **Automation:** Notifications, approvals, and process automation to improve efficiency.

Built entirely on Salesforce CRM, the solution leverages **custom objects, automation, Apex, LWCs, and integrations** tailored for the legal sector.

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4. Project Phases & Deliverables

Phase 1: Problem Understanding & Industry Analysis

- Stakeholder analysis (clients, advocates, paralegals).
- Success metrics and legal aid pain-point validation.

Phase 2: Org Setup & Configuration

- Developer Org setup, users, roles, and profiles.
- Security baseline: OWD, FLS, Permission Sets.

Phase 3: Data Modeling & Relationships

- Custom objects: *Client, Legal Case, Advocate, Service Provided*.
- Schema Builder used to map relationships.

Phase 4: Process Automation (Admin)

- Validation Rules → ensure mandatory client/case details.
- Flows → auto-create Service Provided records on case updates.
- Approval Processes → advocate approvals for sensitive case closures.

Phase 5: Apex Development

- Triggers → automatic case updates & notifications.
- Apex Classes → case workload calculations, client service summaries.
- Asynchronous Apex → for reporting-heavy batch jobs.
- Test Classes → ensured 80%+ coverage**.**

Phase 6: Lightning Web Components (LWCs)

- Advocate Dashboard: case stats, workload.
- Client Service Log Component.
- Admin Case Management Panel.

Phase 7: Integration

- Integration with **Legal Aid Directory API** for advocate verification.
- Integration with **Government Case Portal API** for compliance tracking.

Phase 8: Data Management & Deployment

- Data import (clients, legal cases).
- Migration using Data Loader.
- Deployment pipeline via Change Sets.

Phase 9: Reporting & Dashboards •

- Role-based Dashboards:
    - Clients – case progress summary. o   Advocates – assigned

        workload & outcomes.

    - Admins – service delivery analytics.
- Dynamic Dashboards → personalized analytics per user role.

Phase 10: Final Presentation & Wrap-Up

- Consolidated all documentation into project report & README.
- Prepared PPT for demo day.
- Project ready for deployment to pilot legal aid centers.

5. Security & Compliance

- **Data Security:** Role hierarchy, FLS, OWD.
- **Compliance:** Confidentiality requirements, GDPR & Indian IT Act compliance.
- **Audit Trail:** Tracking for case updates, approvals, and service logging.

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6. Project Outcomes

- **Clients:** Improved access to legal aid, transparency in case progress.
- **Advocates:** Streamlined case handling & visibility into workload.
- **Admins:** Strong reporting tools to monitor service delivery.
- Project reached **Phase 10 completion** with a functional Salesforce org.

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7. Future Enhancements

- **AI (Einstein):** Predictive case duration & advocate workload forecasting.
- **Document Automation:** Auto-generate legal notices and case summaries.
- **Mobile App:** Client self-service portal for status tracking.
- **Integration with Courts:** Direct sync of case hearing schedules.

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8. Conclusion

LegalAid Connect successfully digitizes legal aid delivery using Salesforce CRM, bridging the gap between clients, advocates, and administrators. The phased implementation ensured secure, scalable, and user-friendly features, making the project ready for real-world adoption.

Final Status: Project Completed (Phase 1–10).
Deliverables: Source Code, Documentation, Reports, PPT.