Clara Application

Technical & Functional Specification Documentation

Client Portal Module

Table of Contents

1. Login.....3

1.1 Email OTP.....4

1.2 Mobile OTP.....5

2. Summary.....8

3. Matter.....10

4. Receipt No.....13

5. Initial Retainer.....15

6. Payment Plan.....19

7. Invoice.....23

8. Document Upload.....27

9. Document CheckList.....34

1. Login

Functional Specification

User Login into Client Portal

UI Label	Logic
Mobile No	After entering Mobile No and click Login button from UI, pass the selected Mobile No as CONT_NO in CLIENTUSER table and validate only the numerical values.

1. If the validation is successful, then generate OTP and send the OTP details to the selected CONT_NO

2. If the validation is not successful, then error message ' Please enter the registered Mobile Number"

After entering OTP and clicking Login Button, validate OTP and if successful, login into Home page

Else error message "OTP is invalid"

Technical Specification

1.1 Email OTP

Clicking on the **arrow** icon to get OTP, this will appear as shown in the figure.

Initial API Call:

- https://mrclara.com:27070/mnrclara/api/services/mnr-setup-service/login/clientUser/emailOTP [GET]

  Parameter:

  1. emailId

1.2 Mobile OTP

Clicking on the **Login** button, this will appear as shown in the figure.

Initial API Call:

- https://mrclara.com:27070/mnrclara/api/services/mnr-setup-service/login/clientUser/verifyEmailOTP [GET]
  Parameters:
  2. emailId
  3. otp

- https://mrclara.com:27070/mnrclara/api/services/mnr-management-service/clientgeneral/findClientGeneral [POST]

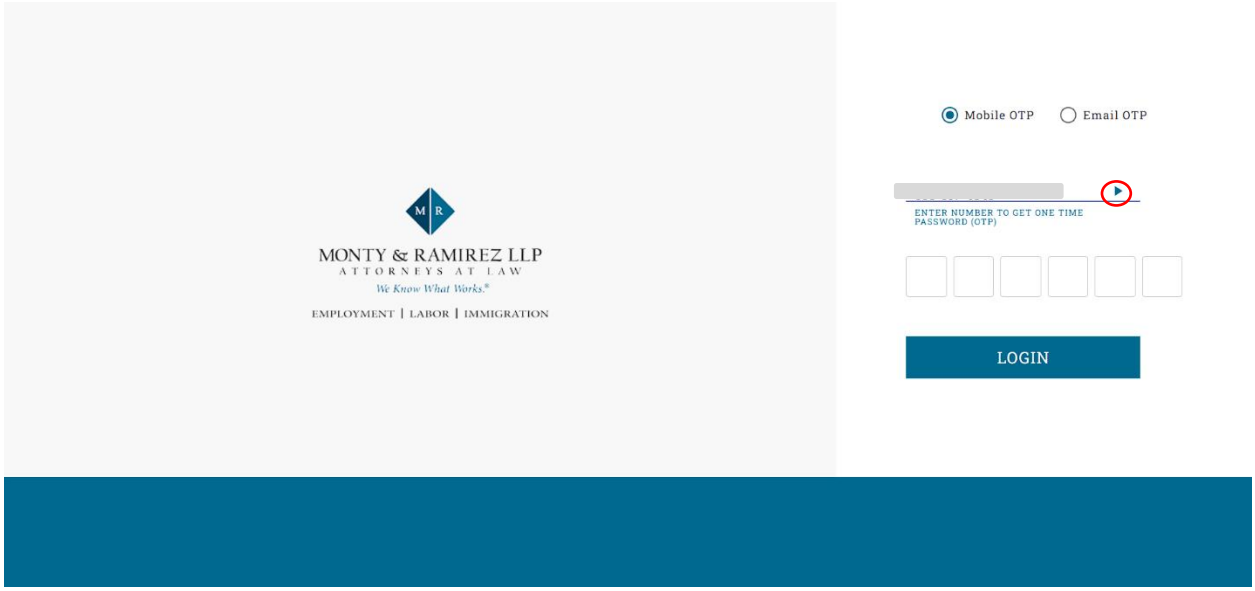
  Body:

```
{
   "emailId": "yourid@gmail.com"
}
```

- https://mrclara.com:27070/mnrclara/api/services/mnr-setup-service/clientUser/findClientUserNew [POST]

  Body:

```
{
   "clientId": [
      "10135"
   ]
}
```



Clicking on the **Login** button, this will appear as shown in the figure.

Initial API Call:

- https://mrclara.com:27070/mnrclara/api/services/mnr-setup-service/login/clientUser/sendOTP [GET]

Parameter:

contactNumber

Clicking on the **Login** button, this will appear as shown in the figure.

Initial API Call:

- https://mrclara.com:27070/mnrclara/api/services/mnr-setup-service/login/clientUser/verifyOTP [GET]

  Parameter:

  contactNumber

2. Summary

Functional Specification

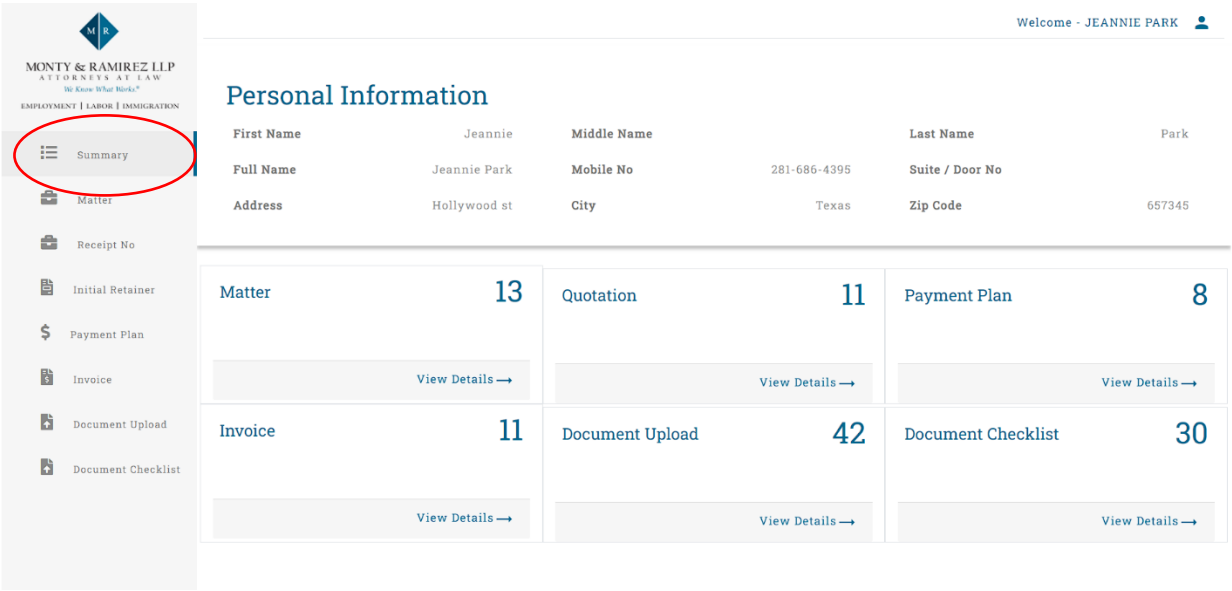
When Login, pass the CLIENT_ID and CONT_NO in CLIENTUSER table and validate QUOTATION,PAYMENTPLAN,MATTER,INVOICE,DOCUMENT,AGREEMENT values.

Display the screens when the value is TRUE for the above fields

1. Profile

UI Label	Field Name	Logic
Name	FIRST_LAST_NM	Pass CONT_NO in CLIENTUSER table and fetch FIRST_LAST_NM
Phone Number	CONT_NO	Logged in CONT_NO
E mail ID	EMAIL_ID	EMAIL_ID from CLIENTUSER table
Account No	CLIENT_USR_ID	CLIENT_USR_ID from CLIENTUSER table
Account Type	CLASS_ID	CLASS_ID/CLASS from CLIENTUSER table
Created on	CTD_ON	CTD_ON from CLIENTUSER table
Status	STATUS_ID	STATUS_ID/STATUS_TEXT from CLIENTUSER table
Address	ADDRESS_LINE1	Pass CLIENT_ID in CLIENTGENERAL table and fetch ADDRESS_LINE1

Technical Specification



Clicking on the **Summary** option, this will appear as shown in the figure.

Initial API Call:

- https://mrclara.com:27070/mnrclara/api/services/mnr-setup-service/clientUser/findClientUserNew [POST]

  Body:

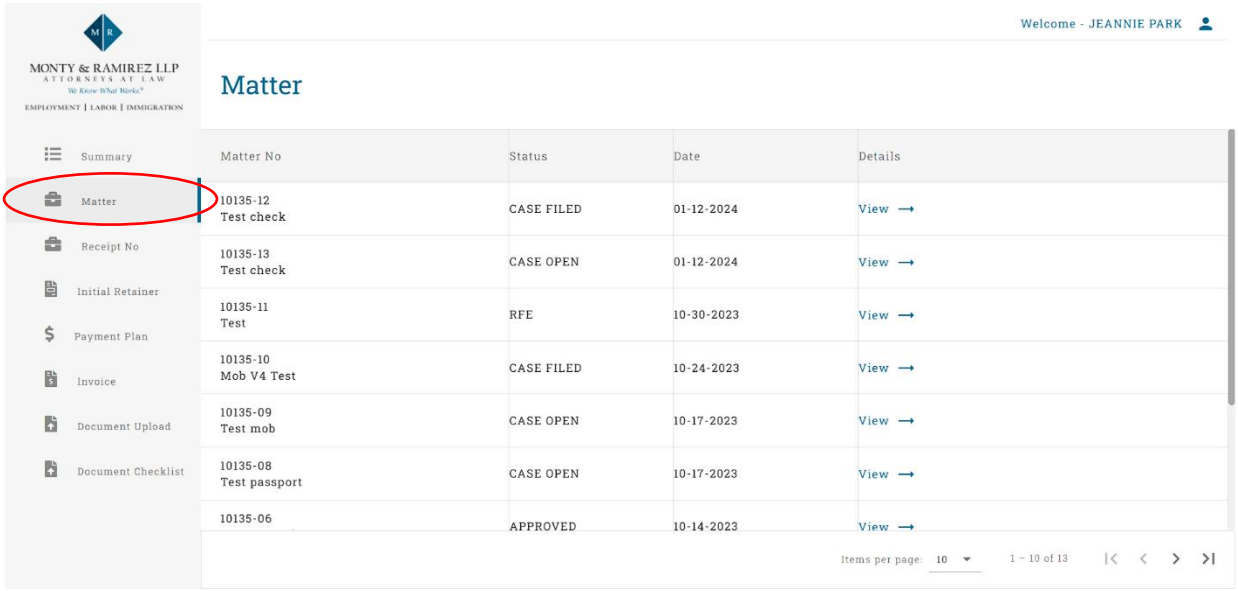
```
{
   "clientId": [
      "10135"
   ]
}
```

3. Matter

Functional Specification

UI Label	Field Name	Logic
Matter No	MATTER_NO	Pass the CLIENT_ID in MATTERGENACC table and fetch list of MATTER_NO and display
Description	MATTER_TEXT	Fetch corresponding MATTER_TEXT for the displayed MATTER_NO from MATTERGENACC table
Assigned Attorney	ASSIGNED_TK	Pass MATTER_NO in MATTERASSIGNMENT table and fetch ASSIGNED_TK and fill
Email ID	EMAIL_ID	Pass ASSIGNED_TK as USR_ID in USERPROIFLE table and fetch EMAIL_D value and fill
Status	STATUS_ID/STATUS_TE	Fetch corresponding STATUS_TEXT for the displayed MATTER_NO from MATTERGENACC table
Open Date	CASE_OPEN_DATE	Fetch corresponding CASE_OPEN_DATE for the displayed MATTER_NO from MATTERGENACC table
Filed Date	CASE_FILED_DATE	Fetch corresponding CASE_FILED_DATE for the displayed MATTER_NO from MATTERGENACC table. Hide this field when CLASS_ID of MATTER_NO is 1
Approved date	APPROVAL_DATE	Pass MATTER_NO in EXPIRYDATE table and fetch corresponding APPROVAL_DATE field values and display Hide this field when CLASS_ID of MATTER_NO is 1
Closed Date	CASE_CLOSED_DATE	Fetch corresponding CASE_CLOSED_DATE for the displayed MATTER_NO from MATTERGENACC table

Technical Specification



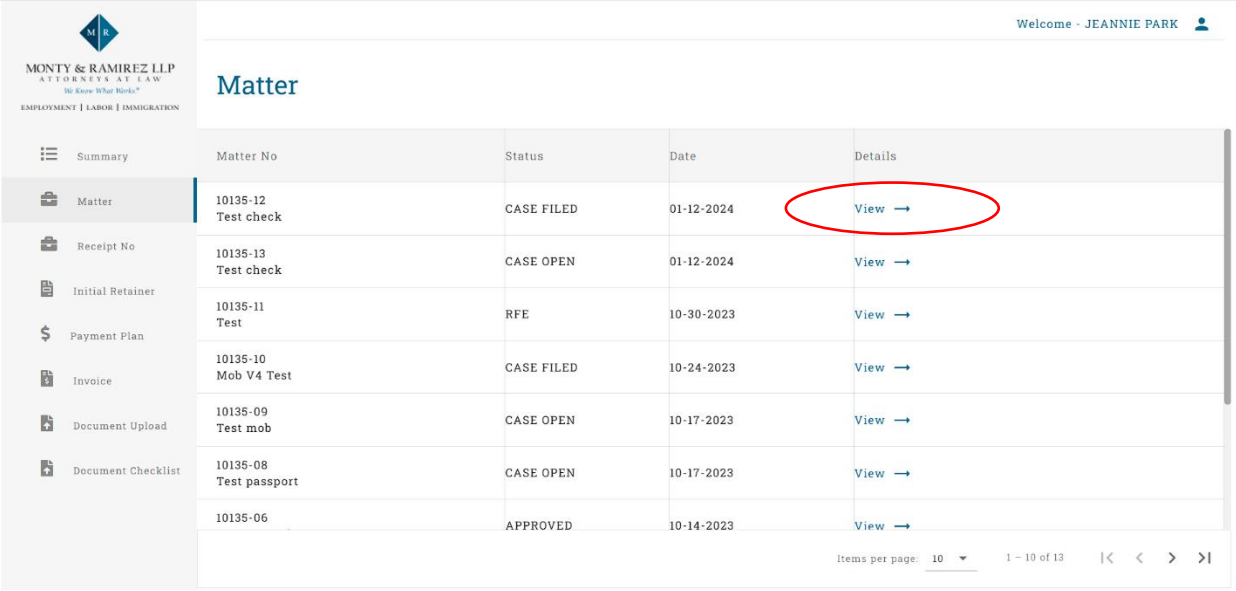
Clicking on the **Matter** option, this will appear as shown in the figure.

Initial API Call:

- https://mrclara.com:27070/mnrclara/api/services/mnr-setup-service/status [GET]
- https://mrclara.com:27070/mnrclara/api/services/mnr-management-service/mattergenacc/findMatterGeneralNew [POST]

  Body:

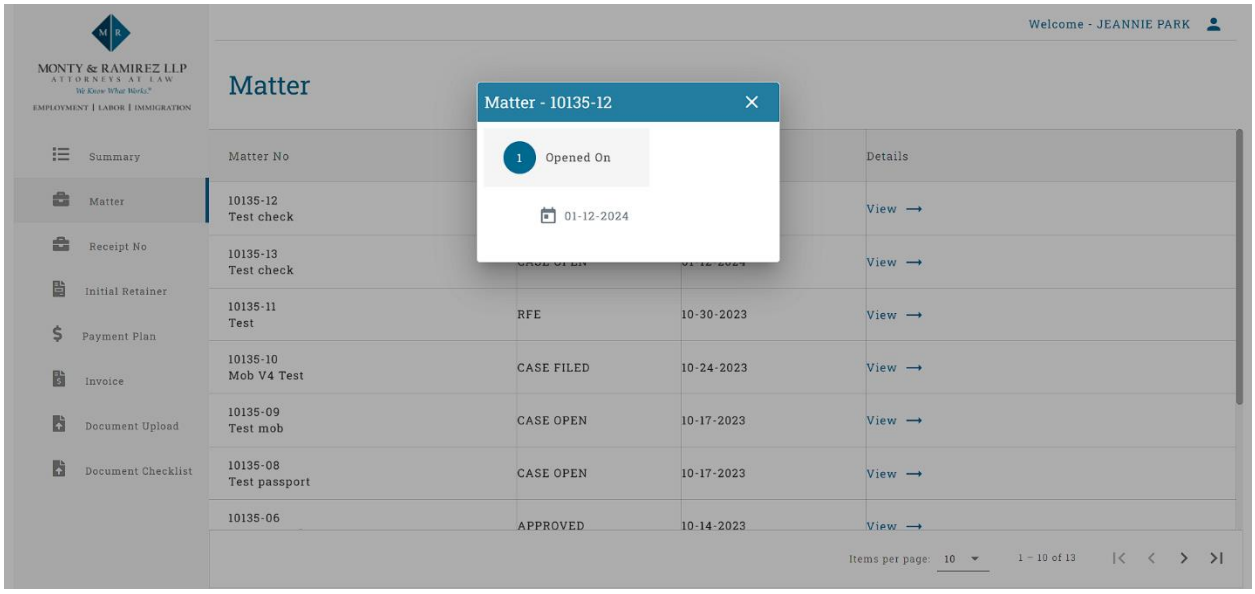
```
{
  "clientId": [
    "10135"
  ]
}
```



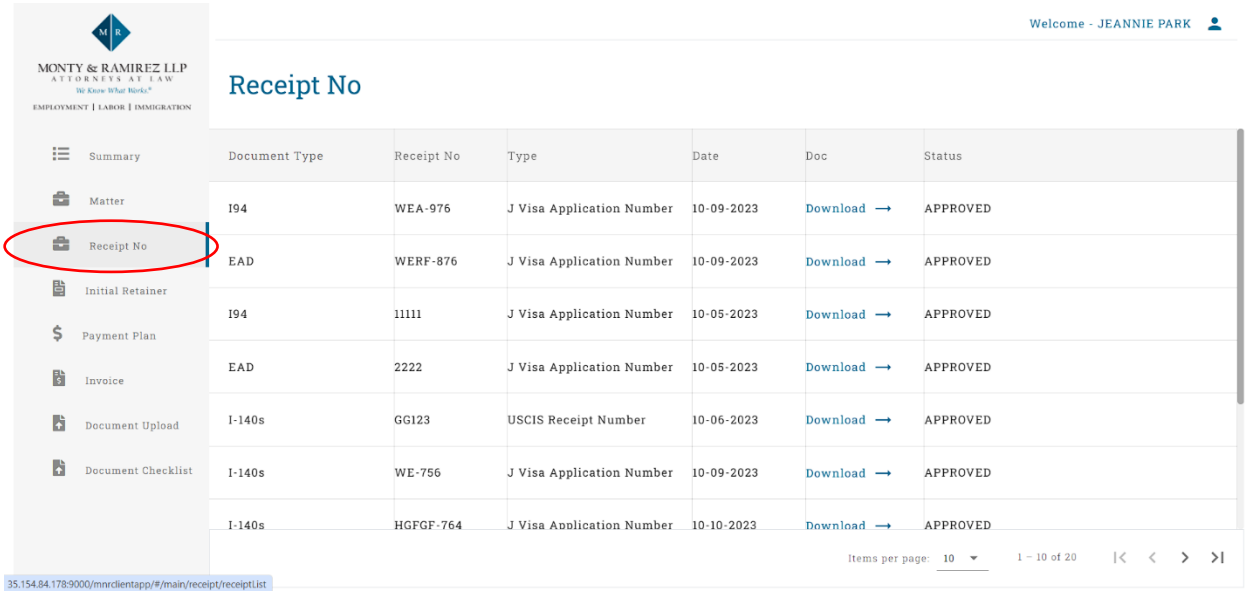
Clicking on the **Matter** option, this will appear as shown in the figure.

On-View API Call:

- https://mrclara.com:27070/mnrclara/api/services/mnr-management-service/mattergenacc/date/10135-12 [GET]



4. Receipt No

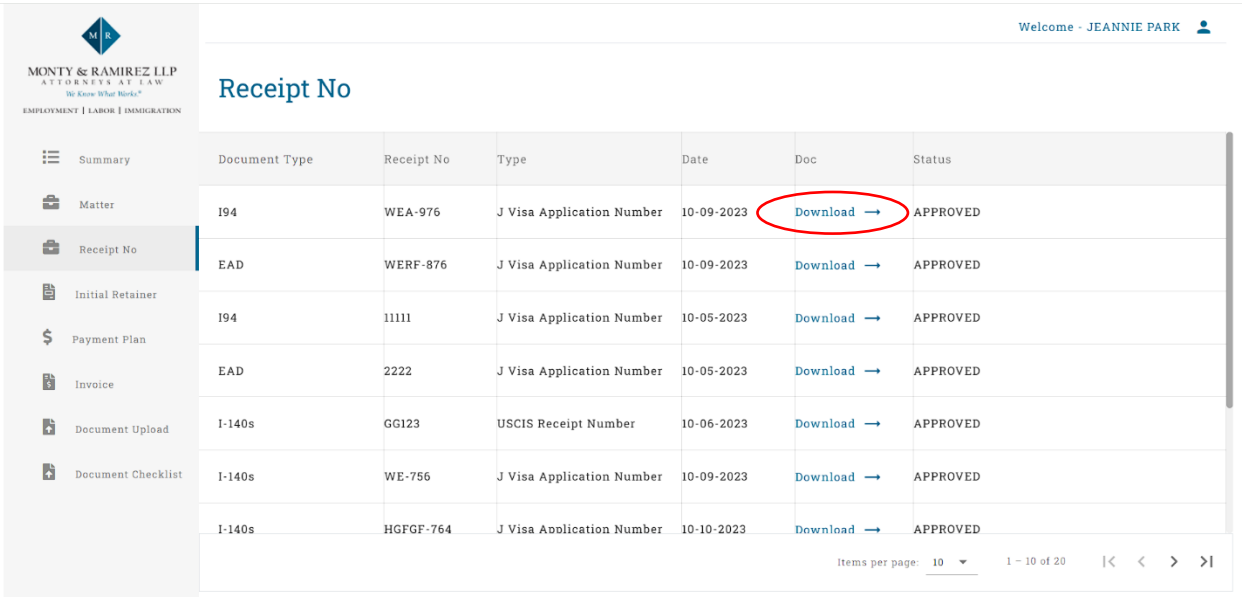


Clicking on the **Receipt No** option, this will appear as shown in the figure.

Initial API Call:

- https://mrclara.com:27070/mnrclara/api/services/mnr-setup-service/status [GET]
- https://mrclara.com:27070/mnrclara/api/services/mnr-management-service/receiptappnotice [GET]

Download



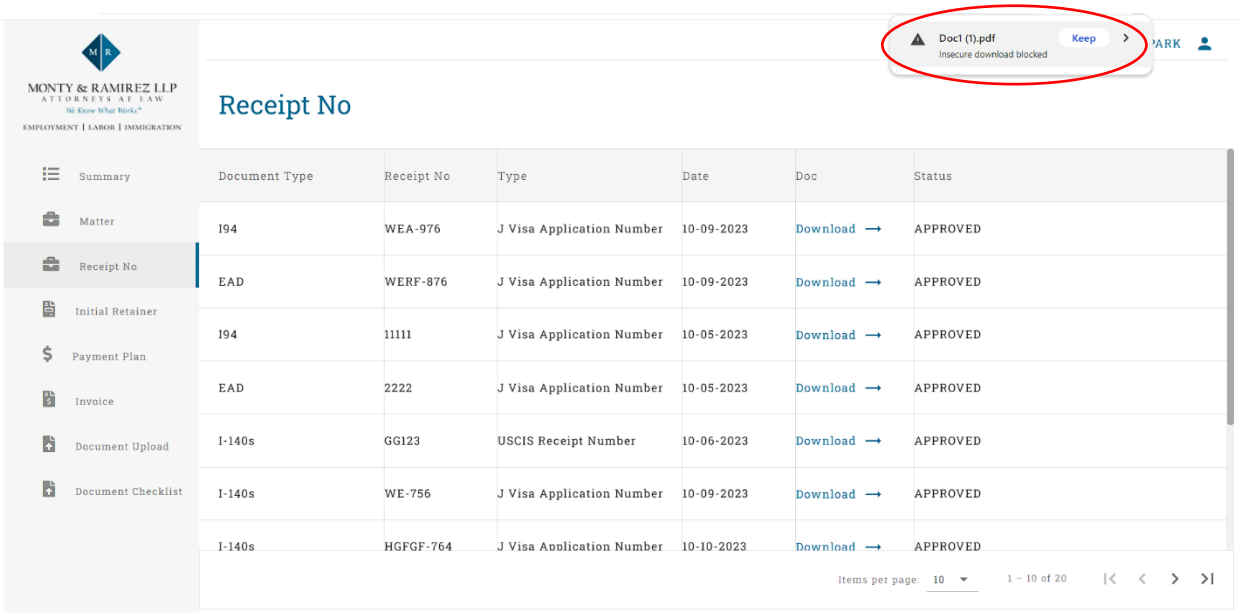
Clicking on the **Download** option, this will appear as shown in the figure.

On Download API Call:

- https://mrclara.com:27070/mnrclara/api/services/doc-storage/download [GET]

  Parameters:

  1. fileName:
  2. location:

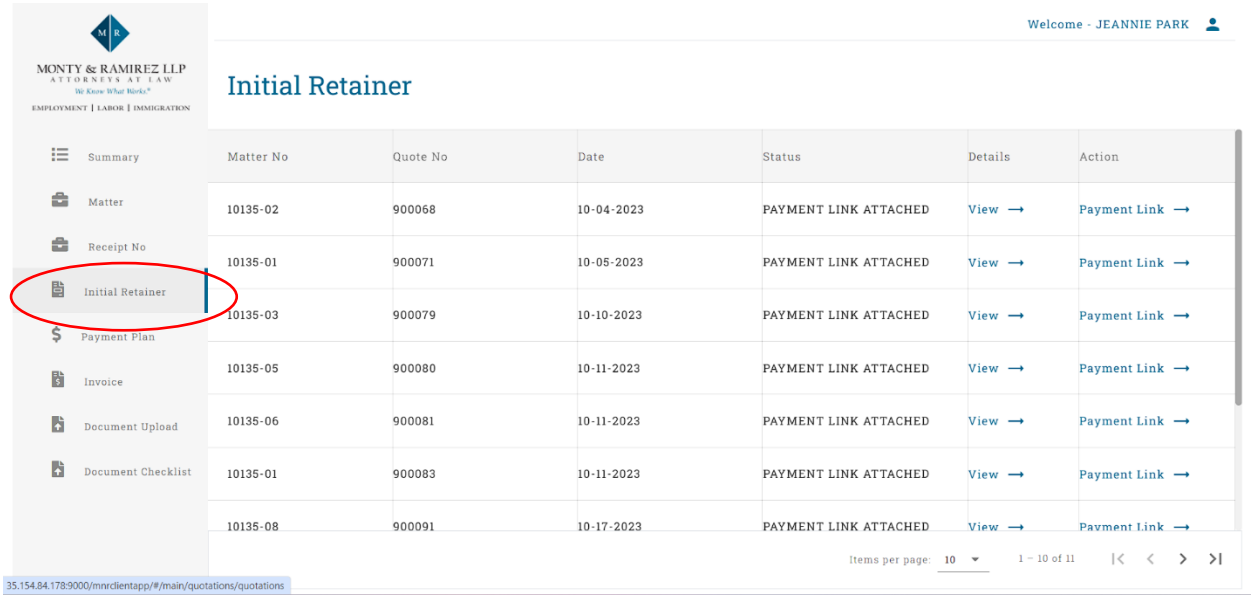


5. Initial Retainer

Functional Specification

UI Label	Field Name	Logic
Matter No	MATTER_NO	Pass the CLIENT_ID in QUOTEHEADER table and fetch list of MATTER_NO and display
Quote No	QUOTE_NO	Fetch QUOTE_NO only for the latest REV_NO for the corresponding MATTER_NO from QUOTEHEADER table
Date	QUOTE_DATE	Fetch QUOTE_DATE for the corresponding QUOTE_NO from QUOTEHEADER table
Quote amount	QUOTE_AMT	Fetch QUOTE_AMT for the corresponding QUOTE_NO from QUOTEHEADER table
Details		On selecting this button, display corresponding Quote_No output form in PDF
Approve		On Clicking this button Call QUOTATION patch API and update STATUS_ID as 10. This button to be disabled when STATUS_ID of the selected QUOTE_NO is 10

Technical Specification



Clicking on the **Initial Retainer** option, this will appear as shown in the figure.

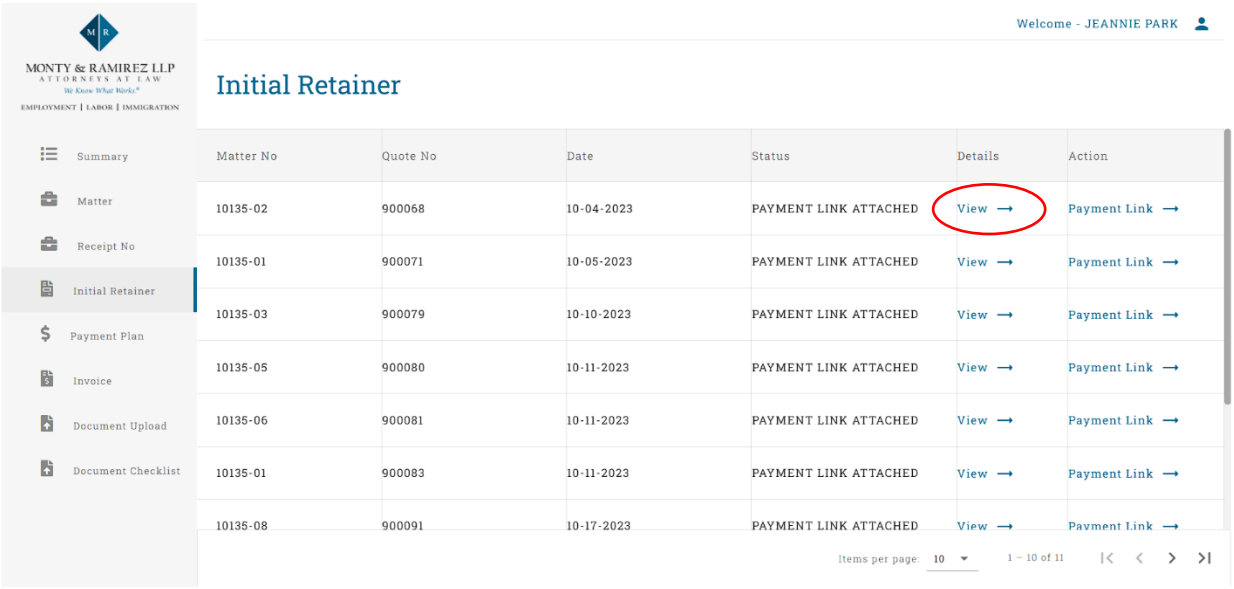
Initial API Call:

- https://mrclara.com:27070/mnrclara/api/services/mnr-setup-service/status [GET]
- https://mrclara.com:27070/mnrclara/api/services/mnr-accounting-service/quotationheader/findQuotationHeader [POST]

Body:

```
{
   "clientId": [
      "10135"
   ]
}
```

View



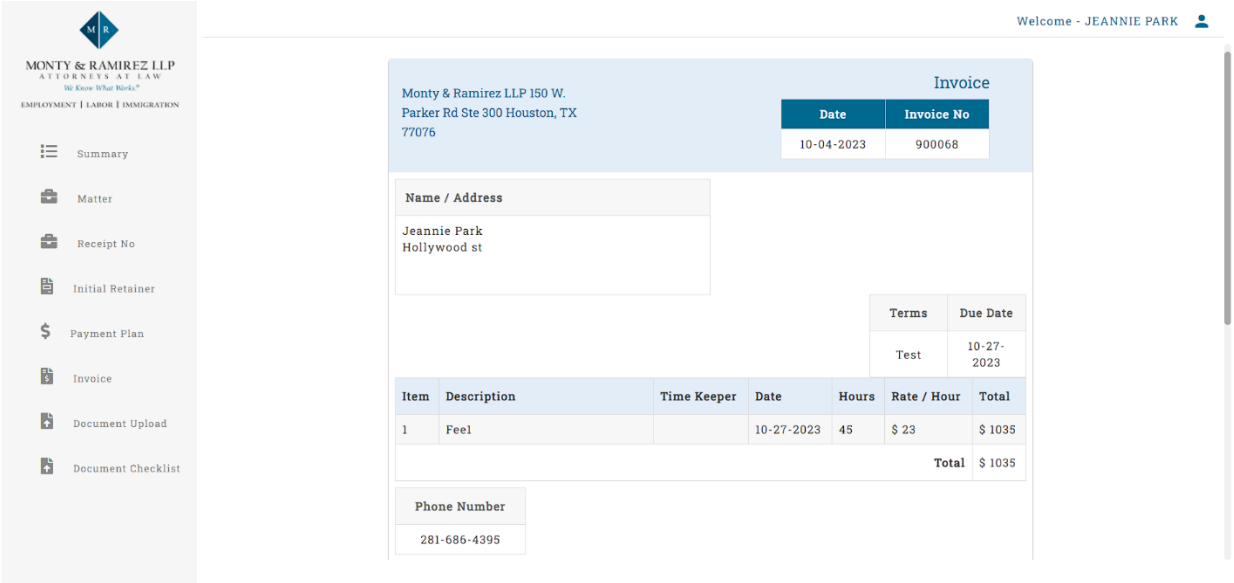
Clicking on the **View** option, this will appear as shown in the figure.

On-View API Call:

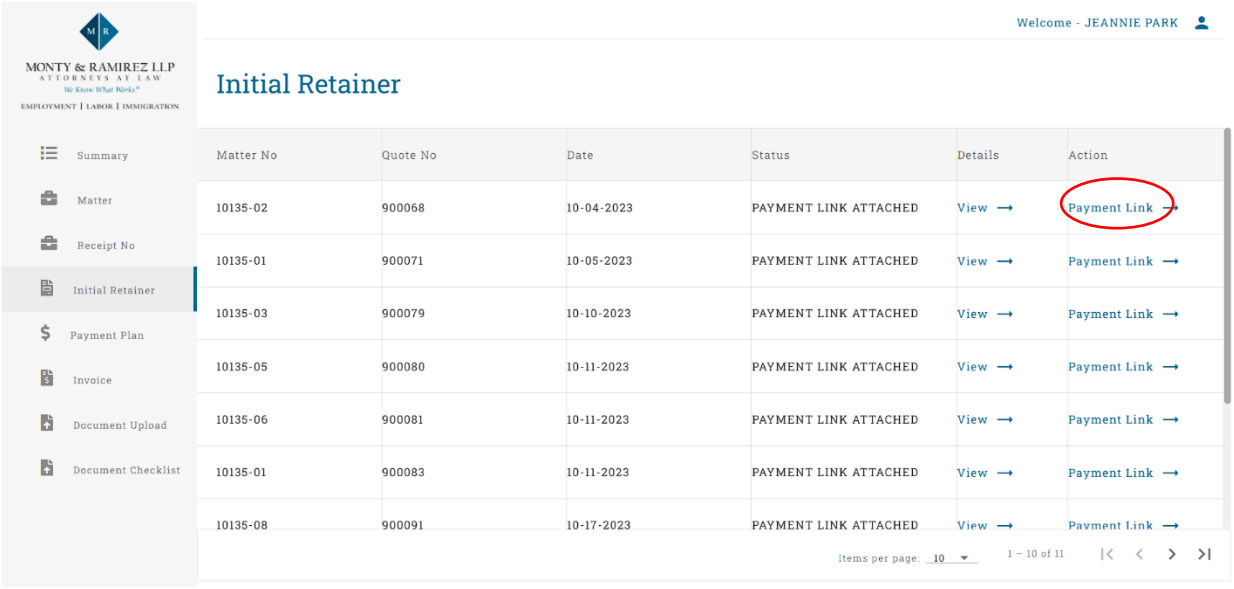
- https://mrclara.com:27070/mnrclara/api/services/mnr-accounting-service/quotationheader/900068 [GET]
- https://mrclara.com:27070/mnrclara/api/services/mnr-management-service/clientgeneral/10135 [GET]

Parameter:

quotationRevisionNo



Payment Link



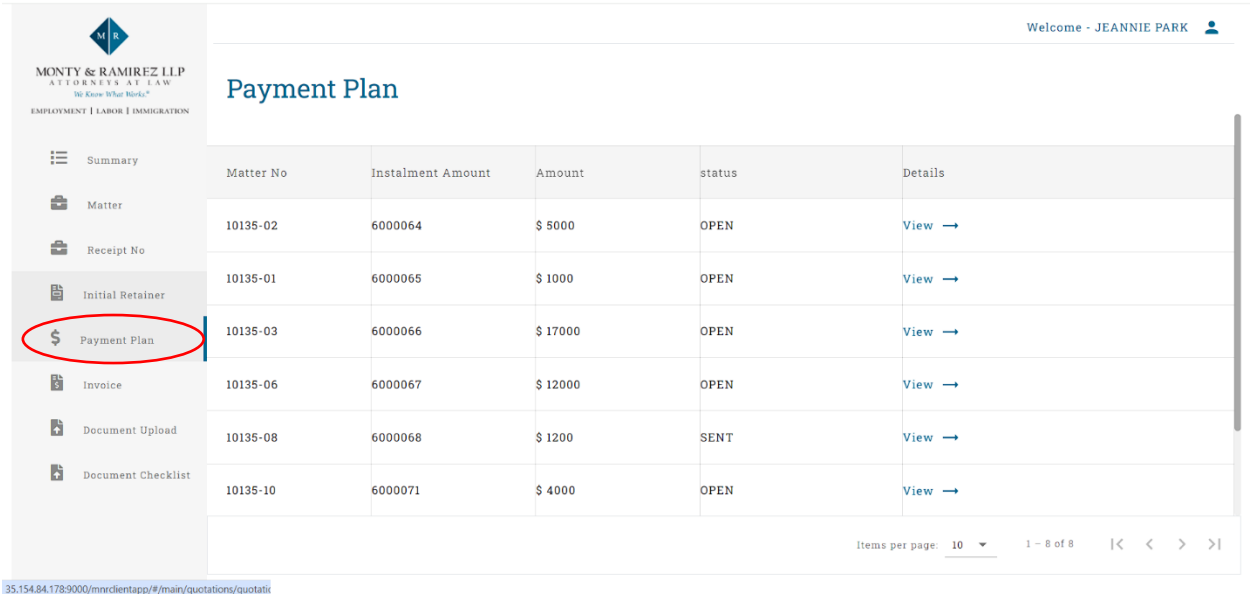
Clicking on the **payment link** option will route to payment window

6. Payment Plan

Functional Specification

UI Label	Field Name	Logic
Matter	MATTER_NO	Pass the CLIENT_ID in PAYMENTPLAN HEADER table and fetch list of MATTER_NO and display
Payment plan No	PAYMENT_PLAN_NO	Fetch PAYMENT_PLAN_NO for Corresponding MATTER_NO from PAYMENTPLAN HEADER table
Date	PAYMENT_PLAN_DATI	Fetch PAYMENT_PLAN_DATE for Corresponding MATTER_NO from PAYMENTPLAN HEADER table
Status	STATUS_ID	Fetch STATUS_ID for Corresponding MATTER_NO from PAYMENTPLAN HEADER table
Details		On selecting this button, open a new screen with below details
Payment plan No	PAYMENT_PLAN_NO	Selected PAYMENT_PLAN_NO
Payement Plan Amount	PAYMENT_PLAN_AMT	Fetch PAYMENT_PLAN_AMT for Corresponding PAYMENT_PLAN_NO from PAYMENTPLAN HEADER table
No of Installments	No_of_instal	Fetch NO_OF_INSTAL for Corresponding PAYMENT_PLAN_NO from PAYMENTPLAN HEADER table
Installment No	ITEM_NO	Fetch ITEM_NO for Corresponding PAYMENT_PLAN_NO from PAYMENTPLAN LINE table
Installment Amount	DUE_AMT	Fetch DUE_AMT for Corresponding ITEM_NO from PAYMENTPLAN LINE table
Due Date	DUE_DATE	Fetch DUE_DATE for Corresponding ITEM_NO from PAYMENTPLAN LINE table
Balance Amount	Remaining_Due_Now	Fetch REMAINING_DUE_NOW for Corresponding ITEM_NO from PAYMENTPLAN LINE table

Technical Specification

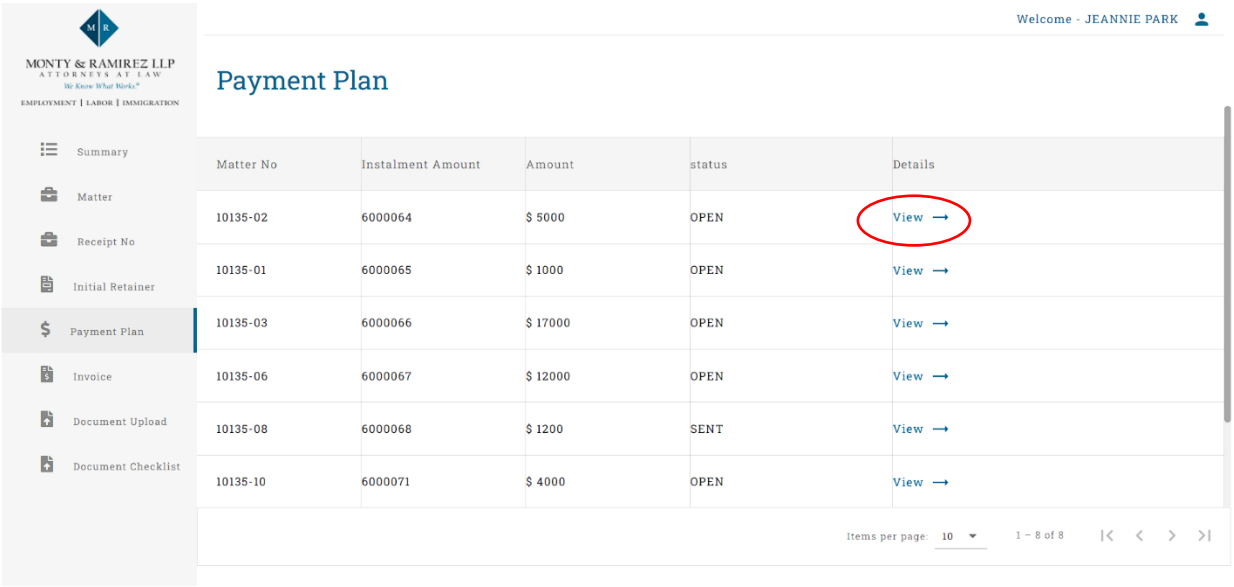


Clicking on the **Payment Plan** option, this will appear as shown in the figure.

Initial API Call:

- https://mrclara.com:27070/mnrclara/api/services/mnr-setup-service/status [GET]
- https://mrclara.com:27070/mnrclara/api/services/mnr-accounting-service/paymentplanheader [GET]

View

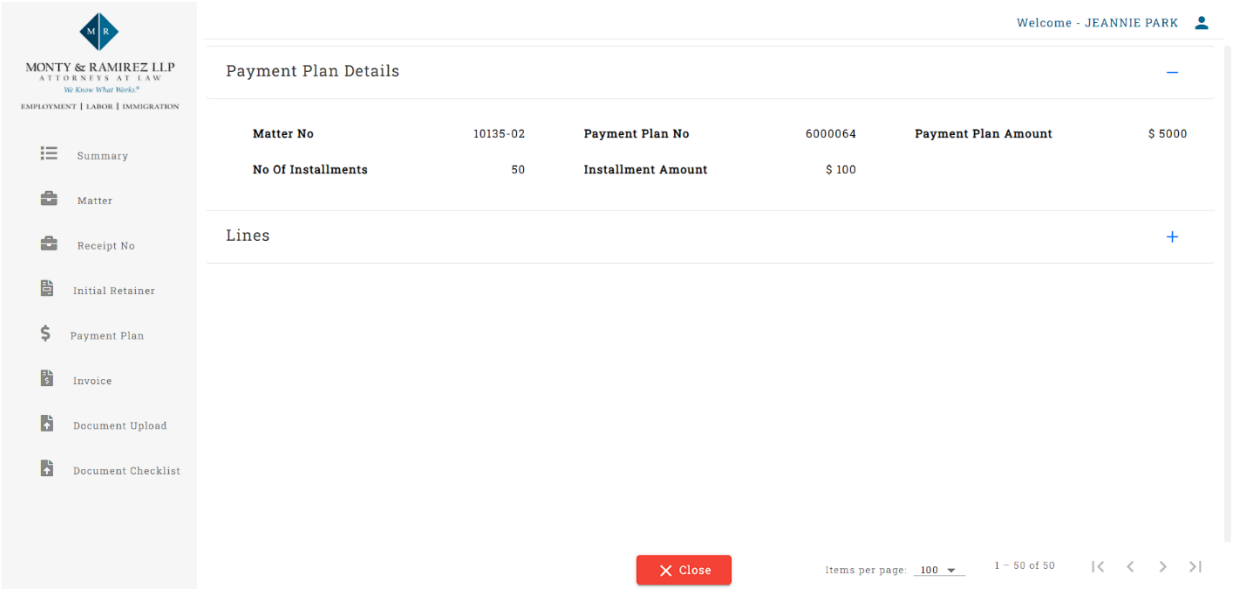


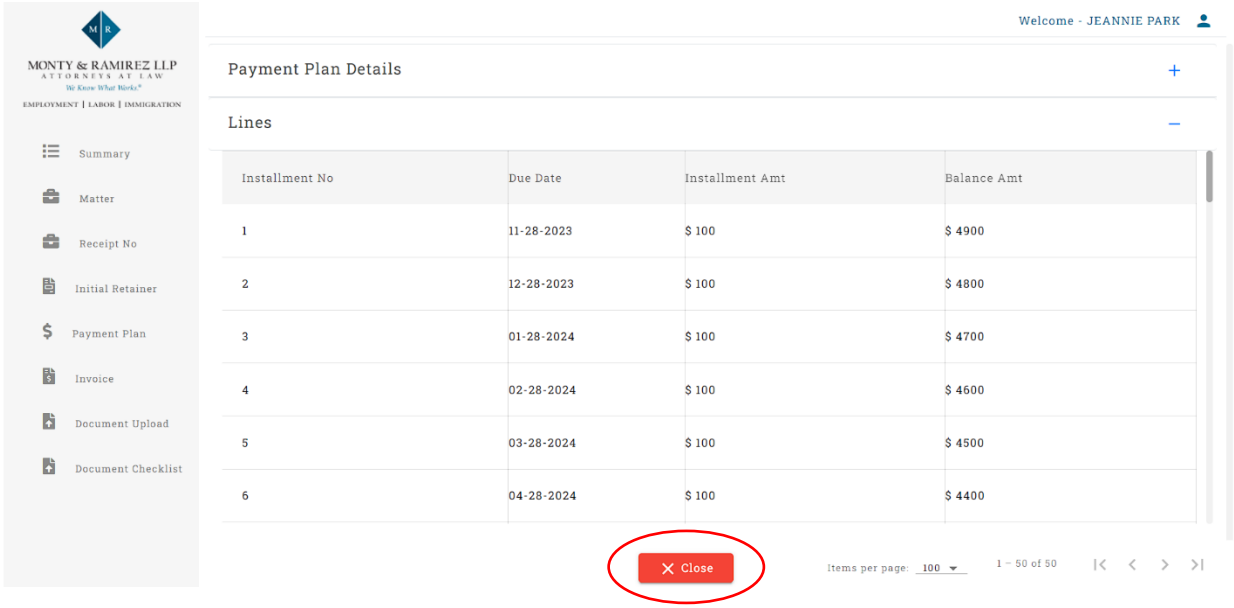
Clicking on the **view** option, this will appear as shown in the figure.

On-View API Call:

- https://mrclara.com:27070/mnrclara/api/services/mnr-accounting-service/paymentplanheader/6000064 [GET]

  Parameter:
  paymentPlanRevisionNo





Installment No	Due Date	Installment Amt	Balance Amt
1	11-28-2023	$ 100	$ 4900
2	12-28-2023	$ 100	$ 4800
3	01-28-2024	$ 100	$ 4700
4	02-28-2024	$ 100	$ 4600
5	03-28-2024	$ 100	$ 4500
6	04-28-2024	$ 100	$ 4400

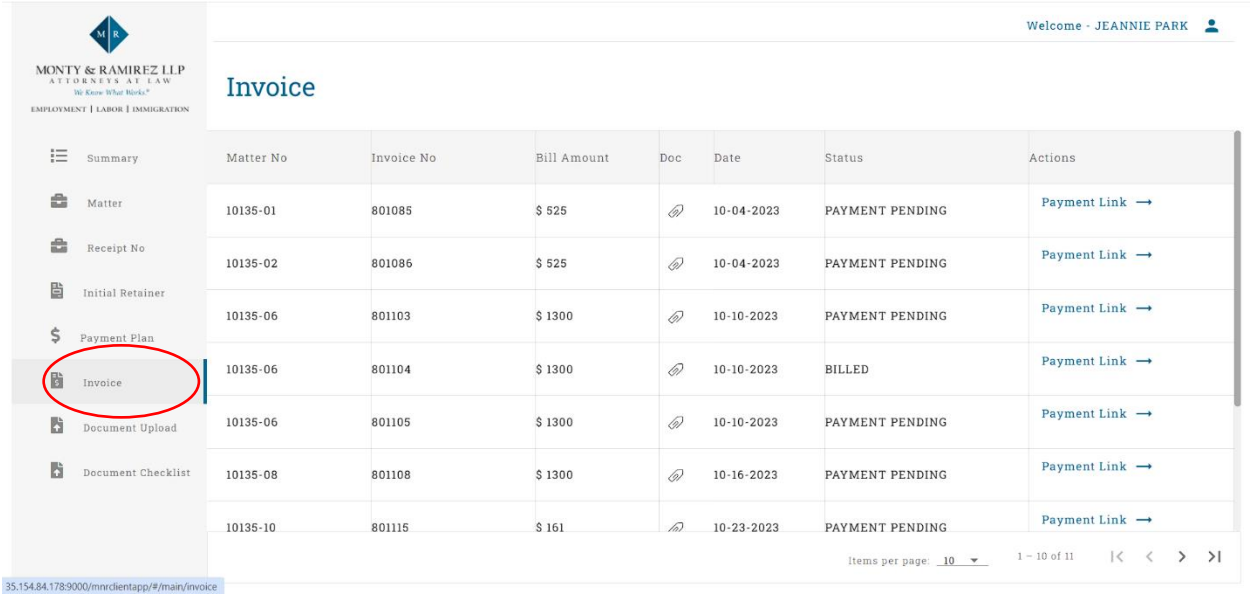
`

7. Invoice

Functional Specification

UI Label	Field Name	Logic
Matter	MATTER_NO	Pass the CLIENT_ID in PAYMENTPLAN HEADER table and fetch list of MATTER_NO and display
Invoice	INVOICE_NO	
Date	POSTING_DATE	
Status	STATUS_ID	
Billed Amount	INVOICE_AMT	
Details		On selecting this button, display corresponding INVOICE_NO output form in PDF
Proceed to Pay		On Clicking this button get Payment Link from QuickBooks and open Payment URL in a separate tab. This button to be disabled when STATUS is "PAID"

Technical Specification



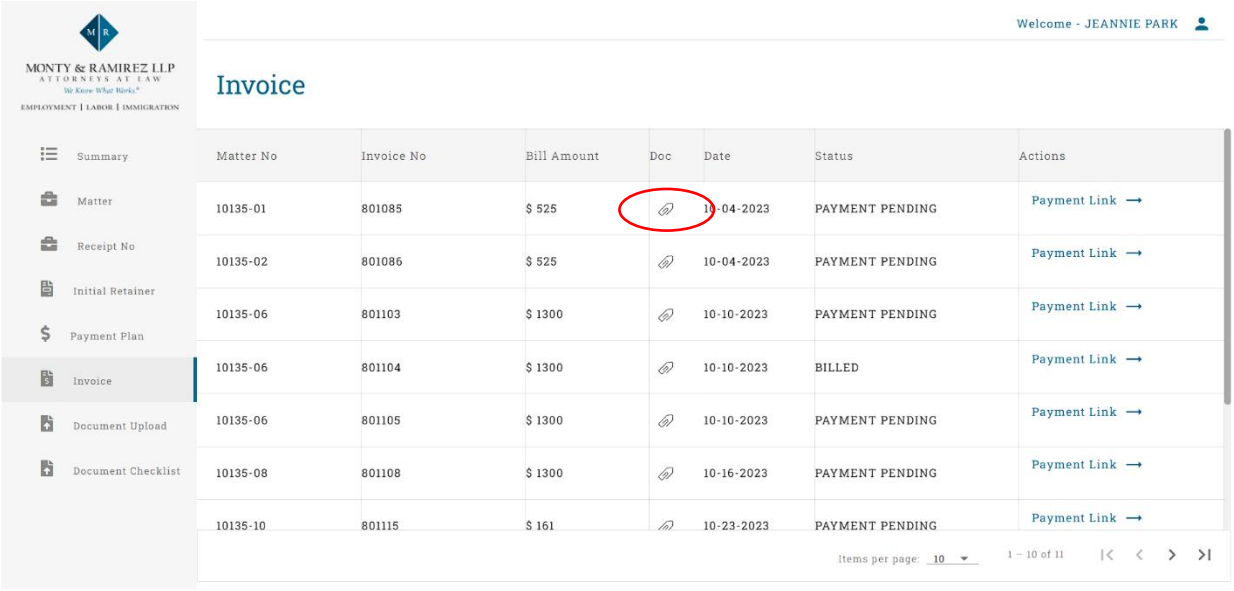
Clicking on the **Invoice** option, this will appear as shown in the figure.

Initial API Call:

- https://mrclara.com:27070/mnrclara/api/services/mnr-accounting-service/invoiceheader/findInvoiceHeader [POST]
  Body:

```
{
  "clientId": [
    "10135"
  ]
}
```

Doc



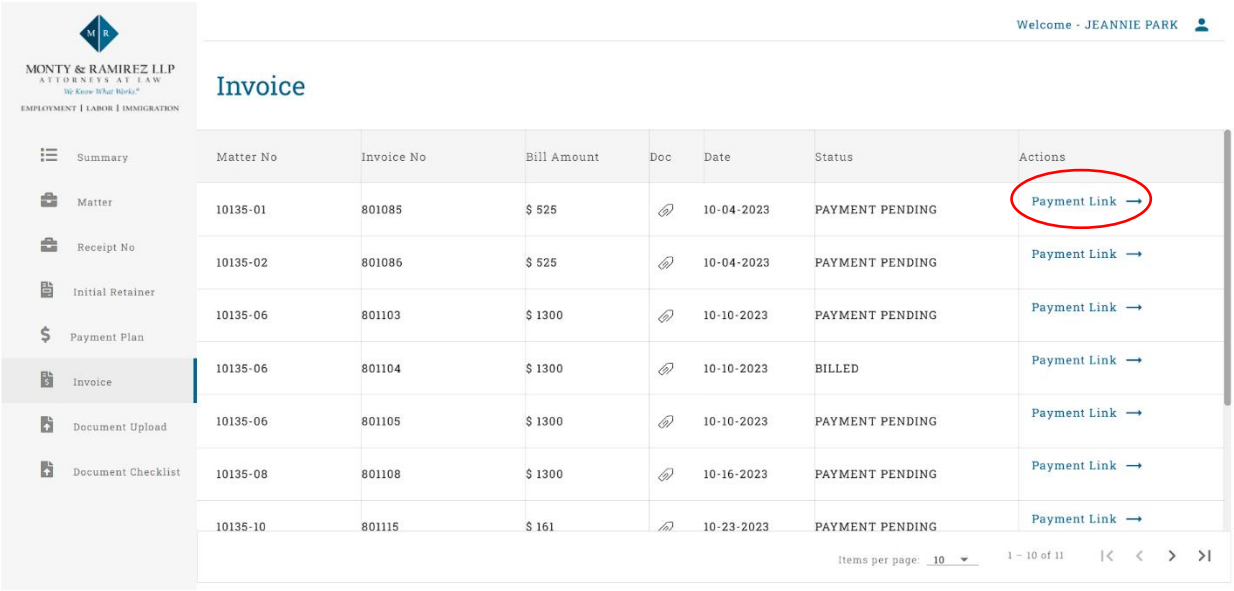
Clicking on the **pin** icon, this will appear as shown in the figure.

Initial API Call:

- https://mrclara.com:27070/mnrclara/api/services/mnr-accounting-service/outputforms/invoice [GET]

  Parameter:
  invoiceNumber

Payment Link



Clicking on the **payment link** option will route to payment window

8. Document Upload

Functional Specification

Documents from M&R

UI Label	Field Name	Logic
Matter	MATTER_NO	Pass CLIENT_ID in MATTERDOCUMENT table and fetch MATTER_NO where REF_FIELD_1 value is FALSE
Document Name	DOC_TEXT	Pass CLIENT_ID/MATTER_NO in MATTERDOCUMENT table and fetch DOC_NO , Pass this DOC_NO in DOCUMENTTEMPLATE table and fetch DOC_TEXT value and display
Received Date	SENT_ON	Fetch SENT_ON Field value from MATTERDOCUMENT table by Passing MATTER_NO/CLIENT_ID
Details	DOC_URL	Downlaod the File from Drop box and display by passing DOC_URL

Documents Upload

UI Label	Field Name	Logic
Matter	MATTER_NO	Pass CLIENT_ID in MATTERGENACC table and fetch MATTER_NO values where STATUS_ID is not equal to 30and display in drop down
Choose File	DOC_URL	Open the file by selecting the folder and upload the file, save the file in sharedrive in the Menu path - CLIENTPORTALDOCUMENTS/CLIENT_ID/MATTER_NO

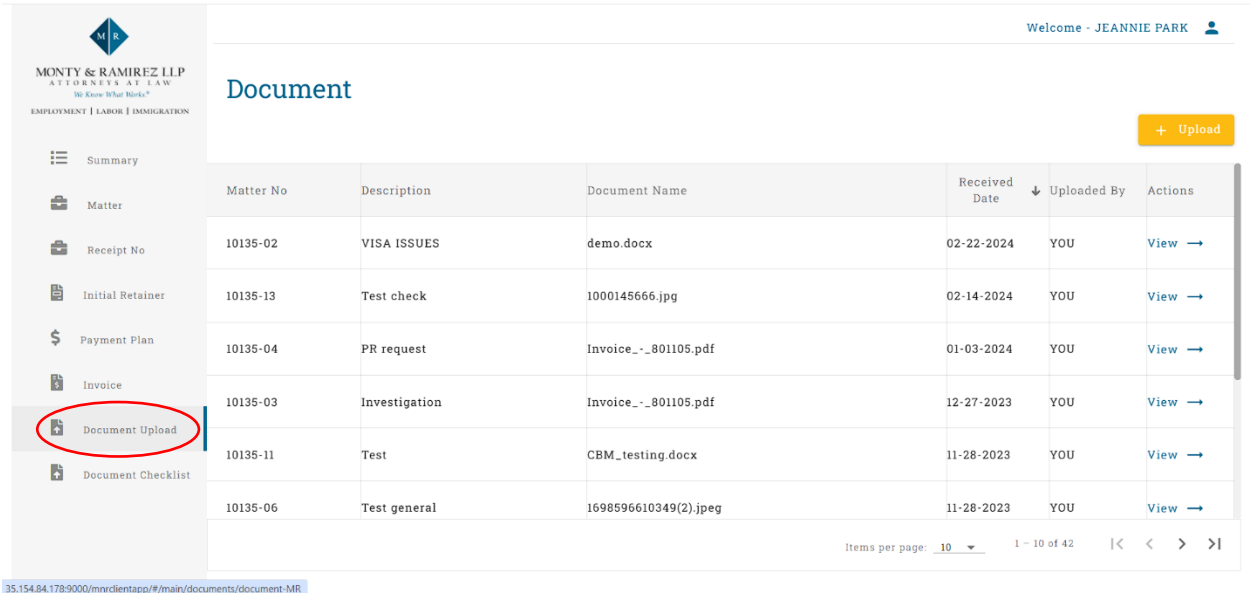
On Clicking Upload button, insert a record MATTERDOCUMENT table as below

CLIENT_ID	MATTERDOCUMENT	Logged in USER's CLIENT_ID from CLIENTUSER table
CLIENT_USR_ID	MATTERDOCUMENT	Logged in CLIENT_USR_ID
DOC_NO	MATTERDOCUMENT	Pass CLASS_ID=03, NUM_RAN_CODE=21 in NUMBERRANGE table and Fetch NUM_RAN_CURRENT values and add +1 and then insert
DOC_URL	MATTERDOCUMENT	DOC_URL of the sharedrive file
MATTER_NO	MATTERDOCUMENT	MATTER_NO passed from UI
MAIL_MERGE	MATTERDOCUMENT	Hardcoded Value "FALSE"
DOC_DATE_TIME	MATTERDOCUMENT	Server Date and Time
LANG_ID	MATTERDOCUMENT	Hard Coded Value "EN"
CLASS_ID	MATTERDOCUMENT	Pass MATTER_NO in MATTERGENERALACC table and fetch CLASS_ID
DOC_URL_VER	MATTERDOCUMENT	Hard Coded Value "1"
STATUS_ID	MATTERDOCUMENT	Hard Coded Value "23"
RECEIVED_ON	MATTERDOCUMENT	Server Date and Time
CTD_BY	MATTERDOCUMENT	CLIENT_ID
CTD_ON	MATTERDOCUMENT	Server Date and Time
REF_FIELD_2	MATTERDOCUMENT	Hard Coded Value "CLIENTPORTAL"

Document List Page

UI Label	**Field Name**	**Logic**
Matter	MATTER_NO	Pass CLIENT_ID in MATTERDOCUMENT table and fetch MATTER_NO where REF_FIELD_2 value is Not null and display
Description	DOC_URL	Pass MATTER_NO in MATTERDOCUMENT table and fetch DOC_URL file and display
Date	RECEIVED_ON	Pass MATTER_NO in MATTERDOCUMENT table and fetch RECEIVED_ON date
Status	STATUS_ID	Highlight Green indicator with STATUS_ID=23

Technical Specification



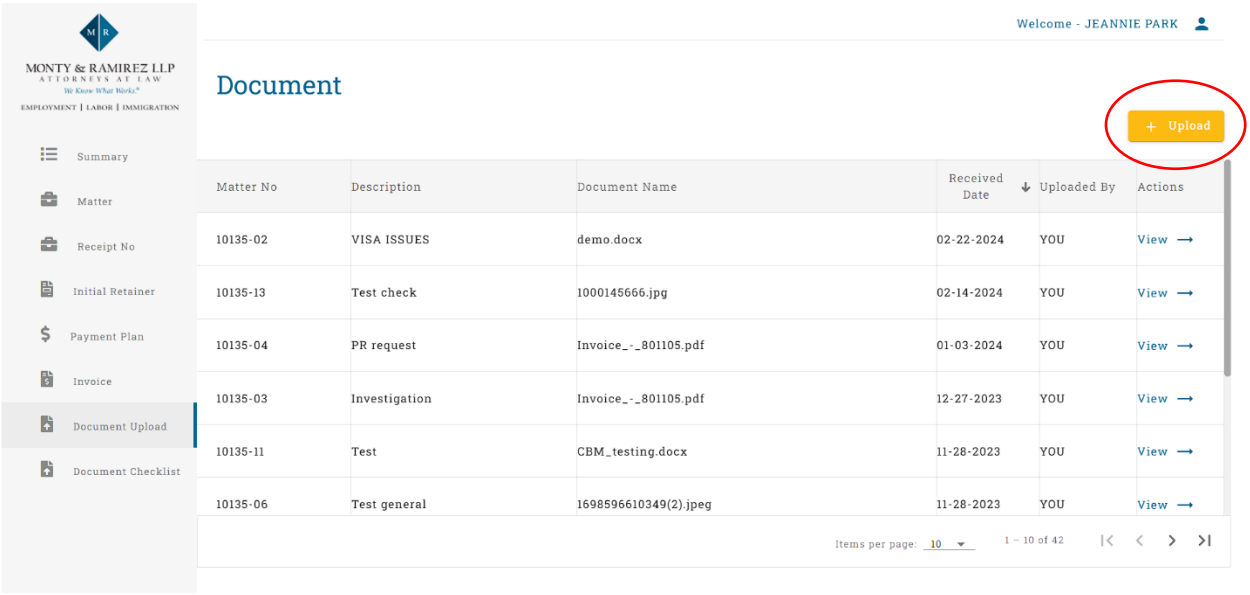
Clicking on the **Document upload** option, this will appear as shown in the figure.

Initial API Call:

- https://mrclara.com:27070/mnrclara/api/services/mnr-setup-service/documentTemplate [GET]
- https://mrclara.com:27070/mnrclara/api/services/mnr-management-service/matterdocument [GET]
- https://mrclara.com:27070/mnrclara/api/services/mnr-management-service/mattergenacc/findMatterGenAccs [POST]

Body:

```
{
  "clientId": [
    "10135"
  ]
}
```



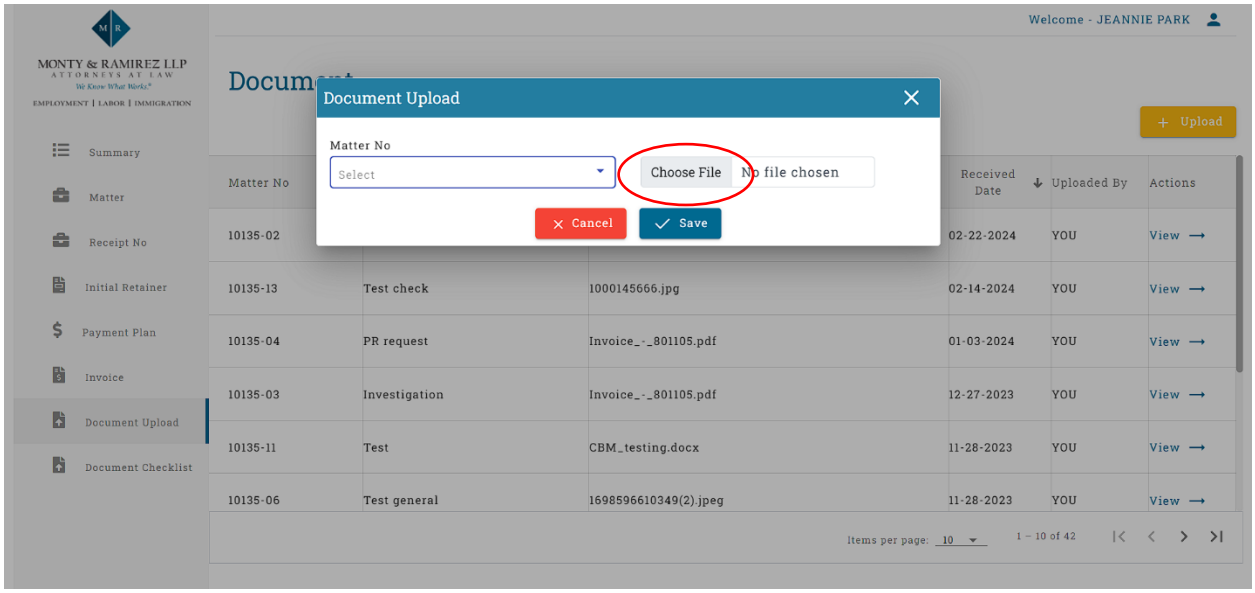
Clicking on the **upload** option, this will appear as shown in the figure.

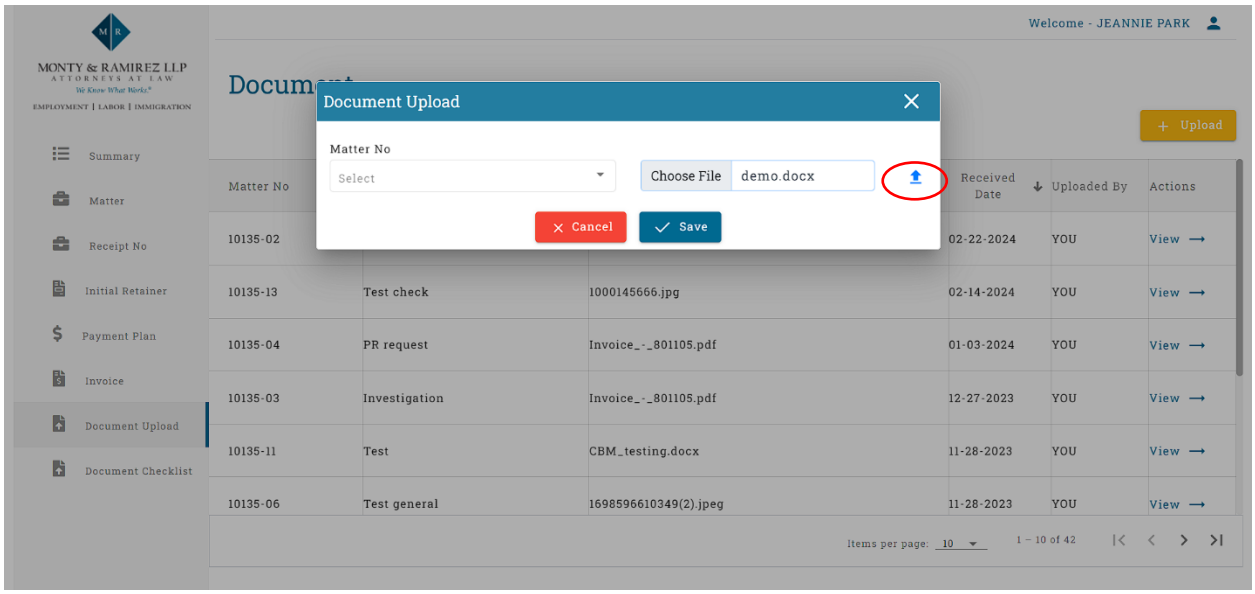
Initial API Call:

- https://mrclara.com:27070/mnrclara/api/services/mnr-management-service/mattergenacc/findMatterGenAccs [POST]

  Body:

  ```
  {
     "clientId": [
        "10135"
     ]
  }
  ```



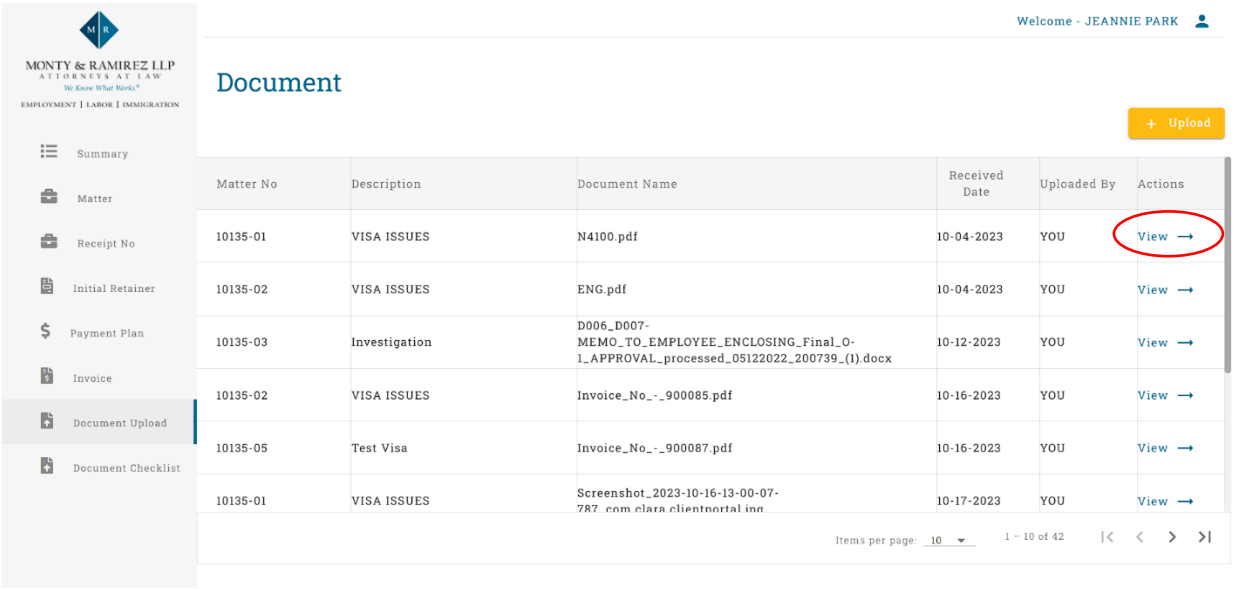


Clicking on the **upload** icon, this will appear as shown in the figure.

Initial API Call:

- https://mrclara.com:27070/mnrclara/api/services/mnr-management-service/mattergenacc/undefined [GET]

View



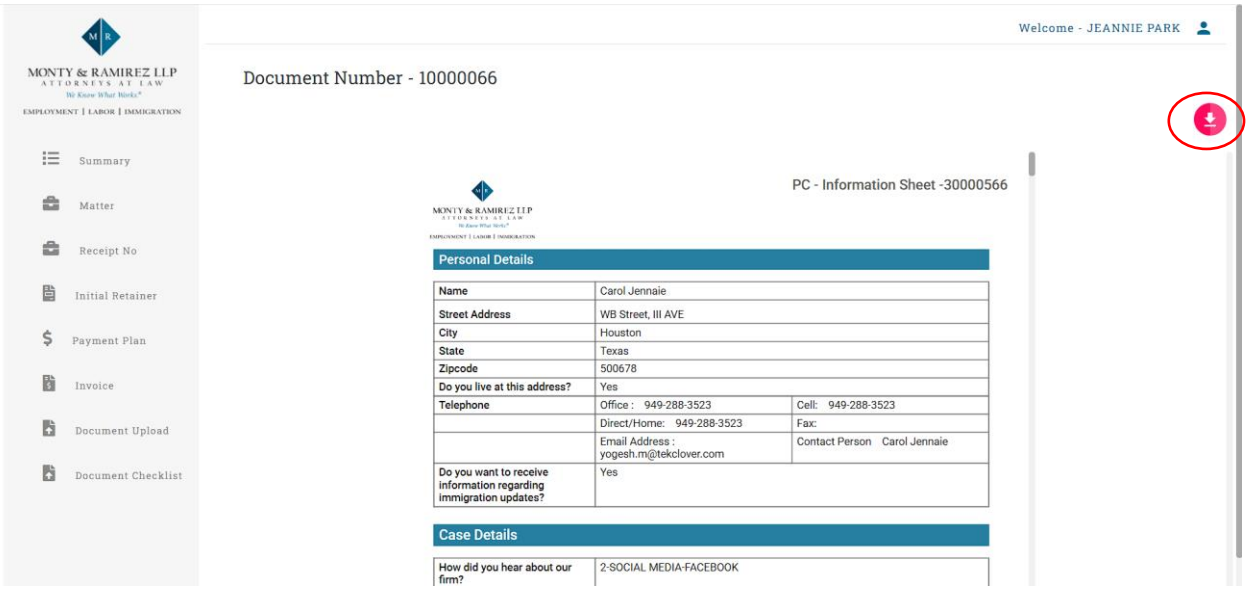
Clicking on the **view** option, this will appear as shown in the figure.

Initial API Call:

- https://mrclara.com:27070/mnrclara/api/services/mnr-management-service/matterdocument/1696399238939 [GET]
- https://mrclara.com:27070/mnrclara/api/services/doc-storage/download [GET]

Parameters

1. **fileName**
2. **location**
3. **classId**


MONTY & RAMIREZ LLP
ATTORNEYS AT LAW
We Know What Works.®
EMPLOYMENT | LABOR | IMMIGRATION
Summary
Matter
Receipt No
Initial Retainer
Payment Plan
Invoice
Document Upload
Document Checklist
Welcome - JEANNIE PARK
Document Number - 10000066
PC - Information Sheet -30000566
Personal Details
Name
Carol Jennaie
Street Address
WB Street, III AVE
City
Houston
State
Texas
Zipcode
500678
Do you live at this address?
Yes
Telephone
Office : 949-288-3523
Cell: 949-288-3523
Direct/Home: 949-288-3523
Fax:
Email Address : yogesh.m@tekclover.com
Contact Person Carol Jennaie
Do you want to receive information regarding immigration updates?
Yes
Case Details
How did you hear about our firm?
2-SOCIAL MEDIA-FACEBOOK

9. Document CheckList

Functional Specification

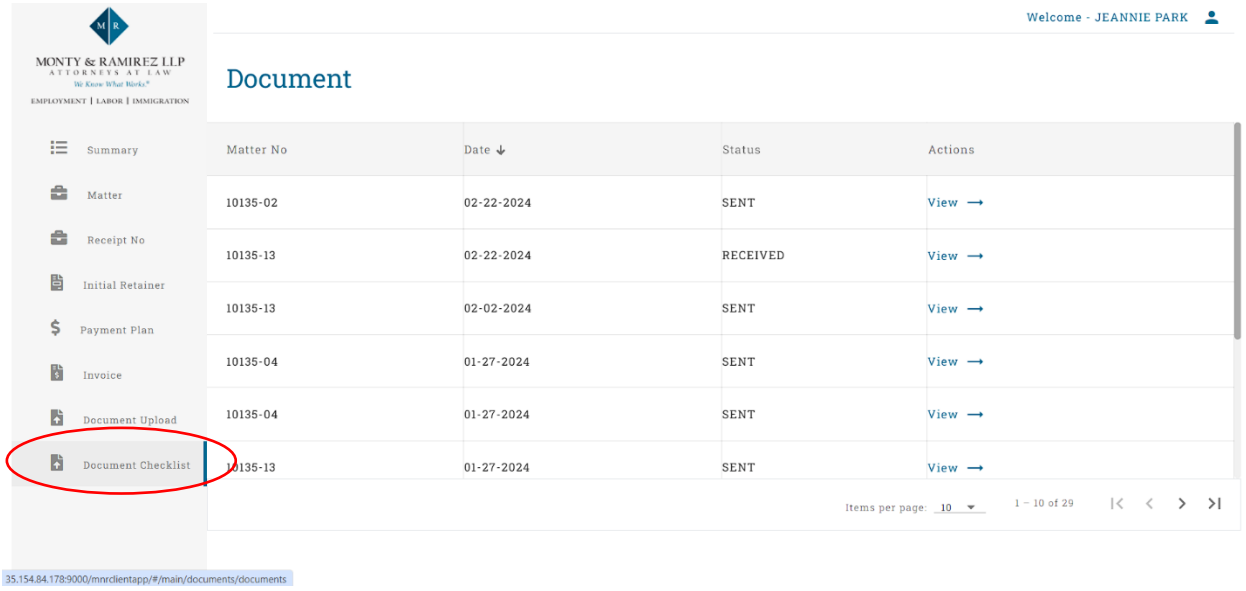
List Page

UI Label	Field Name	Logic
Matter	MATTER_NO	Pass CLIENT_ID in MATTERDOCCHECKLISTHEADER table and fetch MATTER_NO and display
Description	MATTER_TEXT	Pass MATTER_NO in MATTERGENACC table and fetch MATTER_TEXT and display
Status	STATUS_ID	If STATUS_ID=22, highlight in RED and STATUS_ID=23, highlight in Green
Details		Pass MATTER_NO in MATTERDOCCHECKLISTHEADER table and fetch CHK_LIST_NO. Pass CHK_LIST_NO and fetch SEQ_NO and DOC_NAME
Upload file	RECEIVED_DOC_URL	1. On Clicking this icon, open a file location in local drive to upload the documents, Note:All the file types to be supported. 2. Once the file is uploaded, save the document in a temporary folder (Folder Name will be MATTER_NO&CHK_LIST_NO. 3. If a document is deleted before the final Submission, delete the document from Staging folder 2. Once all the Files are uploaded successfully and on clicking submit button, Validated all the documents upload in UI and then store the file in share drive under CLIENTPORTALDOCUMENTS/CLIENT_ID/MATTER_NO. IF the folder is not available, then create a new folder

on clicking save, pass the CLIENT_ID/MATTER_NO/CHK_LIST_NO in MATTERDOCLISTHEADER table and update RECEIVED_ON as Server Date and Time and STATUS_ID as 23

Pass CHK_LIST_NO in MATTERDOCLISTLINE table and update RECEIVED_DOC_URL against each SEQ_NO/DOC_NAME and update STATUS_ID as 23

Technical Specification



Clicking on the **Document CheckList** icon, this will appear as shown in the figure.

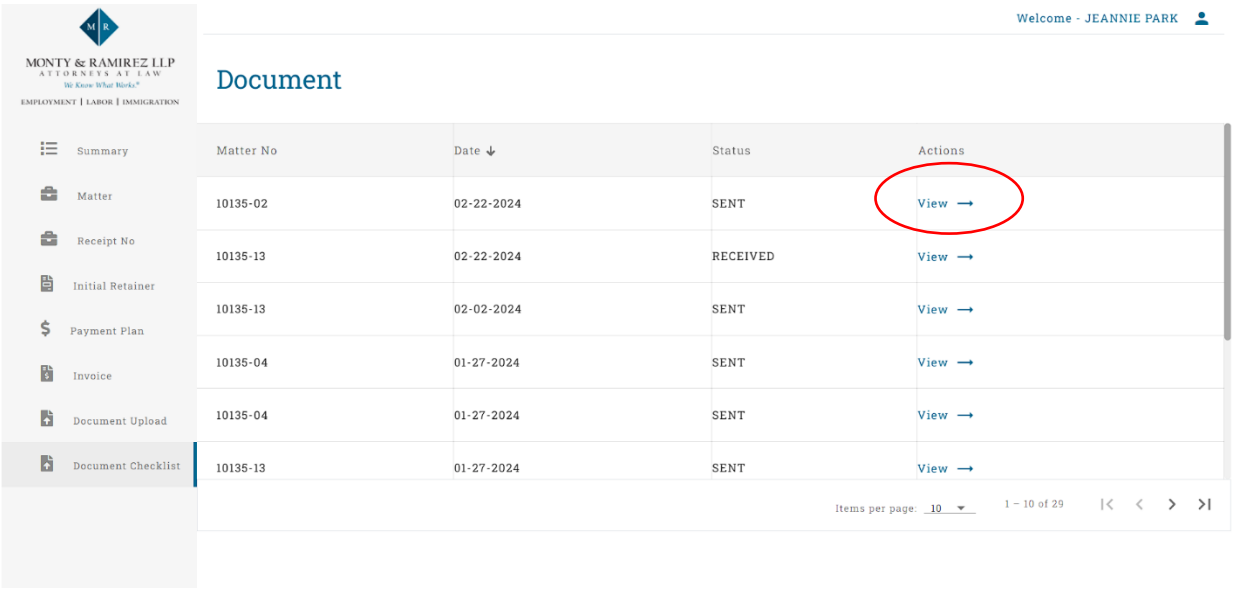
Initial API Call:

- https://mrclara.com:27070/mnrclara/api/services/mnr-setup-service/class [GET]
- https://mrclara.com:27070/mnrclara/api/services/mnr-setup-service/caseCategory [GET]
- https://mrclara.com:27070/mnrclara/api/services/mnr-setup-service/caseSubcategory [GET]
- https://mrclara.com:27070/mnrclara/api/services/mnr-management-service/matterdoclistheader/find [POST]

Body:

```
{
  "clientId": [
    "10135"
  ]
}
```

View



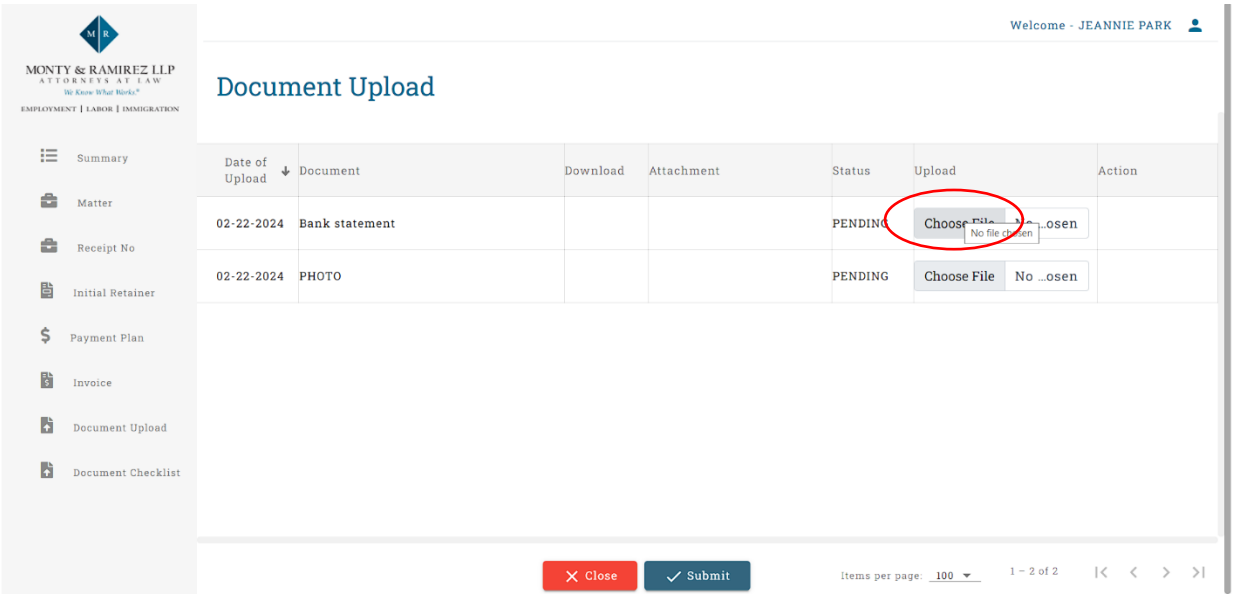
Clicking on the **view** option, this will appear as shown in the figure.

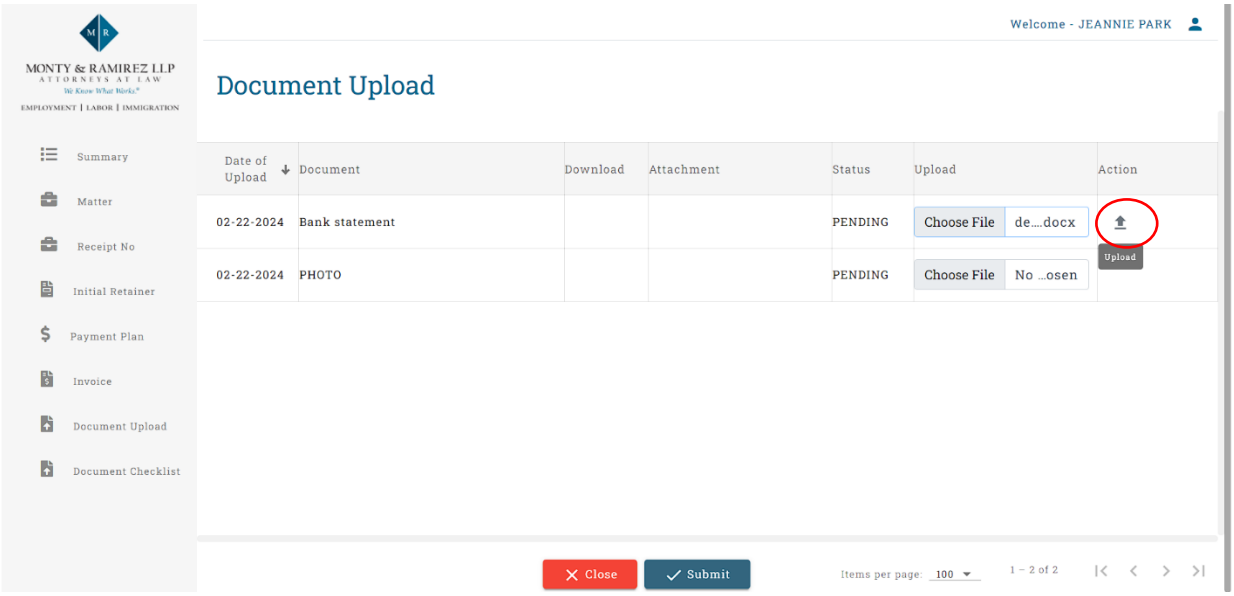
Initial API Call:

- https://mrclara.com:27070/mnrclara/api/services/mnr-management-service/mattergenacc/10135-02 [GET]
- https://mrclara.com:27070/mnrclara/api/services/mnr-management-service/matterdoclistheader/find [POST]

  Body:

```
{
   "checkListNo": [
      "9000082"
   ],
   "matterNumber": [
      "10135-02"
   ],
   "matterHeaderId": [
      "83"
   ]
}
```





Clicking on the **upload** icon, this will appear as shown in the figure.

On-upload API Call:

- https://mrclara.com:27070/mnrclara/api/services/doc-storage/upload [POST]
  Parameter:
  Location

- https://mrclara.com:27070/mnrclara/api/services/mnr-management-service/matterdoclistheader/new/84 [PATCH]
  Body:

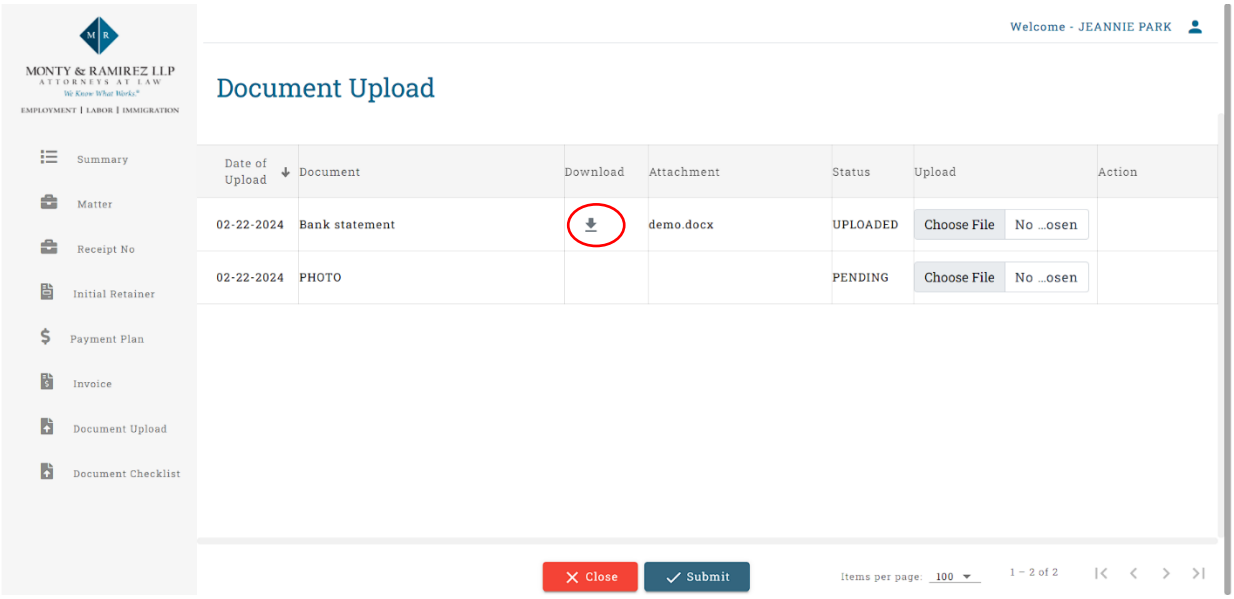
```
{
   "caseSubCategoryId": 252,
   "checkListNo": 9000082,
   "classId": 2,
   "clientId": "10135",
   "languageId": "EN",
   "matterNumber": "10135-02",
   "statusId": 60,
   "matterDocLists": [
      {
         "caseCategoryId": 18,
         "caseSubCategoryId": 252,
         "checkListNo": 9000082,
         "classId": 2,
         "clientId": "10135",
         "documentName": "Bank statement",
         "documentUrl": "demo.docx",
         "languageId": "EN",
         "matterNumber": "10135-02",
         "matterText": "",
         "sequenceNumber": 1,
         "statusId": 60
      }
   ]
}
```

- https://mrclara.com:27070/mnrclara/api/services/mnr-management-service/matterdoclistheader/find [POST]

  Body:

```
{
   "checkListNo": ["9000082"],
   "matterNumber": [10135-02"],
   "matterHeaderId": ["84"]
}
```

Before submit Download



Clicking on the **download** icon, this will appear as shown in the figure.

Initial API Call:

- https://mrclara.com:27070/mnrclara/api/services/mnr-management-service/matterdoclistheader/find [POST]

  Body:

  {

  "checkListNo": [

  "9000082"

  ]

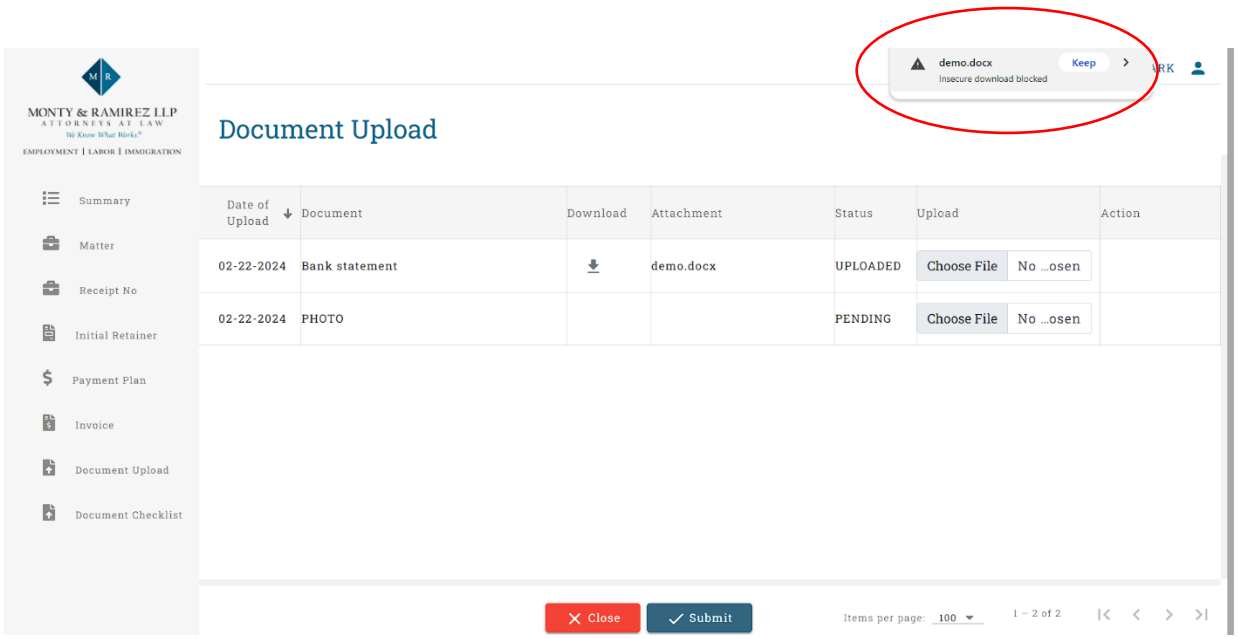
  }

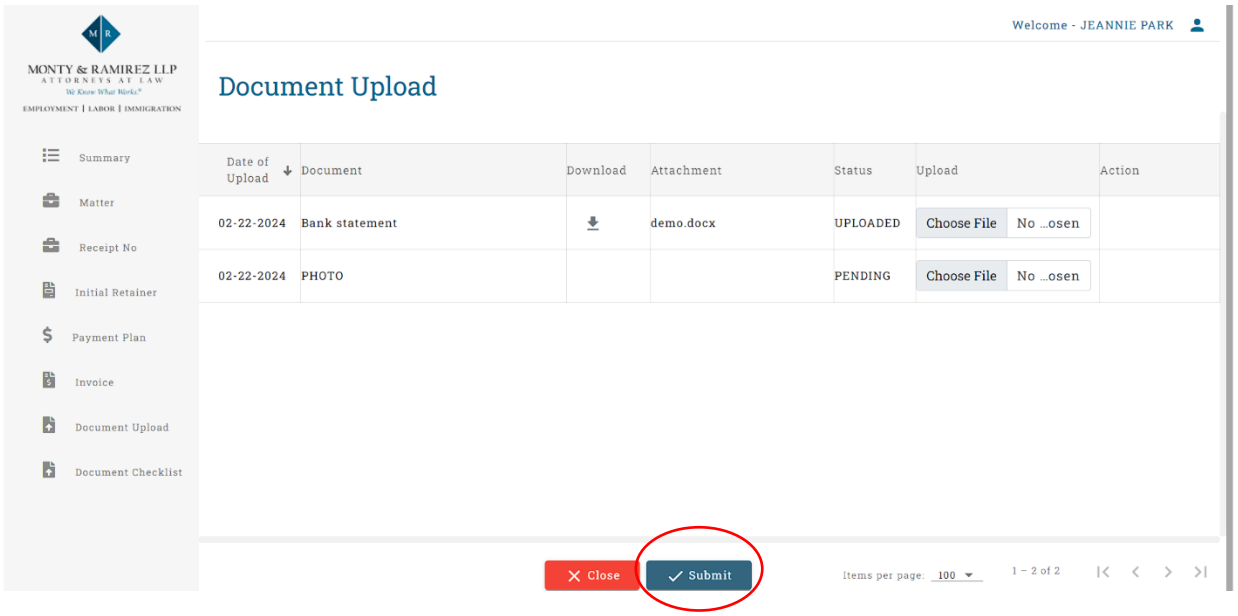
On-Download API Call:

- https://mrclara.com:27070/mnrclara/api/services/doc-storage/download [GET]

  Parameter:

  1. filename
  2. location





Clicking on the **Submit** button, this will appear as shown in the figure.

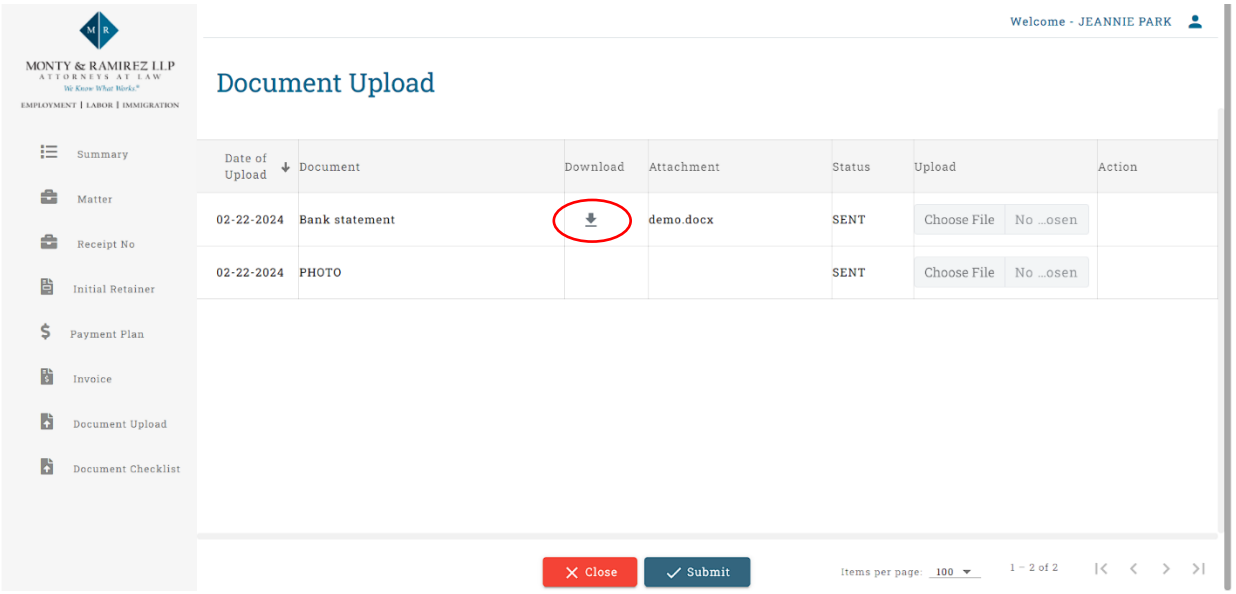
Initial API Call:

- https://mrclara.com:27070/mnrclara/api/services/mnr-management-service/matterdoclist/10135-02/clientPortal/docCheckList [GET]

  Parameters:

1. **checkListNo:**
2. **clientId:**
3. **matterHeaderId**

After Submit download



Clicking on the **Submit** button, this will appear as shown in the figure.

Initial API Call:

- https://mrclara.com:27070/mnrclara/api/services/mnr-management-service/matterdoclistheader/find [POST]

Body:

```
{
  "checkListNo": [
    "9000082"
  ]
}
```

On-download API Call:

- https://mrclara.com:27070/mnrclara/api/services/doc-storage/download [GET]

Parameters:

leName
location