
CLARA APPLICATION

TECHNICAL & FUNCTIONAL SPECIFICATION DOCUMENT

Dashboard Module

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1. CRM

Functional Specification

Lead Conversion

Selection Parameters

UI labels	Selection options	Table Fields	Options	Condition	Default
Period	Dropdown options(current month, current quarter, previous month, previous quarter,Current Year,Previous year)	CTD_ON	Single selection	Mandatory	Default period "CURRENT MONTH"

Logic

Input Parameters

1 Current Month

Identify Current Month

Pass Logged in CLASS_ID and From Date as Current Month's start date and To date as today's date in CTD_ON field in INQUIRY table

Fetch

Fetch INQ_NO and ASSIGNED_USR_ID

Group INQ_NO by ASSIGNED_USR_ID

Pass the Grouped INQ_NO in INQUIRY table and fetch CLIENT_ID values

Apply this formula

Send the formula result to UI grouping them by ASSIGNED_USR_ID

2 Current Quarter

Financial year is caluclated from January to December

Quarter	Period
1	Jan- Mar
2	Apr-Jun
3	July-Sep
4	Oct-Dec

Identify current month and Current Quarter from today's date

Pass From Date as Current quarter's start date and To date as today's date in CTD_ON field in INQUIRY table

Fetch

Fetch INQ_NO and ASSIGNED_USR_ID

Group INQ_NO by ASSIGNED_USR_ID

Pass the Grouped INQ_NO in INQUIRY table and fetch CLIENT_ID values

Apply this formula

Send the formula result to UI grouping them by ASSIGNED_USR_ID

3 Current Year

Identify Current Year

Pass From Date as Current year's start date and To date as today's date in CTD_ON field in INQUIRY table

Fetch

Fetch INQ_NO and ASSIGNED_USR_ID

Group INQ_NO by ASSIGNED_USR_ID

Pass the Grouped INQ_NO in INQUIRY table and fetch CLIENT_ID values

Apply this formula

Send the formula result to UI grouping them by ASSIGNED_USR_ID

4 Previous Month

Identify Current Month

Previous Month = Current Month - 1

Pass From Date as Previous Month's start date and To date as today's date in CTD_ON field in INQUIRY table

Fetch INQ_NO and ASSIGNED_USR_ID

Group INQ_NO by ASSIGNED_USR_ID

Pass the Grouped INQ_NO in INQUIRY table and fetch CLIENT_ID values

Apply this formula

Send the formula result to UI grouping them by ASSIGNED_USR_ID

5 Previous Quarter

Financial year is calculated from January to December

Quarter	Period
1	Jan- Mar
2	Apr-Jun
3	July-Sep
4	Oct-Dec

Identify current month and Current Quarter from today's date

Previous Quarter = Current quarter - 1

Pass From Date as Previous quarter's start date and To date as today's date in CTD_ON field in INQUIRY table

Fetch INQ_NO and ASSIGNED_USR_ID

Group INQ_NO by ASSIGNED_USR_ID

Pass the Grouped INQ_NO in INQUIRY table and fetch CLIENT_ID values

Apply this formula

Send the formula result to UI grouping them by ASSIGNED_USR_ID

6 Previous Year

Financial year is calculated from January to December

Identify current year from today's date

Previous year = Current year - 1

Pass From Date as Previous year's start date and To date as today's date in CTD_ON field in INQUIRY table

Fetch INQ_NO and ASSIGNED_USR_ID

Group INQ_NO by ASSIGNED_USR_ID

Pass the Grouped INQ_NO in INQUIRY table and fetch CLIENT_ID values

Apply this formula

Send the formula result to UI grouping them by ASSIGNED_USR_ID

Client Referral

Selection Parameters

UI labels	Selection options	Table Fields	Options	Condition	Default
Period	Dropdown options(current month, current quarter, previous month, previous quarter,Current Year,Previous year)	CTD_ON	Single selection	Mandatory	Default period "CURRENT MONTH"

Logic

Input Parameters

1 Current Month

Identify Current Month

Pass Logged in CLASS_ID and From Date as Current Month's start date and To date as today's date in CTD_ON field in CLIENTGENERAL table

Fetch

REFERRAL_ID , pass this REFERRALID in REFERRALID table and fetch REFERRAL_TEXT

Group by REFERRAL_TEXT values and fetch count of records, calculate average (Individual referral count/ Total count *100) and send both values to UI

Referral_text	Count	Avg
social	3	17.65
Client	4	23.53
Website	10	58.82
	17	

2 Current Quarter

Financial year is caluclated from January to December

Quarter	Period
1	Jan- Mar
2	Apr-Jun
3	July-Sep
4	Oct-Dec

3 Current Year

Identify Current Year

Pass From Date as Current year's start date and To date as today's date in CTD_ON field in CLIENTGENERAL table

Fetch

REFERRAL_ID , pass this REFERRALID in REFERRALID table and fetch REFERRAL_TEXT

Group by REFERRAL_TEXT values and fetch count of records, calculate average (Individual referral count/ Total count *100) and send both values to UI

4 Previous Month

Identify Current Month

Previous Month = Current Month - 1

Pass From Date as Previous Month's start date and To date as today's date in CTD_ON field in CLIENTGENERAL table

Fetch

REFERRAL_ID , pass this REFERRALID in REFERRALID table and fetch REFERRAL_TEXT

Group by REFERRAL_TEXT values and fetch count of records, calculate average (Individual referral count/ Total count *100) and send both values to UI

5 Previous Quarter

Financial year is calculated from January to December

Quarter	Period
1	Jan- Mar
2	Apr-Jun
3	July-Sep
4	Oct-Dec

Identify current month and Current Quarter from today's date

Previous Quarter = Current quarter - 1

Pass From Date as Previous quarter's start date and To date as today's date in CTD_ON field in CLIENTGENERAL table

Fetch

REFERRAL_ID , pass this REFERRALID in REFERRALID table and fetch REFERRAL_TEXT

Group by REFERRAL_TEXT values and fetch count of records, calculate average (Individual referral count/ Total count *100) and send both values to UI

6 Previous Year

Financial year is calculated from January to December

Identify current year from today's date

Previous year = Current year - 1

Pass From Date as Previous year's start date and To date as today's date in CTD_ON field in CLIENTGENERAL table

Fetch

REFERRAL_ID , pass this REFERRALID in REFERRALID table and fetch REFERRAL_TEXT

Group by REFERRAL_TEXT values and fetch count of records, calculate average (Individual referral count/ Total count *100) and send both values to UI

Case Assignment - Open Cases

Selection Parameters

UI labels	Selection options	Table Fields	Options	Condition	Default
Class	Dropdown options(1 and 2)	CLASS_ID	Single selection	Mandatory	Logged in user's CLASS_ID
Time keepers	Dropdown options(partners,originating,responsible time keepers, Legal Assistants)	PARTNER,ORIGINATING_TK,RESPONSIBLE_TK,LEGAL_ASSIST	Single selection	Mandatory	Default value "Responsible time keepers"

Logic

Input Parameters

1 Partners

Pass the selected CLASS_ID in MATTERASSIGNMENT table and fetch MATTER_NO and PARTNER values

Group by PARTNER values and fetch count of MATTER_NO , case category and Sub category where STATUS_ID=26 and send to UI

2 Originating Time keeper

Pass the selected CLASS_ID in MATTERASSIGNMENT table and fetch MATTER_NO and ORIGINATING_TK values

Group by ORIGINATING_TK values and fetch count of MATTER_NO , case category and Sub category where STATUS_ID=26 and send to UI

3 Responsible Time keeper

Pass the selected CLASS_ID in MATTERASSIGNMENT table and fetch MATTER_NO and RESPONSIBLE_TK values

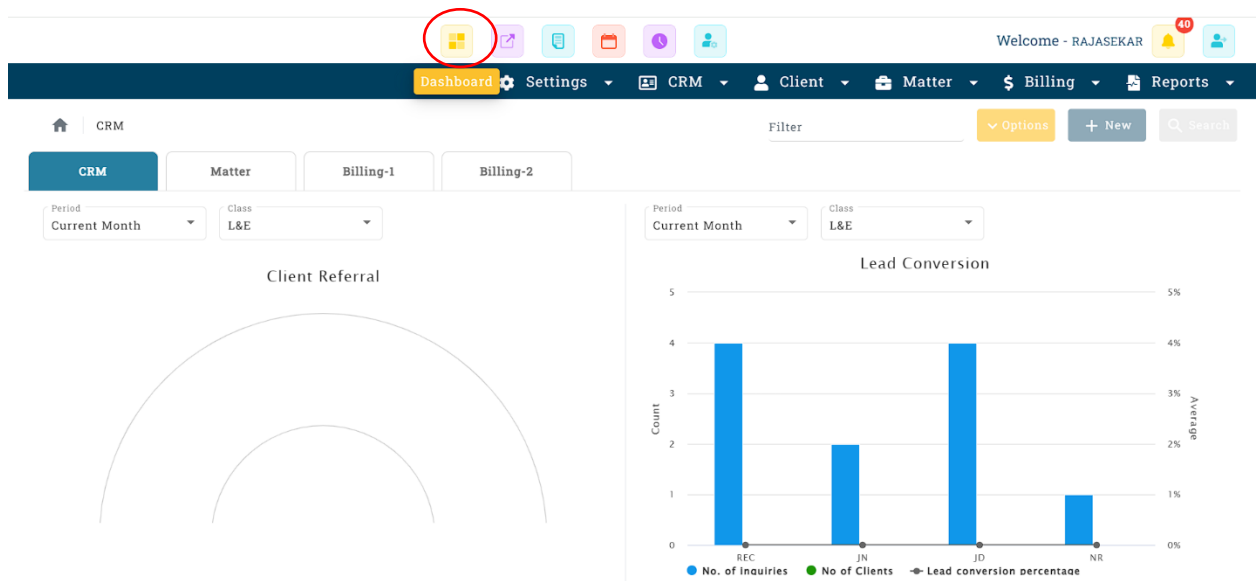
Group by RESPONSIBLE_TK values and fetch count of MATTER_NO , case category and Sub category where STATUS_ID=26 and send to UI

4 Legal Assistants

Pass the selected CLASS_ID in MATTERASSIGNMENT table and fetch MATTER_NO and LEGAL_ASSISTANT values

Group by LEGAL_ASSISTANT values and fetch count of MATTER_NO , case category and Sub category where STATUS_ID=26 and send to UI

Technical Specification



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

Initial API Call:

- <https://mrclara.com:27070/mnrclara/api/services/mnr-accounting-service/dashboard/clientReferral> [GET]

Parameters:

1. classId:
2. period

- <https://mrclara.com:27070/mnrclara/api/services/mnr-accounting-service/dashboard/leadConversion> [GET]

Parameters:

1. classId:
2. period

2. Matter

Functional Specification

Billable and Unbillable Time

Selection Parameters

UI labels	Selection options	Table Fields	Options	Condition	Default
Period	Dropdown options(current month, current quarter, previous month, previous quarter,Current Year,Previous year)	TICKET_DATE	Single selection	Mandatory	Default period "CURRENT MONTH"

Logic

Input Parameters

1 Current Month

Identify Current Month

Pass Logged in CLASS_ID and From Date as Current Month's start date and To date as today's date in TICKET_DATE field in MATTERTIMETICKET table

Fetch

BILL_TYPE and TIME_TICKET_HRS

Group by BILL_TYPE values and Sum TIME_TICKET_HRS and send to UI

2 Current Quarter

Financial year is calculated from January to December

Quarter	Period
1	Jan- Mar
2	Apr-Jun
3	July-Sep
4	Oct-Dec

Identify current month and Current Quarter from today's date

Pass From Date as Current quarter's start date and To date as today's date in TICKET_DATE field in MATTERTIMETICKET table

Fetch

BILL_TYPE and TIME_TICKET_HRS

Group by BILL_TYPE values and Sum TIME_TICKET_HRS and send to UI

3 Current Year

Identify Current Year

Pass From Date as Current year's start date and To date as today's date in TICKET_DATE field in MATTERTIMETICKET table

Fetch

BILL_TYPE and TIME_TICKET_HRS

Group by BILL_TYPE values and Sum TIME_TICKET_HRS and send to UI

4 Previous Month

Identify Current Month

Previous Month = Current Month - 1

Pass From Date as Previous Month's start date and To date as today's date in TICKET_DATE field in MATTERTIMETICKET table

Fetch

BILL_TYPE and TIME_TICKET_HRS

Group by BILL_TYPE values and Sum TIME_TICKET_HRS and send to UI

5 Previous Quarter

Financial year is caluclated from January to December

Quarter	Period
1	Jan- Mar
2	Apr-Jun
3	July-Sep
4	Oct-Dec

Identify current month and Current Quarter from today's date

Previous Quarter = Current quarter - 1

Pass From Date as Previous quarter's start date and To date as today's date in TICKET_DATE field in MATTERTIMETICKET table

Fetch

BILL_TYPE and TIME_TICKET_HRS

Group by BILL_TYPE values and Sum TIME_TICKET_HRS and send to UI

6 Previous Year

Financial year is calculated from January to December

Identify current year from today's date

Previous year = Current year - 1

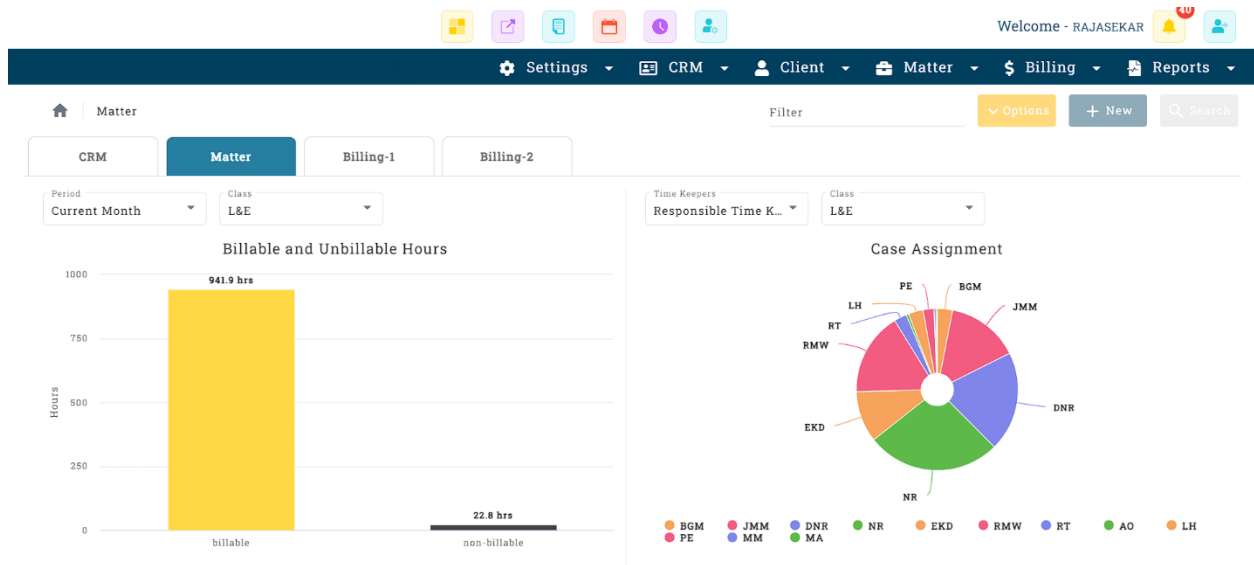
Pass From Date as Previous year's start date and To date as today's date in
TICKET_DATE field in MATTERTIMETICKET table

Fetch

BILL_TYPE and TIME_TICKET_HRS

Group by BILL_TYPE values and Sum TIME_TICKET_HRS and send to UI

Technical Specification



Initial API Call:

- <https://mrclara.com:27070/mnrclara/api/services/mnr-accounting-service/dashboard/billableUnbillableTime> [GET]

Parameters:

1. classId:
2. period

- <https://mrclara.com:27070/mnrclara/api/services/mnr-accounting-service/dashboard/caseAssignment> [GET]

Parameters:

1. classId:
2. timeKeepers

3. Billing-1

Functional Specification

Gross Billed income by partners

Selection Parameters

UI labels	Selection options	Table Fields	Options	Condition	Default
Class	Dropdown options(1 and 2)	CLASS_ID	Single selection	Mandatory	Logged in user's CLASS_ID
Period	Dropdown options(current month, current quarter, previous month, previous quarter,Current Year,Previous year)	POSTING_DATE	Single selection	Mandatory	Default period "CURRENT MONTH"

Logic

Input Parameters

1 Current Month

Identify Current Month

Pass selected CLASS_ID and From Date as Current Month's start date and To date as today's date in POSTING_DATE field in INVOICE HEADER table

Fetch

MATTER_NO and INVOICE_AMT

Pass the selected MATTER_NO field values from INVOICEHEADER in MATTERASSIGNMENT table and fetch PARTNER values

Group by PARTNER values and Sum INV_AMT and send to UI

2 Current Quarter

Financial year is calculated from January to December

Quarter	Period
1	Jan- Mar
2	Apr-Jun
3	July-Sep
4	Oct-Dec

Identify current month and Current Quarter from today's date

Pass Selected CLASS_ID and From Date as Current quarter's start date and To date as today's date in POSTING_DATE field in INVOICE HEADER table

Fetch

MATTER_NO and INVOICE_AMT

Pass the selected MATTER_NO field values from INVOICEHEADER in MATTERASSIGNMENT table and fetch PARTNER values

Group by PARTNER values and Sum INV_AMT and send to UI

3 Current Year

Identify Current Year

Pass Selected CLASS_ID and From Date as current year's start date and To date as today's date in POSTING_DATE field in INVOICE HEADER table

Fetch

MATTER_NO and INVOICE_AMT

Pass the selected MATTER_NO field values from INVOICEHEADER in MATTERASSIGNMENT table and fetch PARTNER values

Group by PARTNER values and Sum INV_AMT and send to UI

4 Previous Month

Identify Current Month

Previous Month = Current Month - 1

Pass Selected in CLASS_ID and Pass From Date as Previous Month's start date and To date as today's date in POSTING_DATE field in INVOICE HEADER table

Fetch

MATTER_NO and INVOICE_AMT

Pass the selected MATTER_NO field values from INVOICEHEADER in MATTERASSIGNMENT table and fetch PARTNER values

Group by PARTNER values and Sum INV_AMT and send to UI

5 Previous Quarter

Financial year is calculated from January to December

Quarter	Period
1	Jan- Mar
2	Apr-Jun
3	July-Sep
4	Oct-Dec

Identify current month and Current Quarter from today's date

Previous Quarter = Current quarter - 1

Pass selected CLASS_ID and From Date as Previous quarter's start date and To date as today's date in POSTING_DATE field in INVOICE HEADER table

Fetch

MATTER_NO and INVOICE_AMT

Pass the selected MATTER_NO field values from INVOICEHEADER in MATTERASSIGNMENT table and fetch PARTNER values

Group by PARTNER values and Sum INV_AMT and send to UI

6 Previous Year

Financial year is calculated from January to December

Identify current year from today's date

Previous year = Current year - 1

Pass Selected CLASS_ID and From Date as Previous year's start date and To date as today's date in POSTING_DATE field in INVOICE HEADER table

Fetch

MATTER_NO and INVOICE_AMT

Pass the selected MATTER_NO field values from INVOICEHEADER in MATTERASSIGNMENT table and fetch PARTNER values

Group by PARTNER values and Sum INV_AMT and send to UI

Practice Breakdown by case codes

Selection Parameters

UI labels	Selection options	Table Fields	Options	Condition	Default
Class	Dropdown options(1 and 2)	CLASS_ID	Single selection	Mandatory	Logged in user's CLASS_ID
Period	Dropdown options(current month, current quarter, previous month, previous quarter,Current Year,Previous year)	POSTING_DATE	Single selection	Mandatory	Default value "Responsible time keepers"

Logic

Input Parameters

1 Current Month

Identify Current Month

Pass selected CLASS_ID and From Date as Current Month's start date and To date as today's date in POSTING_DATE field in INVOICE HEADER table

Fetch

MATTER_NO and INVOICE_AMT

Pass the selected MATTER_NO field values from INVOICEHEADER in MATTERGENACC table and fetch CASE_CATEGORY values

Group by CASE_CATEGORY values and Sum INV_AMT and send to UI

2 Current Quarter

Financial year is calculated from January to December

Quarter	Period
1	Jan- Mar
2	Apr-Jun
3	July-Sep
4	Oct-Dec

Identify current month and Current Quarter from today's date

Pass Selected CLASS_ID and From Date as Current quarter's start date and To date as today's date in POSTING_DATE field in INVOICE HEADER table

Fetch

MATTER_NO and INVOICE_AMT

Pass the selected MATTER_NO field values from INVOICEHEADER in MATTERGENACC table and fetch CASE_CATEGORY values

Group by CASE_CATEGORY values and Sum INV_AMT and send to UI

3 Current Year

Identify Current Year

Pass Selected CLASS_ID and From Date as current year's start date and To date as today's date in POSTING_DATE field in INVOICE HEADER table

Fetch

MATTER_NO and INVOICE_AMT

Pass the selected MATTER_NO field values from INVOICEHEADER in MATTERGENACC table and fetch CASE_CATEGORY values

Group by CASE_CATEGORY values and Sum INV_AMT and send to UI

4 Previous Month

Identify Current Month

Previous Month = Current Month - 1

Pass Selected in CLASS_ID and Pass From Date as Previous Month's start date and To date as today's date in POSTING_DATE field in INVOICE HEADER table

Fetch

MATTER_NO and INVOICE_AMT

Pass the selected MATTER_NO field values from INVOICEHEADER in MATTERGENACC table and fetch CASE_CATEGORY values

Group by CASE_CATEGORY values and Sum INV_AMT and send to UI

5 Previous Quarter

Financial year is calculated from January to December

Quarter	Period
1	Jan- Mar
2	Apr-Jun
3	July-Sep
4	Oct-Dec

Identify current month and Current Quarter from today's date

Previous Quarter = Current quarter - 1

Pass selected CLASS_ID and From Date as Previous quarter's start date and To date as today's date in POSTING_DATE field in INVOICE HEADER table

Fetch

MATTER_NO and INVOICE_AMT

Pass the selected MATTER_NO field values from INVOICEHEADER in MATTERGENACC table and fetch CASE_CATEGORY values

Group by CASE_CATEGORY values and Sum INV_AMT and send to UI

6 Previous Year

Financial year is calculated from January to December

Identify current year from today's date

Previous year = Current year - 1

Pass Selected CLASS_ID and From Date as Previous year's start date and To date as today's date in POSTING_DATE field in INVOICE HEADER table

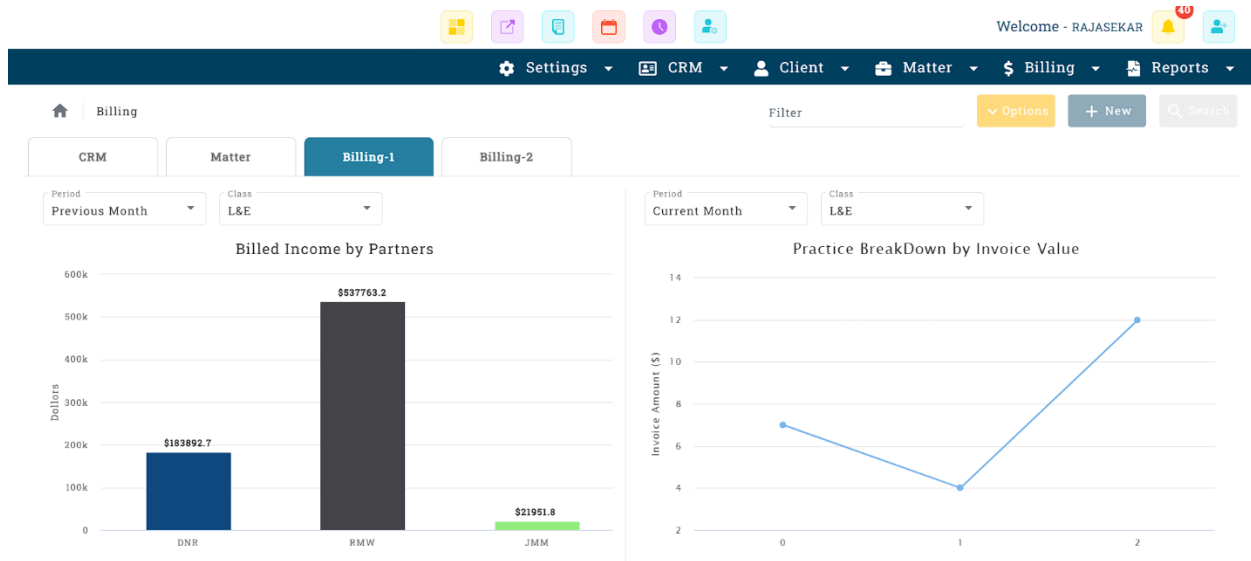
Fetch

MATTER_NO and INVOICE_AMT

Pass the selected MATTER_NO field values from INVOICEHEADER in MATTERGENACC table and fetch CASE_CATEGORY values

Group by CASE_CATEGORY values and Sum INV_AMT and send to UI

Technical Specification



Initial API Call:

- <https://mrclara.com:27070/mnrclara/api/services/mnr-accounting-service/dashboard/billedIncome> [GET]

Parameters:

1. classId:
 2. period
- <https://mrclara.com:27070/mnrclara/api/services/mnr-accounting-service/dashboard/practiceBreakDown> [GET]

Parameters:

1. classId:
2. period

4. Billing-2

Functional Specification

Top 10 Clients by Billable hours in a month

Selection Parameters

UI labels	Selection options	Table Fields	Options	Condition
Period	Default period "CURRENT MONTH"	CTD_ON	Single selection	Mandatory

Logic

Input Parameters

1 Current Month

Identify Current Month

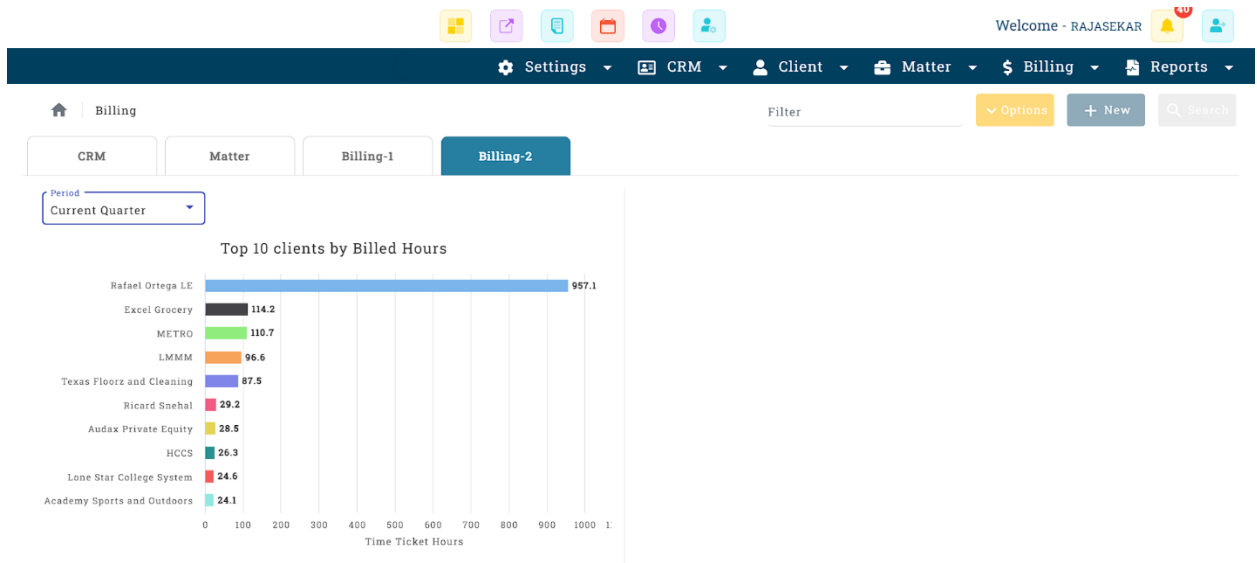
Pass From Date as Current Month's start date and To date as today's date in CTD_ON field in MATTERTIMETICKET table

Fetch

CLIENT_ID, BILL_TYPE=BILLABLE and TIME_TICKET_HRS field values

Group by CLIENT_ID values and Sum TIME_TICKET_HRS and send to UI

Technical Specification



Initial API Call:

- <https://mrclara.com:27070/mnrclara/api/services/mnr-accounting-service/dashboard/topClients> [GET]

Parameters:

1. period