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# **Clara Application**

## **Technical & Functional Specification Documentation**

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### ***Client Portal Module***

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# 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



The screenshot displays a login interface for Monty & Ramirez LLP. On the left, a large light gray box contains the firm's logo and name: "MONTY & RAMIREZ LLP ATTORNEYS AT LAW We Know What Works.® EMPLOYMENT | LABOR | IMMIGRATION". To the right, there are two radio buttons: "Mobile OTP" (unselected) and "Email OTP" (selected). Below these is a text input field with a red circle around a blue arrow icon on its right side. Under the input field, the text "ENTER EMAIL TO GET ONE TIME PASSWORD (OTP)" is displayed. Below this text are four empty square boxes for entering the OTP. At the bottom right is a blue "LOGIN" button.

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"
  ]
}
```



☒ Mobile OTP ☐ Email OTP

ENTER NUMBER TO GET ONE TIME  
PASSWORD (OTP)

LOGIN

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.

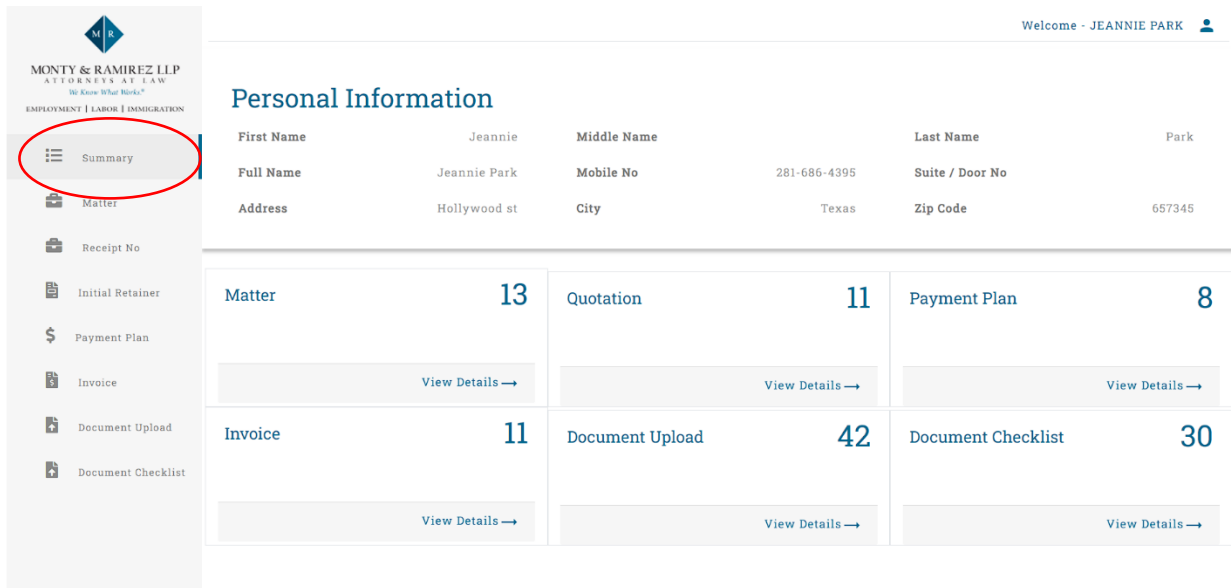
Display the screens when the value is TRUE for the above fields

#### 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



The screenshot shows the client portal interface. On the left is a sidebar with a menu where the 'Summary' option is highlighted with a red circle. The main content area is titled 'Personal Information' and displays client details for Jeannie Park. Below this is a summary table of various documents and their counts.

Field	Value	Field	Value	Field	Value
First Name	Jeannie	Middle Name		Last Name	Park
Full Name	Jeannie Park	Mobile No	281-686-4395	Suite / Door No	
Address	Hollywood st	City	Texas	Zip Code	657345

Matter	13	Quotation	11	Payment Plan	8
<a href="#">View Details →</a>		<a href="#">View Details →</a>		<a href="#">View Details →</a>	
Invoice	11	Document Upload	42	Document Checklist	30
<a href="#">View Details →</a>		<a href="#">View Details →</a>		<a href="#">View Details →</a>	

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:

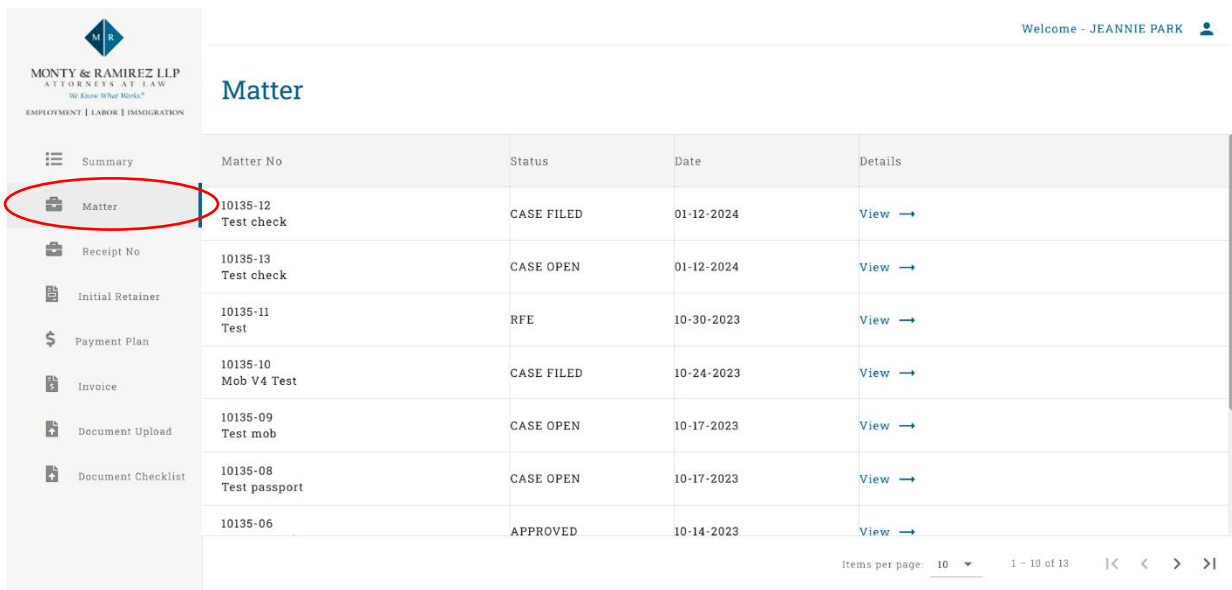
```
{
  "clientId": [
    "10135"
  ]
}
```

### 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 USER_ID in USERPROIFLE table and fetch EMAIL_D value and fill
Status	STATUS_ID/STATUS_TEXT	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



Matter				
Matter No	Status	Date	Details	
10135-12 Test check	CASE FILED	01-12-2024	View →	
10135-13 Test check	CASE OPEN	01-12-2024	View →	
10135-11 Test	RFE	10-30-2023	View →	
10135-10 Mob V4 Test	CASE FILED	10-24-2023	View →	
10135-09 Test mob	CASE OPEN	10-17-2023	View →	
10135-08 Test passport	CASE OPEN	10-17-2023	View →	
10135-06	APPROVED	10-14-2023	View →	

Items per page: 10 1 - 10 of 13 |< < > >|

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"
  ]
}
```

Welcome - JEANNIE PARK

**Matter**

	Matter No	Status	Date	Details
Matter	10135-12 Test check	CASE FILED	01-12-2024	<b>View →</b>
Receipt No	10135-13 Test check	CASE OPEN	01-12-2024	View →
Initial Retainer	10135-11 Test	RFE	10-30-2023	View →
Payment Plan	10135-10 Mob V4 Test	CASE FILED	10-24-2023	View →
Invoice	10135-09 Test mob	CASE OPEN	10-17-2023	View →
Document Upload	10135-08 Test passport	CASE OPEN	10-17-2023	View →
Document Checklist	10135-06	APPROVED	10-14-2023	View →

Items per page: 10 1 - 10 of 13 < > >>

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]

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**Matter**

	Matter No	Status	Date	Details
Matter	10135-12 Test check	CASE FILED	01-12-2024	<b>View →</b>
Receipt No	10135-13 Test check	CASE OPEN	01-12-2024	View →
Initial Retainer	10135-11 Test	RFE	10-30-2023	View →
Payment Plan	10135-10 Mob V4 Test	CASE FILED	10-24-2023	View →
Invoice	10135-09 Test mob	CASE OPEN	10-17-2023	View →
Document Upload	10135-08 Test passport	CASE OPEN	10-17-2023	View →
Document Checklist	10135-06	APPROVED	10-14-2023	View →

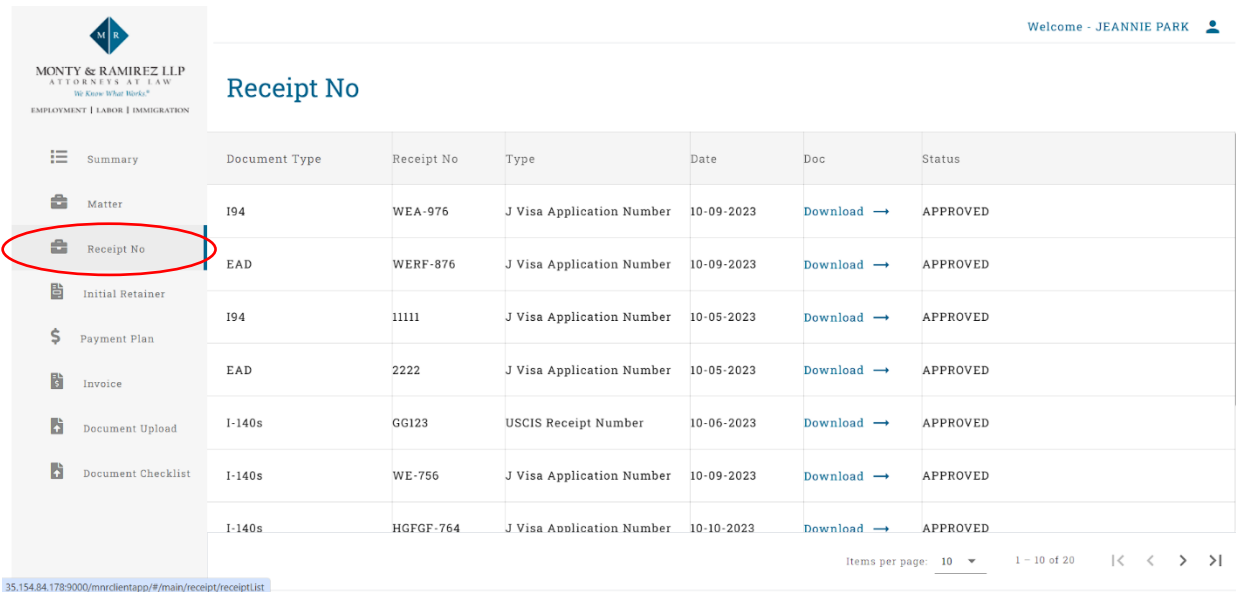
Items per page: 10 1 - 10 of 13 < > >>

**Matter - 10135-12**

1 Opened On

01-12-2024

## 4. Receipt No



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### Receipt No

Document Type	Receipt No	Type	Date	Doc	Status
I94	WEA-976	J Visa Application Number	10-09-2023	<a href="#">Download</a> →	APPROVED
EAD	WERF-876	J Visa Application Number	10-09-2023	<a href="#">Download</a> →	APPROVED
I94	11111	J Visa Application Number	10-05-2023	<a href="#">Download</a> →	APPROVED
EAD	2222	J Visa Application Number	10-05-2023	<a href="#">Download</a> →	APPROVED
I-140s	GG123	USCIS Receipt Number	10-06-2023	<a href="#">Download</a> →	APPROVED
I-140s	WE-756	J Visa Application Number	10-09-2023	<a href="#">Download</a> →	APPROVED
I-140s	HGFGF-764	J Visa Application Number	10-10-2023	<a href="#">Download</a> →	APPROVED

Items per page: 10 1 - 10 of 20 < > >>


35.154.84.178:9000/mnrclientapp/#/main/receipt/receiptList


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


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### Receipt No

	Document Type	Receipt No	Type	Date	Doc	Status
Summary						
Matter	194	WEA-976	J Visa Application Number	10-09-2023	<a href="#">Download</a> →	APPROVED
Receipt No	EAD	WERF-876	J Visa Application Number	10-09-2023	<a href="#">Download</a> →	APPROVED
Initial Retainer	194	11111	J Visa Application Number	10-05-2023	<a href="#">Download</a> →	APPROVED
Payment Plan	EAD	2222	J Visa Application Number	10-05-2023	<a href="#">Download</a> →	APPROVED
Invoice						
Document Upload	I-140s	GG123	USCIS Receipt Number	10-06-2023	<a href="#">Download</a> →	APPROVED
Document Checklist	I-140s	WE-756	J Visa Application Number	10-09-2023	<a href="#">Download</a> →	APPROVED
	I-140s	HGFGF-764	J Visa Application Number	10-10-2023	<a href="#">Download</a> →	APPROVED

Items per page: 10 1 - 10 of 20 < > >|


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:


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 Doct (1).pdf  
 Insecure download blocked [Keep](#) >

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### Receipt No

	Document Type	Receipt No	Type	Date	Doc	Status
Summary						
Matter	194	WEA-976	J Visa Application Number	10-09-2023	<a href="#">Download</a> →	APPROVED
Receipt No	EAD	WERF-876	J Visa Application Number	10-09-2023	<a href="#">Download</a> →	APPROVED
Initial Retainer	194	11111	J Visa Application Number	10-05-2023	<a href="#">Download</a> →	APPROVED
Payment Plan	EAD	2222	J Visa Application Number	10-05-2023	<a href="#">Download</a> →	APPROVED
Invoice						
Document Upload	I-140s	GG123	USCIS Receipt Number	10-06-2023	<a href="#">Download</a> →	APPROVED
Document Checklist	I-140s	WE-756	J Visa Application Number	10-09-2023	<a href="#">Download</a> →	APPROVED
	I-140s	HGFGF-764	J Visa Application Number	10-10-2023	<a href="#">Download</a> →	APPROVED

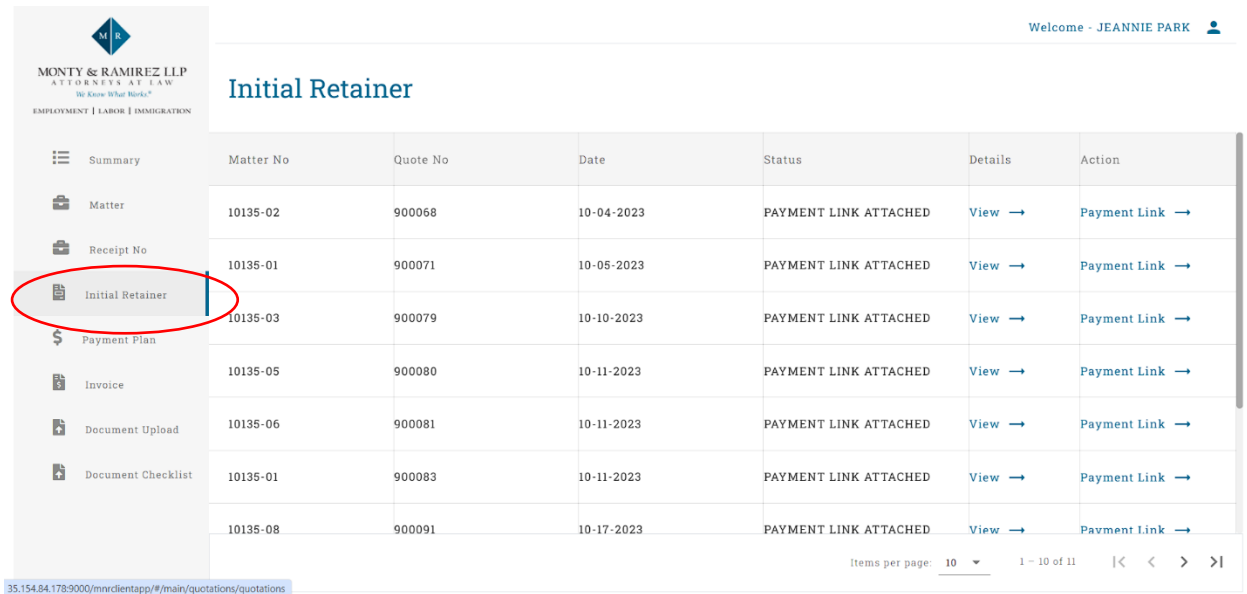
Items per page: 10 1 - 10 of 20 < > >|

## 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



Initial Retainer						
	Matter No	Quote No	Date	Status	Details	Action
Matter	10135-02	900068	10-04-2023	PAYMENT LINK ATTACHED	View →	Payment Link →
Receipt No	10135-01	900071	10-05-2023	PAYMENT LINK ATTACHED	View →	Payment Link →
Initial Retainer	10135-03	900079	10-10-2023	PAYMENT LINK ATTACHED	View →	Payment Link →
Payment Plan	10135-05	900080	10-11-2023	PAYMENT LINK ATTACHED	View →	Payment Link →
Invoice	10135-06	900081	10-11-2023	PAYMENT LINK ATTACHED	View →	Payment Link →
Document Upload	10135-01	900083	10-11-2023	PAYMENT LINK ATTACHED	View →	Payment Link →
Document Checklist	10135-08	900091	10-17-2023	PAYMENT LINK ATTACHED	View →	Payment Link →

Items per page: 10 1 - 10 of 11 |< < > >|

35.154.84.178:9000/mnrclaraapp/#/main/quotations/quotations

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



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### Initial Retainer

	Matter No	Quote No	Date	Status	Details	Action
Summary	10135-02	900068	10-04-2023	PAYMENT LINK ATTACHED	<a href="#">View →</a>	<a href="#">Payment Link →</a>
Matter	10135-01	900071	10-05-2023	PAYMENT LINK ATTACHED	<a href="#">View →</a>	<a href="#">Payment Link →</a>
Receipt No	10135-03	900079	10-10-2023	PAYMENT LINK ATTACHED	<a href="#">View →</a>	<a href="#">Payment Link →</a>
Initial Retainer	10135-05	900080	10-11-2023	PAYMENT LINK ATTACHED	<a href="#">View →</a>	<a href="#">Payment Link →</a>
Payment Plan	10135-06	900081	10-11-2023	PAYMENT LINK ATTACHED	<a href="#">View →</a>	<a href="#">Payment Link →</a>
Invoice	10135-01	900083	10-11-2023	PAYMENT LINK ATTACHED	<a href="#">View →</a>	<a href="#">Payment Link →</a>
Document Upload	10135-08	900091	10-17-2023	PAYMENT LINK ATTACHED	<a href="#">View →</a>	<a href="#">Payment Link →</a>
Document Checklist						

Items per page: 10 1 - 10 of 11 < > >|


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



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### Invoice

Monty & Ramirez LLP 150 W.  
Parker Rd Ste 300 Houston, TX  
77076

Date	Invoice No
10-04-2023	900068

**Name / Address**

Jeannie Park  
Hollywood st


Terms	Due Date
Test	10-27-2023

Item	Description	Time Keeper	Date	Hours	Rate / Hour	Total
1	Feel		10-27-2023	45	\$ 23	\$ 1035
<b>Total</b>						\$ 1035


**Phone Number**

281-686-4395

## Payment Link



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**Initial Retainer**

	Matter No	Quote No	Date	Status	Details	Action
Summary						
Matter	10135-02	900068	10-04-2023	PAYMENT LINK ATTACHED	<a href="#">View →</a>	<a href="#">Payment Link →</a>
Receipt No	10135-01	900071	10-05-2023	PAYMENT LINK ATTACHED	<a href="#">View →</a>	<a href="#">Payment Link →</a>
Initial Retainer	10135-03	900079	10-10-2023	PAYMENT LINK ATTACHED	<a href="#">View →</a>	<a href="#">Payment Link →</a>
Payment Plan	10135-05	900080	10-11-2023	PAYMENT LINK ATTACHED	<a href="#">View →</a>	<a href="#">Payment Link →</a>
Invoice	10135-06	900081	10-11-2023	PAYMENT LINK ATTACHED	<a href="#">View →</a>	<a href="#">Payment Link →</a>
Document Upload	10135-01	900083	10-11-2023	PAYMENT LINK ATTACHED	<a href="#">View →</a>	<a href="#">Payment Link →</a>
Document Checklist	10135-08	900091	10-17-2023	PAYMENT LINK ATTACHED	<a href="#">View →</a>	<a href="#">Payment Link →</a>

Items per page: 10 1 - 10 of 11 < > >|

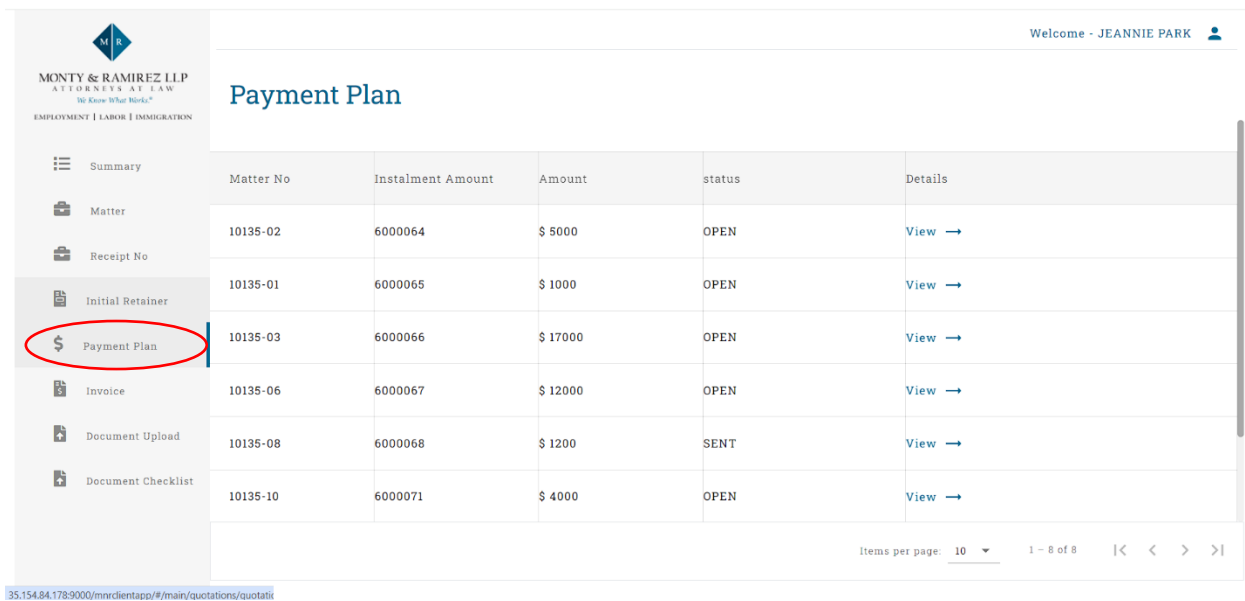
Clicking on the **payment link** option will route to payment window

## 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_DATE	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
Payment 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




35:154.84.178:9000/mnrclientapp/#/main/quotations/quotatio

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



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### Payment Plan

	Matter No	Instalment Amount	Amount	status	Details
	10135-02	6000064	\$ 5000	OPEN	<a href="#">View →</a>
	10135-01	6000065	\$ 1000	OPEN	<a href="#">View →</a>
	10135-03	6000066	\$ 17000	OPEN	<a href="#">View →</a>
	10135-06	6000067	\$ 12000	OPEN	<a href="#">View →</a>
	10135-08	6000068	\$ 1200	SENT	<a href="#">View →</a>
	10135-10	6000071	\$ 4000	OPEN	<a href="#">View →</a>

Items per page: 10 1 - 8 of 8 < > >|


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



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### Payment Plan Details

<b>Matter No</b>	10135-02	<b>Payment Plan No</b>	6000064	<b>Payment Plan Amount</b>	\$ 5000
<b>No Of Installments</b>	50	<b>Installment Amount</b>	\$ 100		

Lines +

Close

Items per page: 100 1 - 50 of 50 < > >|



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- Summary
- Matter
- Receipt No
- Initial Retainer
- Payment Plan
- Invoice
- Document Upload
- Document Checklist


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## Payment Plan Details

### Lines

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

 Close

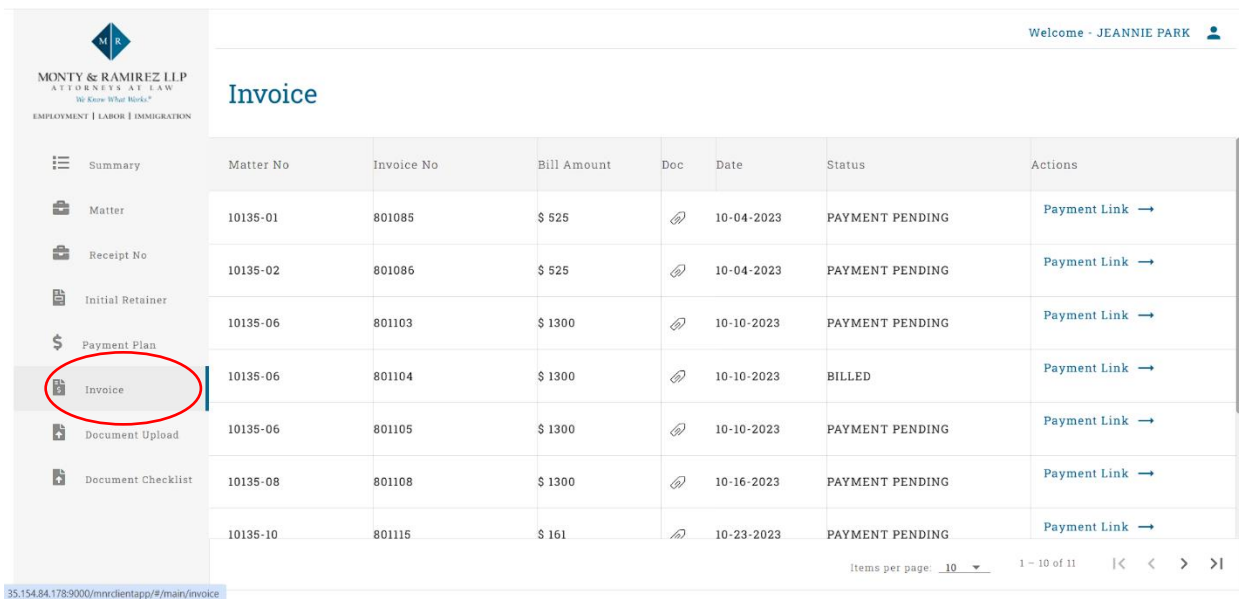
Items per page: 100 1 - 50 of 50    

## 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



Matter No	Invoice No	Bill Amount	Doc	Date	Status	Actions
10135-01	801085	\$ 525		10-04-2023	PAYMENT PENDING	Payment Link →
10135-02	801086	\$ 525		10-04-2023	PAYMENT PENDING	Payment Link →
10135-06	801103	\$ 1300		10-10-2023	PAYMENT PENDING	Payment Link →
10135-06	801104	\$ 1300		10-10-2023	BILLED	Payment Link →
10135-06	801105	\$ 1300		10-10-2023	PAYMENT PENDING	Payment Link →
10135-08	801108	\$ 1300		10-16-2023	PAYMENT PENDING	Payment Link →
10135-10	801115	\$ 161		10-23-2023	PAYMENT PENDING	Payment Link →

Items per page: 10 1 - 10 of 11 < > >|

35.154.84.178:9000/mnrclientapp/#/main/invoice

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



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### Invoice

	Matter No	Invoice No	Bill Amount	Doc	Date	Status	Actions
Summary	10135-01	801085	\$ 525		10-04-2023	PAYMENT PENDING	Payment Link →
Matter	10135-02	801086	\$ 525		10-04-2023	PAYMENT PENDING	Payment Link →
Receipt No	10135-06	801103	\$ 1300		10-10-2023	PAYMENT PENDING	Payment Link →
Initial Retainer	10135-06	801104	\$ 1300		10-10-2023	BILLED	Payment Link →
Payment Plan	10135-06	801105	\$ 1300		10-10-2023	PAYMENT PENDING	Payment Link →
Invoice	10135-08	801108	\$ 1300		10-16-2023	PAYMENT PENDING	Payment Link →
Document Upload	10135-10	801115	\$ 161		10-23-2023	PAYMENT PENDING	Payment Link →
Document Checklist							

Items per page: 10 1 - 10 of 11 < > >|

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



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### Invoice

	Matter No	Invoice No	Bill Amount	Doc	Date	Status	Actions
Summary							
Matter	10135-01	801085	\$ 525		10-04-2023	PAYMENT PENDING	<a href="#">Payment Link →</a>
Receipt No	10135-02	801086	\$ 525		10-04-2023	PAYMENT PENDING	<a href="#">Payment Link →</a>
Initial Retainer	10135-06	801103	\$ 1300		10-10-2023	PAYMENT PENDING	<a href="#">Payment Link →</a>
Payment Plan	10135-06	801104	\$ 1300		10-10-2023	BILLED	<a href="#">Payment Link →</a>
Invoice	10135-06	801105	\$ 1300		10-10-2023	PAYMENT PENDING	<a href="#">Payment Link →</a>
Document Upload	10135-08	801108	\$ 1300		10-16-2023	PAYMENT PENDING	<a href="#">Payment Link →</a>
Document Checklist	10135-10	801115	\$ 161		10-23-2023	PAYMENT PENDING	<a href="#">Payment Link →</a>

Items per page: 10 1 - 10 of 11 < > |

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

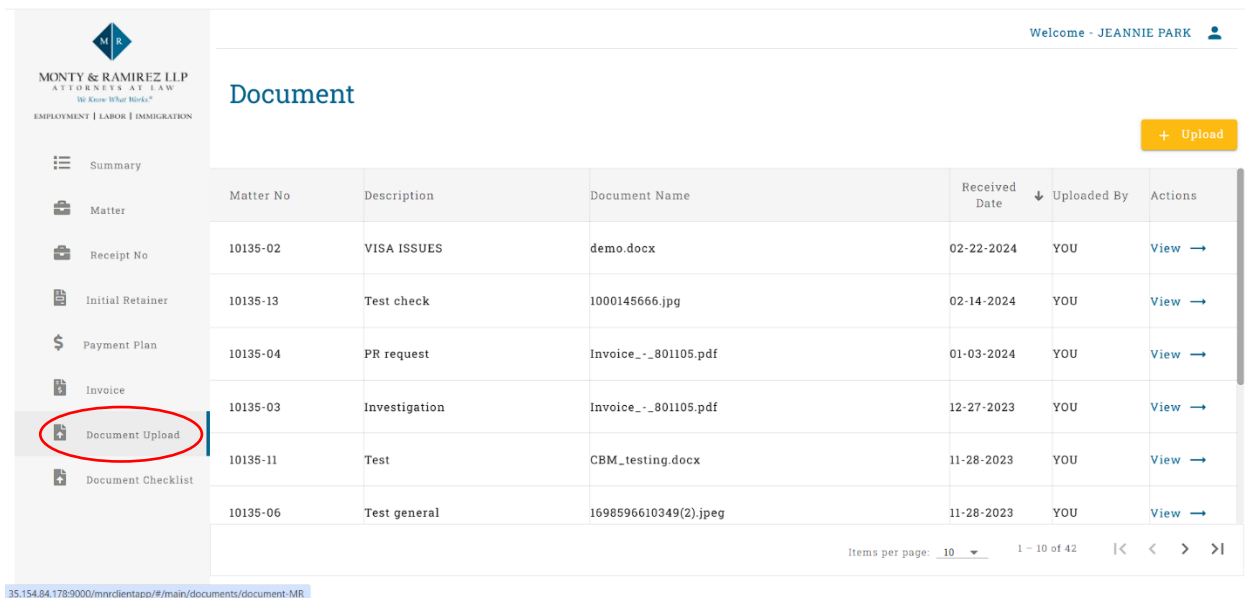
On Clicking Upload button, insert a record MATTERDOCUMENT table as below

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



Document

Summary

Matter

Receipt No

Initial Retainer

Payment Plan

Invoice

Document Upload

Document Checklist

Matter No	Description	Document Name	Received Date	Uploaded By	Actions
10135-02	VISA ISSUES	demo.docx	02-22-2024	YOU	View →
10135-13	Test check	1000145666.jpg	02-14-2024	YOU	View →
10135-04	PR request	Invoice_-_801105.pdf	01-03-2024	YOU	View →
10135-03	Investigation	Invoice_-_801105.pdf	12-27-2023	YOU	View →
10135-11	Test	CBM_testing.docx	11-28-2023	YOU	View →
10135-06	Test general	1698596610349(2).jpeg	11-28-2023	YOU	View →

Items per page: 10 1 - 10 of 42


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"
  ]
}
```



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- Summary
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- Document Upload**
- Document Checklist

## Document



Matter No	Description	Document Name	Received Date	Uploaded By	Actions
10135-02	VISA ISSUES	demo.docx	02-22-2024	YOU	View →
10135-13	Test check	1000145666.jpg	02-14-2024	YOU	View →
10135-04	PR request	Invoice_-_801105.pdf	01-03-2024	YOU	View →
10135-03	Investigation	Invoice_-_801105.pdf	12-27-2023	YOU	View →
10135-11	Test	CBM_testing.docx	11-28-2023	YOU	View →
10135-06	Test general	1698596610349(2).jpeg	11-28-2023	YOU	View →

Items per page: 10 1 - 10 of 42

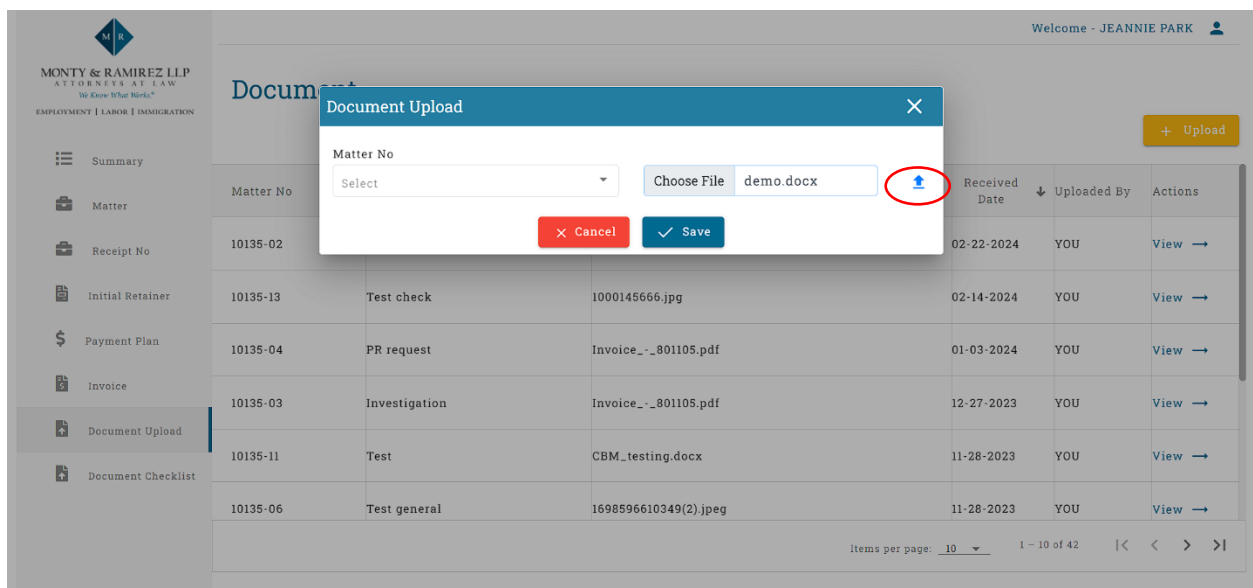
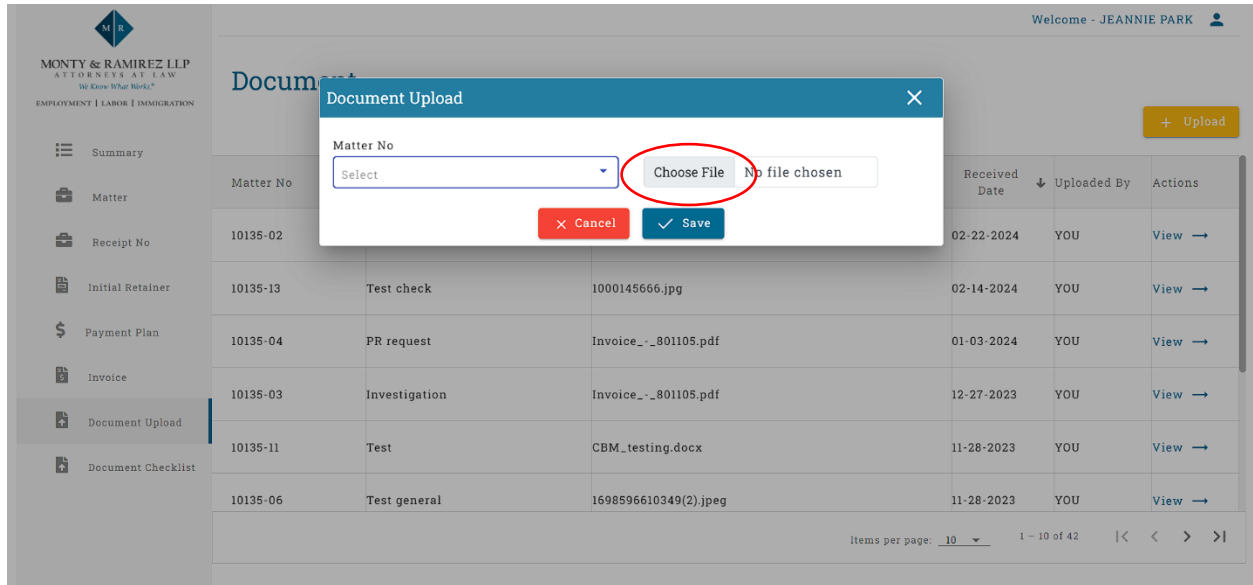
Clicking on the **upload** option, this will appear as shown in the figure.

### 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



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- Summary
- Matter
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- Document Upload
- Document Checklist

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### Document

+ Upload

Matter No	Description	Document Name	Received Date	Uploaded By	Actions
10135-01	VISA ISSUES	N4100.pdf	10-04-2023	YOU	<a href="#">View</a> →
10135-02	VISA ISSUES	ENG.pdf	10-04-2023	YOU	<a href="#">View</a> →
10135-03	Investigation	D006_D007-MEMO_TO_EMPLOYEE_ENCLOSING_Final_0-1_APPROVAL_processed_05122022_200739_(1).docx	10-12-2023	YOU	<a href="#">View</a> →
10135-02	VISA ISSUES	Invoice_No_-_900085.pdf	10-16-2023	YOU	<a href="#">View</a> →
10135-05	Test Visa	Invoice_No_-_900087.pdf	10-16-2023	YOU	<a href="#">View</a> →
10135-01	VISA ISSUES	Screenshot_2023-10-16-13-00-07-787_com.clara.clientnortal.ing	10-17-2023	YOU	<a href="#">View</a> →

Items per page: 10 1 - 10 of 42

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

- fileName
- location
- classId



Document Number - 10000066

-  Summary
-  Matter
-  Receipt No
-  Initial Retainer
-  Payment Plan
-  Invoice
-  Document Upload
-  Document Checklist

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@tekcllover.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

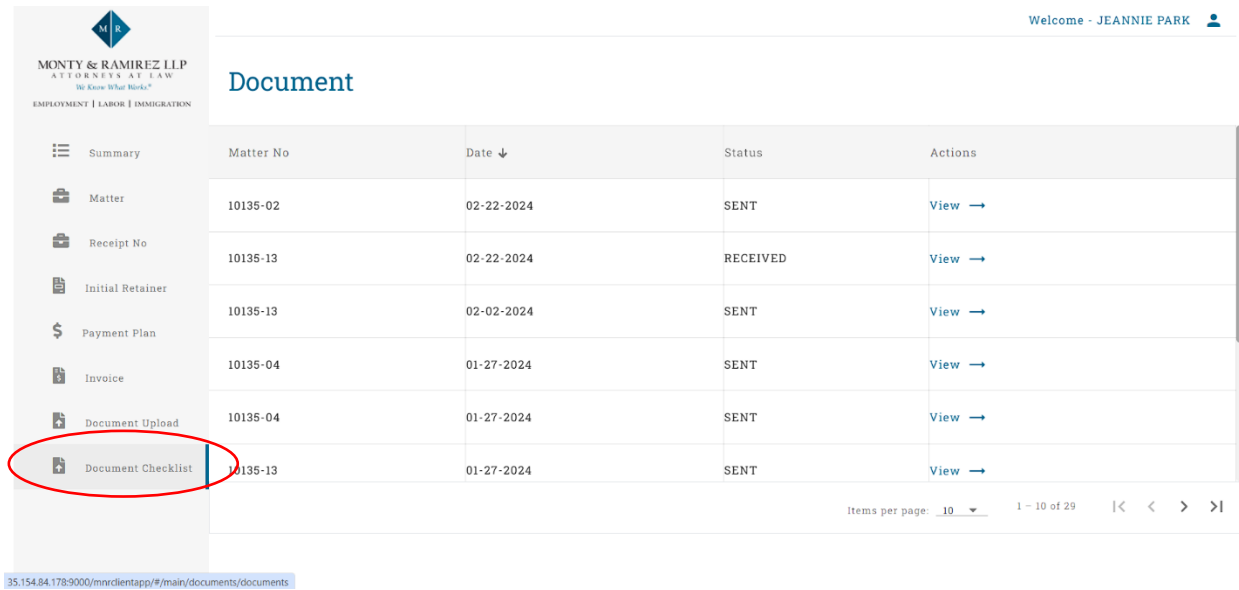
#### List Page

UI Label	Field Name	Logic
Matter	MATTER_NO	Pass CLIENT_ID in MATTERDOCCKECLISTHEADER 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 MATTERDOCCKECLISTHEADER table and fetch CHK_LIST_NO. Pass CHK_LIST_NO and fetch SEQ_NO and DOC_NAME
Upload file	RECEIVED_DOC_URL	<p>1. On Clicking this icon, open a file location in local drive to upload the documents, Note:All the file types to be supported.</p> <p>2. Once the file is uploaded, save the document in a temporary folder (Folder Name will be MATTER_NO&amp;CHK_LIST_NO.</p> <p>3. If a document is deleted before the final Submission, delete the document from Staging folder</p> <p>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</p>

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



Document

Matter No	Date ↓	Status	Actions
10135-02	02-22-2024	SENT	<a href="#">View →</a>
10135-13	02-22-2024	RECEIVED	<a href="#">View →</a>
10135-13	02-02-2024	SENT	<a href="#">View →</a>
10135-04	01-27-2024	SENT	<a href="#">View →</a>
10135-04	01-27-2024	SENT	<a href="#">View →</a>
10135-13	01-27-2024	SENT	<a href="#">View →</a>

Items per page: 10 1 - 10 of 29 < > >|

35.154.84.178:9000/mnrclientapp/#/main/documents/documents

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



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### Document

	Matter No	Date ↓	Status	Actions
Summary	10135-02	02-22-2024	SENT	<a href="#">View →</a>
Matter	10135-13	02-22-2024	RECEIVED	<a href="#">View →</a>
Receipt No	10135-13	02-02-2024	SENT	<a href="#">View →</a>
Initial Retainer	10135-04	01-27-2024	SENT	<a href="#">View →</a>
Payment Plan	10135-04	01-27-2024	SENT	<a href="#">View →</a>
Invoice	10135-13	01-27-2024	SENT	<a href="#">View →</a>
Document Upload	10135-13	01-27-2024	SENT	<a href="#">View →</a>
Document Checklist				

Items per page: 10 1 - 10 of 29 < > >|


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"
  ]
}
```



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- Summary
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- Document Checklist


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## Document Upload

Date of Upload	Document	Download	Attachment	Status	Upload	Action
02-22-2024	Bank statement			PENDING	Choose File No file chosen	
02-22-2024	PHOTO			PENDING	Choose File No file chosen	

Close
Submit

Items per page: 100 1 - 2 of 2





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- Summary
- Matter
- Receipt No
- Initial Retainer
- Payment Plan
- Invoice
- Document Upload
- Document Checklist

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## Document Upload

Date of Upload	Document	Download	Attachment	Status	Upload	Action
02-22-2024	Bank statement			PENDING	Choose File de...docx	
02-22-2024	PHOTO			PENDING	Choose File No file chosen	

Close
Submit

Items per page: 100 1 - 2 of 2

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:

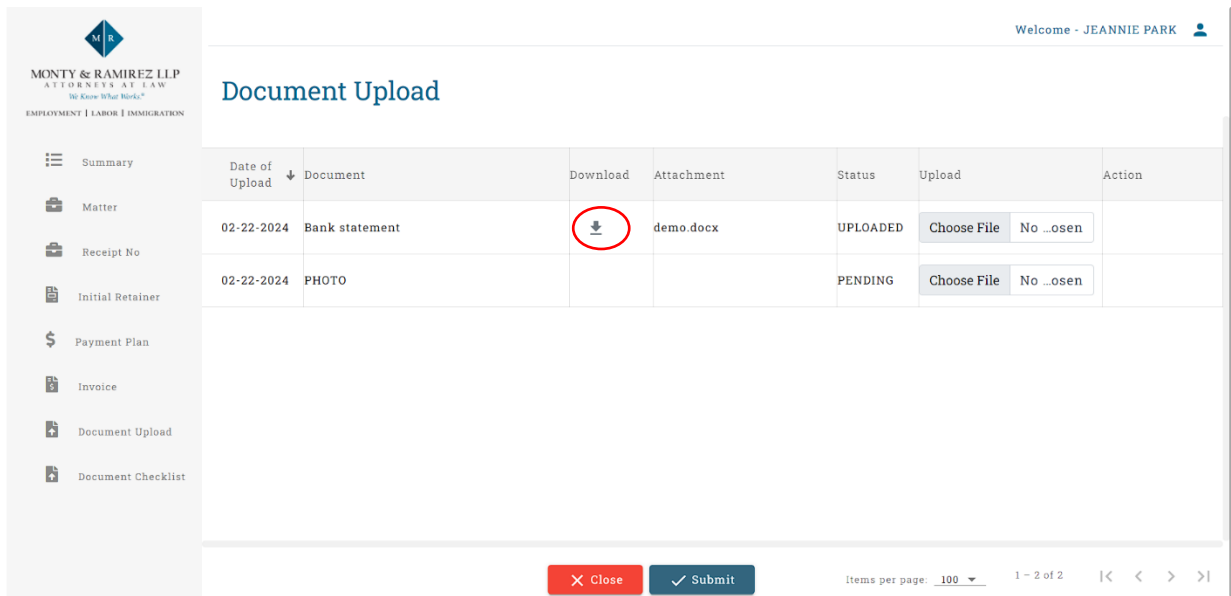
```
{
  "caseSubCategoryId": 252,
  "checkListNo": 9000082,
  "classId": 2,
  "clientId": "10135",
  "languageId": "EN",
  "matterNumber": "10135-02",
  "statusId": 60,
  "matterDocLists": [
    {
      "caseCategoryId": 18,
      "caseSubCategoryId": 252,
      "checkListNo": 9000082,
      "classId": 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



Date of Upload	Document	Download	Attachment	Status	Upload	Action
02-22-2024	Bank statement		demo.docx	UPLOADED	Choose File No ..osen	
02-22-2024	PHOTO			PENDING	Choose File No ..osen	

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:

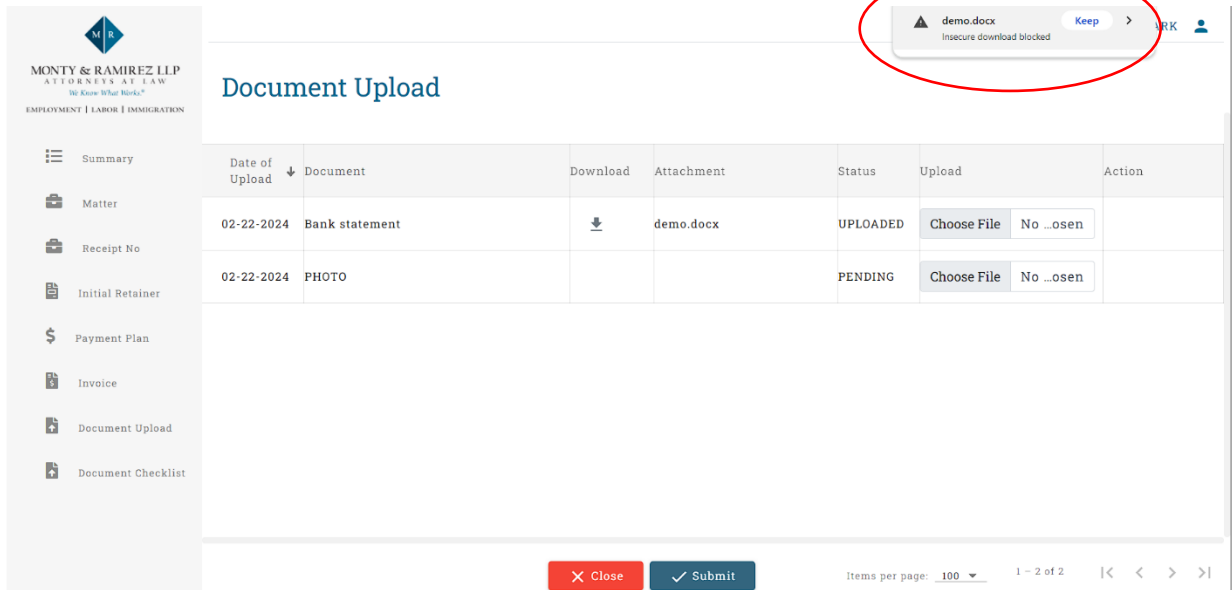
```
{
  "checkListNo": [
    "9000082"
  ]
}
```

### On-Download API Call:

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

#### Parameter:

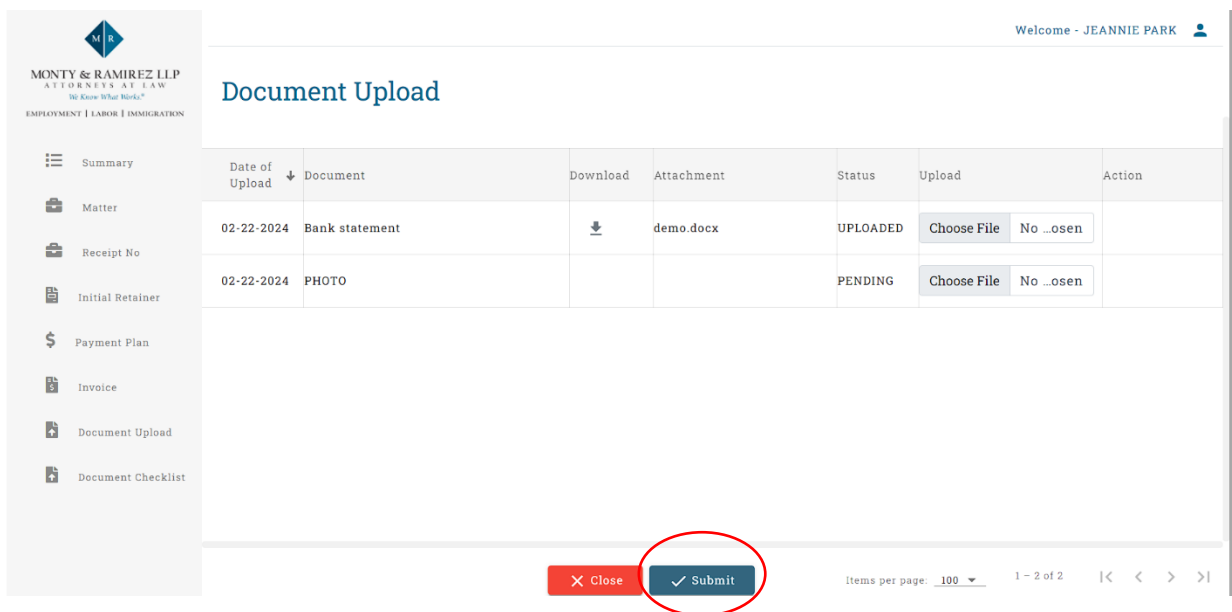
1. filename
2. location



The screenshot shows the 'Document Upload' page. A red circle highlights a security warning at the top right: 'demo.docx Insecure download blocked' with a 'Keep' button. The page includes a sidebar with navigation links and a table of uploads.

Date of Upload	Document	Download	Attachment	Status	Upload	Action
02-22-2024	Bank statement		demo.docx	UPLOADED	Choose File No ...osen	
02-22-2024	PHOTO			PENDING	Choose File No ...osen	

At the bottom, there are 'Close' and 'Submit' buttons, and pagination information: 'Items per page: 100 1 - 2 of 2'.



This screenshot is identical to the one above, but the 'Submit' button at the bottom is circled in red. The 'demo.docx' warning is no longer present.

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

### Initial API Call:

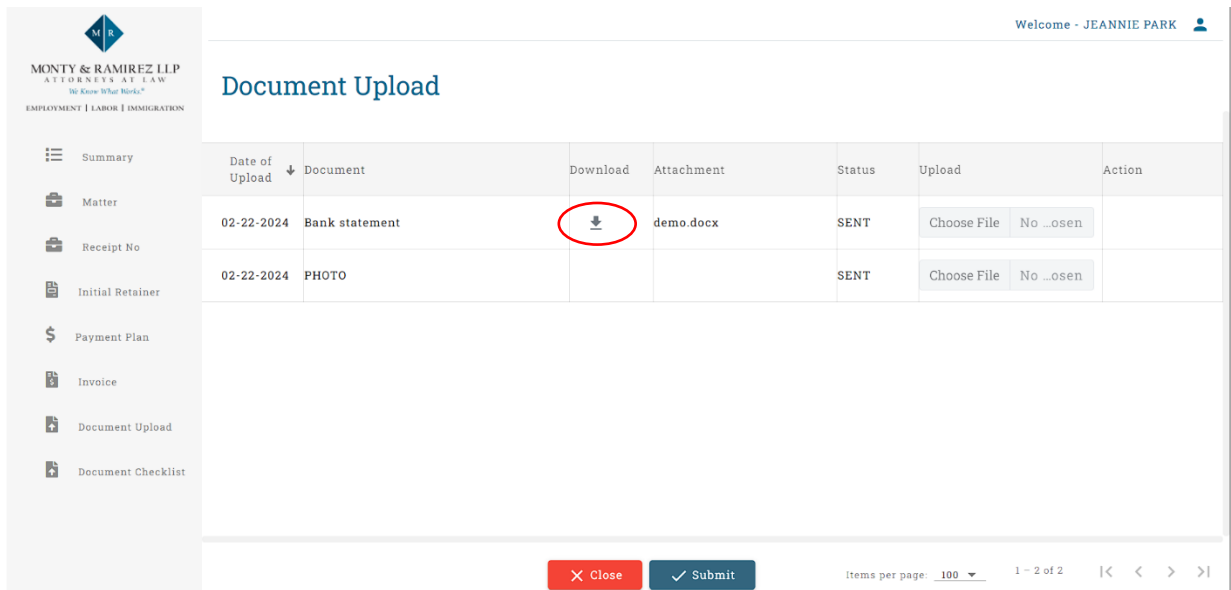
- <https://mrclara.com:27070/mnrclara/api/services/mnr-management-service/matterdoclist/10135-02/clientPortal/docCheckList> [GET]

### Parameters:


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



## After Submit download



Document Upload

Date of Upload	Document	Download	Attachment	Status	Upload	Action
02-22-2024	Bank statement		demo.docx	SENT	Choose File No ..osen	
02-22-2024	PHOTO			SENT	Choose File No ..osen	

Close Submit

Items per page: 100 1 - 2 of 2

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
```