Functionality doc of Advocate office management software :-

Dashboard -

Dashboard of the system will show the summary of system and some more important information related to current day. It shows the count of important information like (Clients, Cases, Starred Cases, Archived Cases, Employees, Tasks, Case Study, and My Tasks) and linked them to their pages. Also showing the Latest Notices, Today's To-do Lists, Today's Cases, Absent Employees List, Calendar of Appointments & Cases dates.

Note: All information is auto generated from the system based on data.

Header -

Header will show the information of logged in user. It also show the notifications of Leaves, To-do's, Appointments, Cases (Hearning Dates), Based on the settings of Notifications. Logged in user is able to change the language of system by language dropdown.

HR Management

Client is a person who employs or retains an attorney to represent him or her in any legal business. Admin can create clients, update / delete existing clients and also can export list of clients. Admin can also create custom fields for clients if needed by Custom Fields section.

[CLIENTS FORM]

Note : Username and Password will be used to login into the system

Employees

A person who is hired to provide services to a company on a regular basis in exchange for compensation and who does not provide these services as part of an independent business. Admin can create employees, update / delete existing employees and also can export list of employees. Admin can also create custom fields for employees if needed by Custom Fields section.

EMPLOYEES FORM

Note : Employee ID will be automatically generated which is started by already set in **Administrative -> General Settings -> HR Settings**

User Roles

In User Roles Section. Admin can create unlimited roles of user and can update / delete existing user roles.

USER ROLE FORM

Note : Administrator and Client Roles are fixed not deletable. Roles permission can be set by HR Management -> Permissions.

Departments

In Departments Section. Admin can create unlimited department and designations of that department and can update / delete existing departments and their designations.

DEPARTMENT FORM

Note : Departments and Designations are used while creating employee.

Permissions

In Permissions Section. Admin is able to set the permission of access of particular modules for system users of particular roles.

Holidays

Holidays is used to create list of holidays in companies. Admin is able to create unlimited holidays in the year or delete existing holidays.

HOLIDAY FORM

Notices

Notices is used to send any important information to all internal users of system. you can create notice and each user will get the Notice on their dashboard.

NOTICE FORM

Note : You can find the latest list of notices on Dashboard.

Leave Types

Leave Type is just use for informational purpose to know which type of leave is applied by employee. Admin can create unlimited leave types and can update /delete existing leave types. Leave type is used by employee panel where employee can apply leave he needs to select leave type with reason.

LEAVE TYPE FORM

Note : In Leave Notifications Section, You can get the list of applied leave with leave type.

Attendance

Attendance is used to check the attendance report for all employees or specific employee for particular period.

Leave Notification

If any employee will apply for leave then admin can approve / pending that application

Note : Table will show the entry if there is any application.

Cases:-

All Cases

Admin can create new cases and update existing cases. Admin can also move important cases to Starred Cases and old ones to Archived Cases. Cases Hearing Dates, Fees and Notes can be managed. Case need to move into Archived Section then can delete.

CASE FORM

- **Case Title:** Title of Case/Matter.
- **Case No:** Number of Case which is opted from Court.
- **Client Name:** Client belongs to particular case if not in list then need to Add New Client.
- **Location:** Location of court in which case is running. Obtained from Location Master.
- **Court Category:** Category of court in which case is running. Obtained from Court Category Master.
- **Court:** Name of Court in which case is running. Obtained from Court Master.
- **Case Category:** Category of Case. Obtained from Case Category Master.
- **Case Stage:** Current Stage of Case. Obtained from Case Stages Master.
- **Act:** Which Acts needs to perform in Case. Obtained from Act Master.
- **Description:** Description of Case.
- **Filling Date:** On Which Date case is filled in Court.
- **Hearing Date:** On Which Date First Hearing is held in Court.
- **Apposite Lawyer:** Name of Opposite Lawyer.

- **Total Fees:** Fees of Case.

INVOICE FORM

- **Invoice Number:** Invoice Number is auto generated based on **General Setting -> Details**.
- **Payment Mode:** Mode of Payment which is coming from Payment Mode Master.
- **Date:** Date of Invoice Creation
- **Amount:** Invoice Amount.
- **Tax:** Which Taxes need to apply (It can be multiple).
- **Total:** It is auto generated

HEARING DATE FORM

- **Next Date:** Next Date of case given by court for hearing.
- **Last Date:** Previous Date of case given by court for hearing / filling.
- **Notes:** Notes of Next Date for Hearing.
- **Attachment Document:** Attachments of Next Date for Hearing.

NOTES FORM

Admin can create notes for particular case for future use.

- **Notes** - Notes of Case.

Starred Cases

Starred Cases will show the list of cases which marked as important. After mark case Starred in All Cases, The case will show also in this list except Archived Cases. It is similar to All Cases

Archived Cases

Archived Cases will show the list of cases which marked as archived. After mark case Archived in All Cases, The case will show in this list. It is similar to All Cases except Admin can delete the Archived Case or Can restore to All Cases.

Note : Case cannot create from Archived Cases and also can delete only from here.

Tasks

Here Tasks is related to Case. Admin can assign Task to multiple staff members. Let your staff comments on Tasks. Admin can create unlimited tasks and can update / delete existing tasks.

TASK FORM

- **Name:** Name of the Task.
- **Priority:** Priority of Task (Low, Medium , High).
- **Due Date:** Expected Completion Date.
- **Case:** Task Belongs to Which Case.
- **Assigned To:** Task Assigned to Which Employees (It Can Be Multiple).
- **Progress:** Task Progress (in Percentage).
- **Description:** Description of Task.

Note : In My Task, Tasks will show based on logged in employee.

Documents

Admin can create unlimited documents realted to case or only for reference and update / delete existing documents.

DOCUMENT GALLERY FORM

- **Type:** Type of Document (for Related to Case Select Case or For Reference Select Other) .
- **Case:** Select Appropiate Case (It will show if the type of document is Case).
- **Title:** Title of Document Gallery.

DOCUMENT FORM

- **Title:** Title of Document.
- **File:** File Attachment of Document.

Note : Document can be created after Document Gallery Creation via Manage Link.

Others:-

Case Study

Case Study is used to create reference cases for future use. User can create unlimited case studies along with attachments of multiple Case Categories and can update / delete existing case studies.

CASE CATEGORY FORM

- **Title:** Title of Case Study.
- **Case Category:** Case Categories of Case Study.
- **Notes:** Any Notes related to Case Study for future reference.
- **Result:** What was the result of Case?.

Note : Case Study is only associated with the Case Category not Case.

Reports

Reports will show the earnings of the Law Firm. It can be viewed By Month, By Week, By Year and By Client Using Graph.

Messages

In Messages Section, User is able to reply the messages of another user. if there is any unread messages then it shows the count of messages highlighted.

To Do List

To Do List defines list of tasks needs to remind on particular date, User is able to create unlimited To Do Tasks and can update / delete existing To Do Tasks. In Header User will get notification on particular date.

Contacts

In Contacts Section, User is able create unlimited contacts and update / delete existing contacts. User is able to bulk import and can export as well. Contacts will be used in appointments section. It can be your personal contact or any client.

CONTACT FORM

- **Name:** Name of Contact Person.
- **Phone:** Phone Number of Contact Person.
- **Email:** Email Address of Contact Person.
- **Address:** Address of Contact Person.

Custom Fields

In this Section, User is able create unlimited fields for particular forms (Ex. Clients, Case, To Do, Contacts, Appointments, Employees and Tasks), fields type can be Text Box, Dropdown List, Radio Button, Checkbox, Textarea, URL, Email and Phone.

CUSTOM FIELD FORM

- **Select Form:** In which form user want to add the field ?.
- **Field Type:** Which type of field want to add?.
- **Field Name:** Label of field.
- **Enter Field Values:** It will needed when field types are Dropdown List, Radio Button, Checkbox. Values should be comma seperated.
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Appointments -

In this Section, User is able create unlimited appointments with their contacts. To add appointment first you need to create contacts. User will get appointment notification based on their notification setting in header.

APPOINTMENT FORM

- **Title:** Title of appointment.
- **Contact:** Conact Person of Appointment.
- **Motive:** Motive of Appointment.
- **Date:** Date & Time of Appointment.
- **Notes:** Notes on Appointment.