Client Center –

Every client will have a username and password – each client will have a unique Client number based on the Lawfirms nomenclature.

Disclaimer

1. Matter Details
   1. Matter update/details – Case name, case status, forum and etc.
   2. Court orders;
   3. Next Dates;
   4. Client specific Court Calendar/ Sitting updates
2. Document repository (This would be assignment/matter wise)
   1. All final and executed documents/ pleadings/ agreements;
   2. Work in Progress Drafts sent to the client for approval- The client may accept the draft or reserve it for comments (the client would not be able to see the internal status of the drafts).
3. Billing Center
   1. All invoices raised – with indication of whether they are cleared or not
   2. Pending Fee
   3. For hourly assignment – the number of hours already spent.

    4. Automatic invoice generation.
    5. Payment Gateway is optional at the moment.
4. Message Center
    1. The Clients can send a quick message or comment to us on the app; - The same would be sent to all the team members on email and a notification will be sent on the app.
    2. Anonymous Feedback form.
5. Client specific updates
    1. The normal PSL updates in the form of articles, can also be marked to the client which will appear in the client section under this category.
6. Meeting Scheduler
    1. Client should be able to request a meeting with the partner/ team (matter specific/general);
    2. The Client would be able to see if his request has been accepted/rejected/rescheduled with reasons for the same.
    3. Possible Cisco WebEx integration in order to schedule and share dial-in details.
    4. The calendar also should show his court specific calendar and national holiday calendar.

The client center will also indicate, to each client, the following:

1. Client code- the Admin will be able to issue multiple codes to the same Client and restrict matters that each individual code can be used to access.
2. Change password;
3. The execution team member’s details;
4. Execution partner with details.

Public Center

1. Firm Profile – General;
2. Sectoral Profiles;
3. Articles written by PSL Lawyers – Bifurcated under different laws
4. Press Releases – Bifurcated under different laws
5. Notes – Bifurcated under different laws
6. Awards and accolades;
7. Media;
8. Contact Us

PSL Centre

This will be the backend software/ app to do the above. The access would be based on the person eg. Managing Partners will have all the access. Also, through this app, the Partners should be able to allot matters to team members who will then be required to update the progress. The Partners should also be able to add Clients, matters and employees, decide permissions, have admin rights over the entire App/portal in order to edit any detail/post, and add any sub-admins (with or without restrictions)

It also needs to have an invoice generation system. Senior team members will be able to see internal progress of the matter, which would be required to be updated by the team members assigned to the matter.

Team Members marked on a particular matter would be able to access details w.r.t. the matter, upload documents, communicate with the Client, respond to messages, accept/reject/reschedule meeting requests, update draft status (visible only to internal team), raise invoices and etc.

Digital Security

Legal profession has confidentiality issues thus all of the above needs to be very secure and the access needs to be monitored and the files need to be on secure servers. We have Microsoft365 accounts and that can be used as an exclusive repository.

1. Super Admin

a. Manage Firm
b. Manage Users
c. Manage Roles and Access to Clients, Matters
d. Add Clients and Matters- input industry area
e. Manage Pendency
f. Reports
    i. Entire Firm
    ii. Client Wise
    iii. Matter Wise
    iv. User
g. Assign Matters to team members
h. Billing and Finances
i. Add activity
j. Switch Roles
k. Invoices

2. Lawyers

a. Register and Complete Profile
b. Manage Clients ?
c. Matters
d. Add activity
e. Invoices
f. Calendar
g. Cause List
h. Assigned Cases
i. Judges On leave
j. Document Management (We plan to integrate office 365 here)
    i. My Files
    ii. Document Vault
    iii. Shared with me

Contracts/Case onboarding point

1. Single point for onboarding any new case, transaction or advisory (basis selection different inputs will be required)
2. Industry and practice area
3. Laws involved
4. Variables will be given for fees eg. advance, retainer, drafting of pleadings, drafting of applications, hearings- effective and non-effective plus custom option.
5. Respondent to be changed to opposite party (not mandatory)
6. Cases- option to select if filed case or draft case. Can change a draft case to a filed one later.

Role	**Add Users**	**Decide Access Levels (for both Client and internal user)**	**Add Team Members**	**Add Clients**	**Decide Access**	**Add Matters**	**Upload Documents**	**Add/Raise Invoices**	**Manage Public Centre**	**Add Tasks**	**Scheduling Meetings**
Super Admin	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
PSL User-Senior Associate	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	Y
PSL User-Associate Level	N	N	N	N	N	Y	Y	Y	N	Y	Y

3. Report/Dashboard Details

The Super Admin will be able to assign special roles to each user in case need be. For example, Anant is authorised by the Super Admin to Manage the Public Centre or to add clients.
Super Admin will be given a report of the entire firm and its working. They will be able to see data for

1) entire firm
2) client wise
3) matter wise and
4) User wise

For eg. In User wise data, the Super Admin will be able to see the matters an individual is working on, his current pendency, deliverables, invoices raised, status of drafts, average time taken for completion of a task and etc.

For users, the Dashboard will present data on the Individuals tasks and matters.