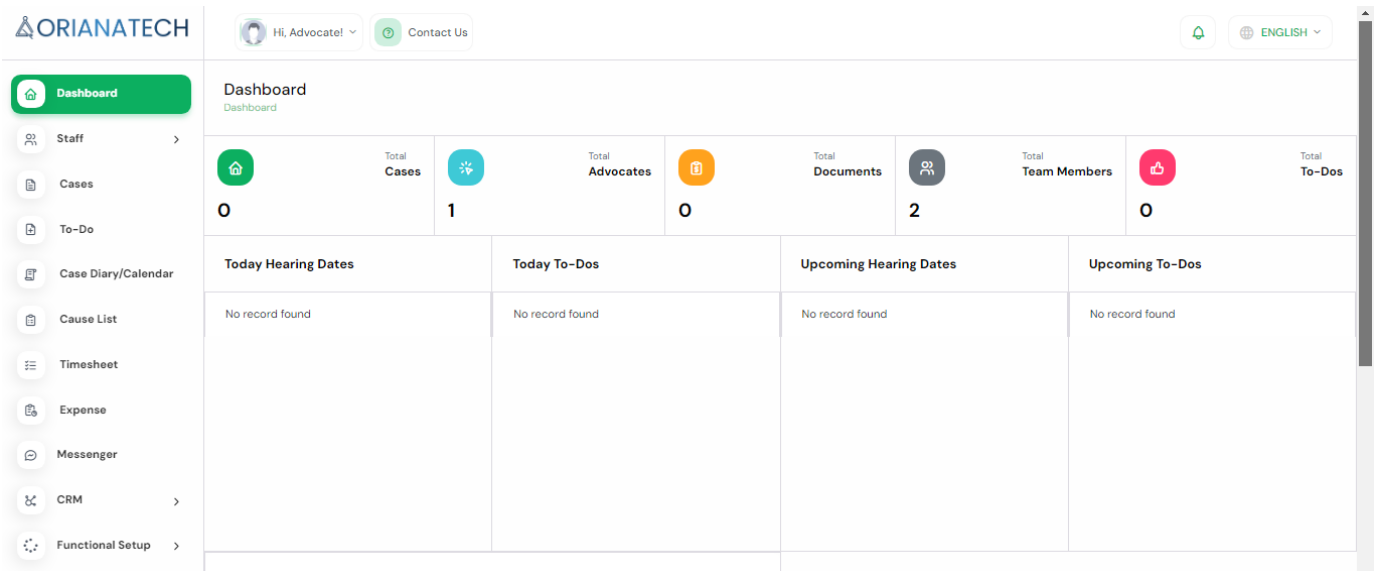


Advocate Portal Dashboard

The Dashboard serves as a centralized hub for advocates to efficiently manage and monitor their cases. It provides a snapshot of key metrics and activities within the system.



Below are the essential components of the Dashboard:

1. Total Cases :

Displays the total number of cases associated with the advocate, including active, closed, and pending cases.

Example : Total Cases - 0

2. Total Advocates :

Indicates the total number of advocates collaborating on cases within the system. This may include co-advocates, legal partners, or other relevant advocates.

Example : Total Advocates – 1

3. Total Documents :

Displays the total number of documents linked to the advocate's cases. These documents may include legal papers, contracts, or any relevant files.

Example : Total Documents – 0

4. Total Members :

Lists the team members or colleagues collaborating on the advocate's cases. This includes co-advocates, legal assistants, or any other relevant personnel.

Example : Total Members - 2

Advocate Portal Dashboard

5. Total To-dos :

Highlights the number of pending tasks or to-dos specific to the advocate's cases. This section includes upcoming deadlines, assigned tasks, or any actionable items.

Example : Total To-dos – 0

Below the aforementioned components, advocates can access detailed information in columns that focus on key aspects of their caseload:

Today Hearing Dates	Today To-Dos	Upcoming Hearing Dates	Upcoming To-Dos
No record found	No record found	No record found	No record found

1. Today Hearing Dates :

This column provides an overview of all scheduled hearings for the current day associated with the advocate's cases.

Example : Case A: 10:00 AM - Courtroom 1
Case B: 2:30 PM – Client Meeting

2. Today To-dos :

Lists the tasks or to-dos that are due on the current day. Advocates can quickly identify and address tasks that require immediate attention.

Example : - Case A: Prepare legal brief

3. Upcoming Hearing Dates :

Displays upcoming hearing dates for the advocate's cases.

Example : Case A: 2024-04-10

4. Upcoming To-dos :

Highlights upcoming tasks or to-dos beyond the current day.

Example : Case A: Draft client contract

Advocate Portal Dashboard

After the detailed columns, advocates can access the Calendar View section to visualize and manage orders on specific dates. This feature provides a clear overview of order dates and associated details.

Calendar View :

The screenshot displays the Advocate Portal Dashboard. On the left is a sidebar with navigation options: Dashboard (selected), Staff, Cases, To-Do, Case Diary/Calendar, Cause List, Timesheet, Expense, Messenger, CRM, and Functional Setup. The main content area is titled 'Calendar' and shows a calendar for March 2024. The calendar has a header with navigation arrows, a 'Today' button, the month 'MARCH 2024', and view options for 'Month', 'Week', and 'Day'. The calendar grid shows dates from 25 to 31. The date 9 is highlighted in yellow. At the bottom of the calendar, it says 'OTS 2024'.

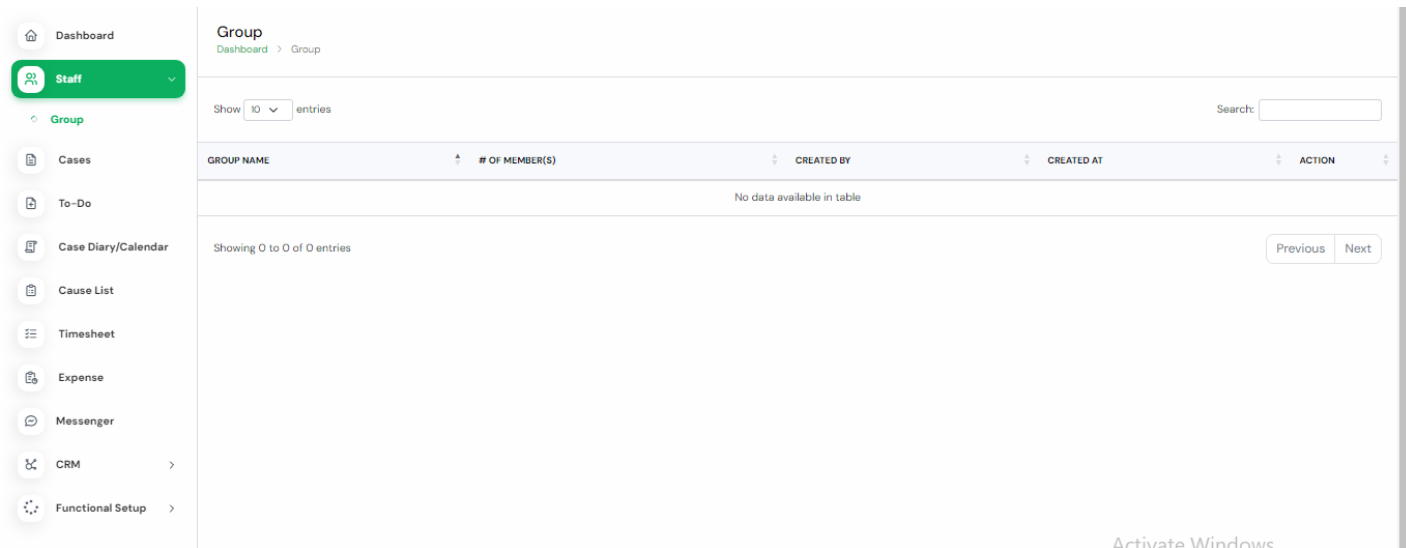
Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26	27	28	29	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

The Calendar View displays order details based on specific dates. Advocates can navigate through the calendar to review and manage orders efficiently.

Staff

Groups Section

The "Groups" section in the sidebar allows advocates to view and manage groups within the system. This section provides a detailed list of groups along with relevant information. Here are the key components of the "Groups" section:



Groups List

Advocates can find a comprehensive list of groups, each displaying the following details:

- 1. Group Name**
The name of the group, providing a quick identifier.
- 2. # of Members**
Indicates the number of members associated with each group.
- 3. Created By**
Displays the advocate or user who created the group.
- 4. Created At**
Shows the timestamp when the group was created.
- 5. Action**
Provides options for advocates to take actions related to the group, such as editing or deleting.

Staff

Search Option

At the top right corner of the "Groups" section, advocates can find a search option to search for a specific group within all entries. This functionality allows for quick and efficient navigation.

Advocates can use the search option to locate a particular group based on its name.

Cases

The "Cases" section in the sidebar allows advocates to view, manage, and interact with cases within the system. This section provides a detailed list of cases along with relevant actions and features. Here are the key components of the "Cases" section:

The screenshot shows the ORIANATECH web application interface. The top navigation bar includes the logo, user profile (Hi, Advocate!), and a Contact Us button. The sidebar on the left lists various modules, with 'Cases' highlighted in green. The main content area is titled 'Case' and shows a breadcrumb 'Dashboard > Case'. Below the title, there is a search bar and a table with columns: S.NO., TITLE, CASE NO., YEAR, COURTS/TRIBUNAL, ADVOCATE, DATE OF FILING, and ACTION. The table currently displays 'No data available in table' and 'Showing 0 to 0 of 0 entries'.

Cases List

Advocates can find a comprehensive list of cases, each displaying the following details:

- 1. S.NO.**
A sequential number assigned to each case for reference.
- 2. Title**
The title or name of the case, providing a quick identifier.
- 3. Case No.**
A unique case number assigned to each case.
- 4. Year**
The year in which the case was filed or initiated.
- 5. Courts/Tribunal**
Indicates the court or tribunal associated with the case.
- 6. Advocate**
The advocate(s) representing the case.

Cases

7. Date Of Filing

The date when the case was officially filed.

8. Action

Provides options for advocates to take actions related to the case, such as editing or deleting.

Action Buttons

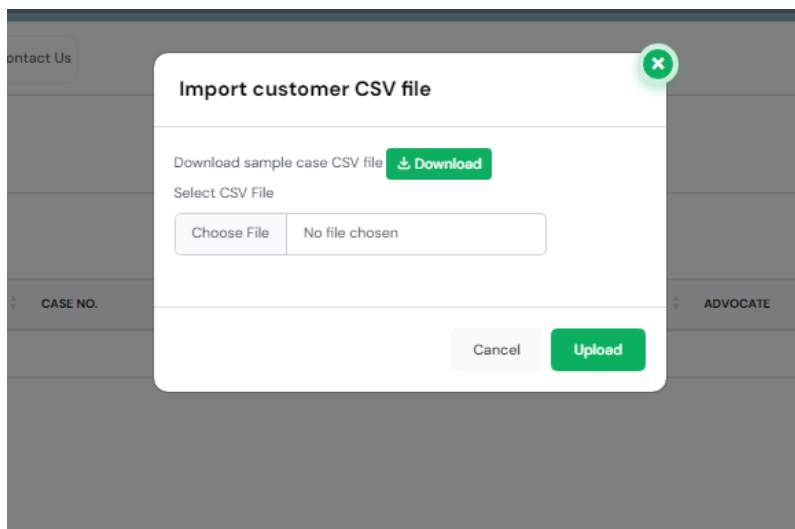
At the top right corner of the "Cases" section, advocates can find three buttons for convenient case management:

1. Add a Case

Allows advocates to add a new case to the system.

2. Import Cases

Enables advocates to import cases using a CSV file. Clicking on this button opens a pop-up to add a CSV file.

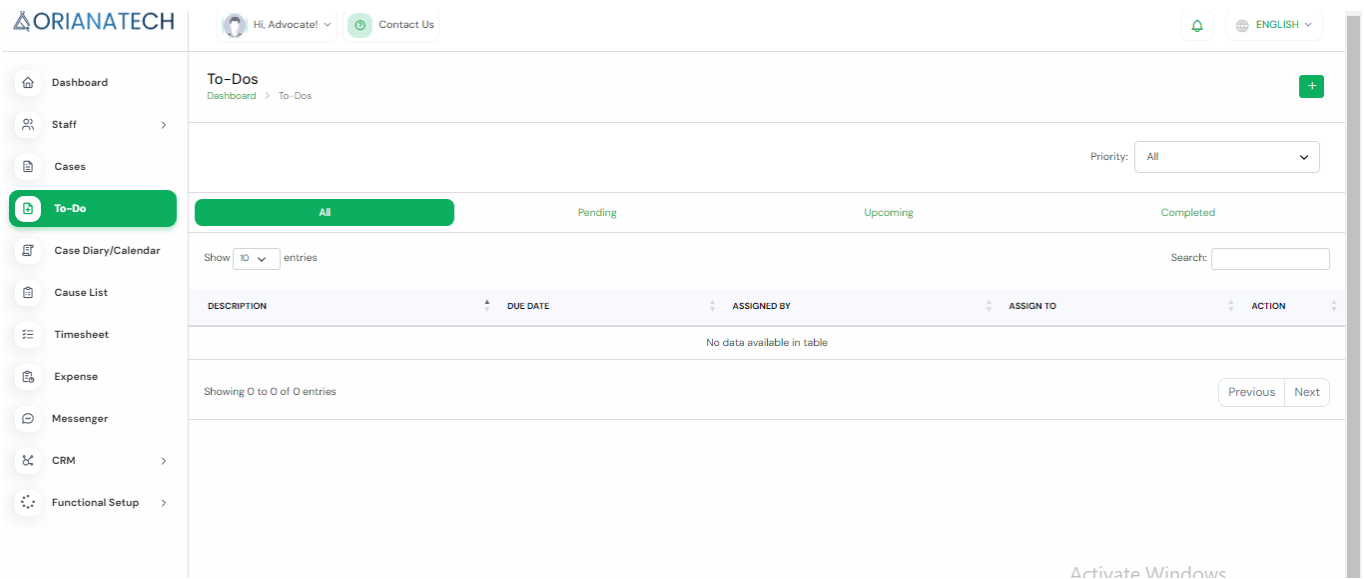


3. Export Cases

Allows advocates to export the list of cases to an Excel document. Clicking on this button initiates the download of an Excel file containing case details.

To-Dos

The "To-dos" section in the sidebar enables advocates to manage and track their tasks efficiently. This section provides a list of to-dos with options to filter by priority and tabs for different states. Here are the key components of the "To-dos" section:



1. Create New To-do

At the top right corner of the "To-dos" section, advocates can find a button to create a new to-do. Clicking on this button initiates the process of adding a new task.

2. Priority Dropdown

Below the "Create New To-do" button, there is a dropdown menu allowing advocates to filter to-dos by priority. The options include:

- All
- Urgent
- High
- Medium
- Low

Advocates can choose a specific priority level to filter the displayed todos.

To-Dos

3. Todo Tabs

Below the priority dropdown, advocates can find tabs that categorize todos based on their status:

3.1 All

Displays all todos, regardless of their current status.

3.2 Pending

Filters and displays only pending todos.

3.3 Upcoming

Filters and displays todos with upcoming due dates.

3.4 Completed

Filters and displays todos that have been marked as completed.

4. Search Option

At the top of the "Todos" section, advocates can utilize a search option to quickly find a specific todo based on its description, due date, or other relevant details.

5. Todos List

Beneath the tabs, advocates can find a list of todos, each displaying the following details:

5.1 Description

Describes the task or todo.

5.2 Due Date

Specifies the deadline or due date for completing the todo.

5.3 Assigned By

Indicates the advocate or user who assigned the todo.

5.4 Assigned To

Specifies the advocate to whom the todo is assigned.

5.5 Action

Provides options for advocates to take actions related to the todo, such as marking as completed or deleting.

Case Diary/Calendar

Access Path: Dashboard > My Today's Case Diary

Page Overview: The "My Today's Case Diary" page serves as a dynamic planner for legal professionals, offering a detailed view of scheduled cases and tasks. It is designed to ensure efficient management of daily legal activities.

The screenshot displays the 'My Today's Case Diary' interface. It features a sidebar with navigation options, a main header with the user's name and a 'Contact Us' button, and a 'Calendar View' button. The main content area is divided into two sections: 'Cases' and 'To-Dos'. Both sections have a table with headers and a search bar. The 'Cases' table has columns for #, COURTS/TRIBUNAL, CASE, CLIENT(S) / ADVOCATE(S), TEAM MEMBER, COURT HALL, and JUDGES. The 'To-Dos' table has columns for #, DESCRIPTION, DUE DATE & TIME, CASE, ASSIGNED BY, and ASSIGNED TO. Both tables are currently empty, showing 'No data available in table'. There are also date pickers for 'From' and 'To' at the top of the main content area.

Main Features & Functionalities:

1. Date Filter:

Use the date pickers to filter case diary entries by specific dates, streamlining the focus on daily tasks.

2. Calendar View:

The calendar view button provides a visual representation of the scheduled cases and tasks, offering a different perspective on the day's agenda.

3. Cases Section:

3.1. Court/Tribunal:

Lists the court or tribunal where the case is scheduled.

Case Diary/Calendar

3.2. Case:

Displays the case number or title for quick reference.

3.3. Clients/Advocates:

Shows the names of clients and their advocates.

3.4. Team Member:

Indicates the team member assigned to the case.

3.5. Court Hall:

Specifies the location within the court for the case.

3.6. Judge:

Names the judge presiding over the case.

This section is essential for planning and preparing for the day's legal proceedings.

4. To-Dos Section:

a. Description:

Provides a brief overview of the task at hand.

b. Due Date & Time:

Specifies when the task is scheduled to be completed.

c. Case:

Connects the task to a specific case, if applicable.

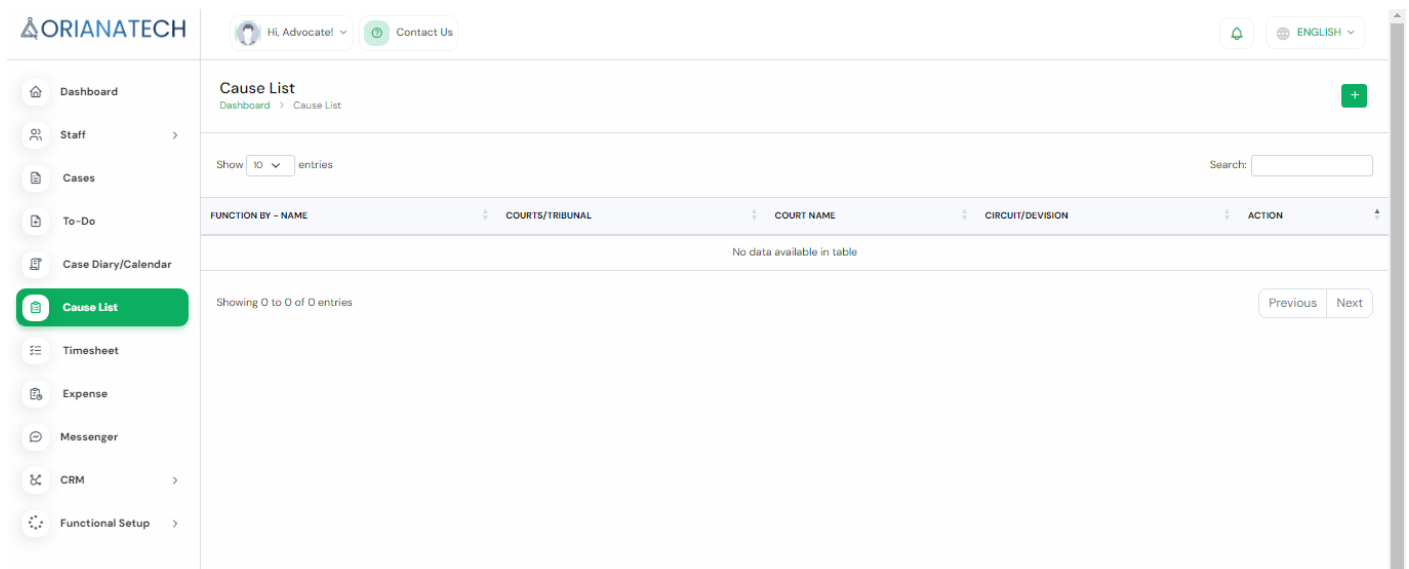
d. Assigned By:

Indicates who assigned the task, ensuring accountability.

This section helps prioritize tasks and manage time effectively.

Cause List

The "Cause List" section in the sidebar allows advocates to manage and track causes efficiently. This section provides options to create new causes, search within the list, and view a list of existing causes. Here are the key components of the "Cause List" section:



Create Cause Button

At the top right corner of the "Cause List" section, advocates can find a button to create a new cause. Clicking on this button opens a pop-up form to add details for the new cause.

1. New Cause Pop-up Form

Upon clicking the "Create Cause" button, advocates are presented with a pop-up form where they can add details for the new cause. The form includes the following fields:

A screenshot of a pop-up form titled 'Add Cause'. The form has a close button (X) in the top right corner. It contains three input fields: 'Courts/Tribunal' with a dropdown menu showing 'Please Select', 'Causelist By' with a dropdown menu showing 'Advocate Name', and 'Advocate Name' with a text input field. At the bottom of the form are two buttons: 'Cancel' and 'Create'.

Cause List

1.1 Courts/Tribunal

Allows advocates to specify the court or tribunal associated with the cause.

1.2 Causelist By

Specifies the user or advocate who created the cause.

1.3 Advocate Name

Allows advocates to assign an advocate to the cause.

2. Search Tab

Below the "Create Cause" button, advocates can find a search tab to search within the cause list. This functionality allows for quick and efficient navigation within the list of causes.

3. Cause List

Below the search tab, advocates can find a list of causes, each displaying the following details:

3.1 Function By – Name :

Displays the function performed by the advocate, followed by the name of the cause.

3.2 Courts/Tribunal:

Indicates the court or tribunal associated with the cause.

3.3 Court Name:

Specifies the name of the court.

3.4 Circuit/Division :

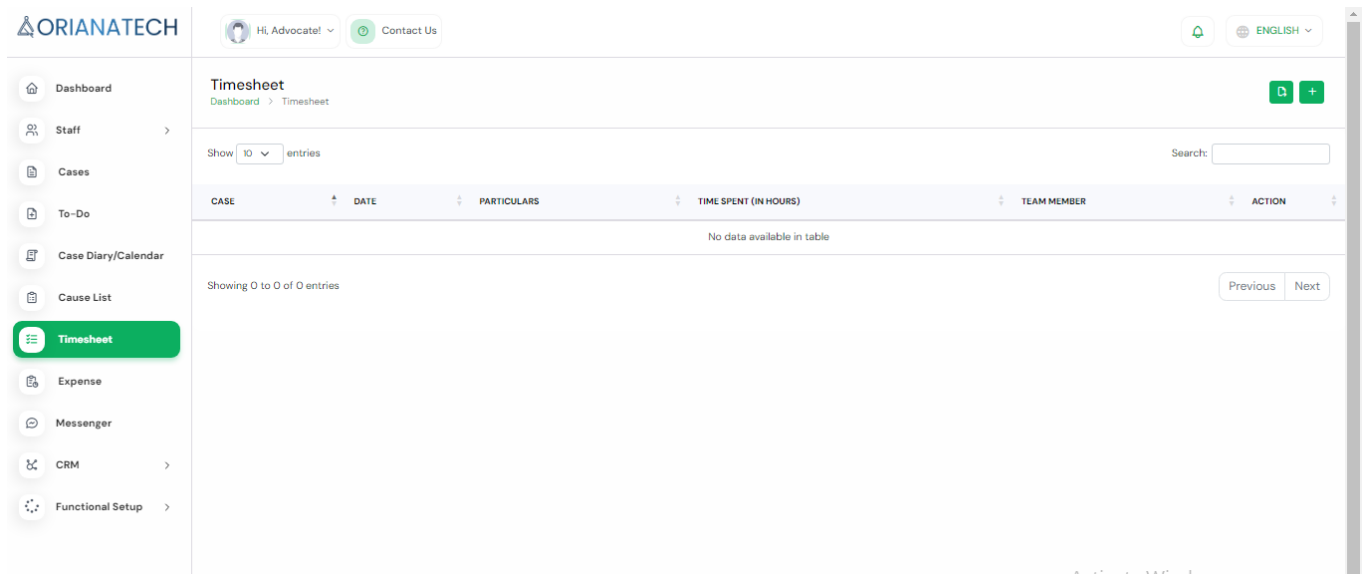
Indicates the circuit or division relevant to the cause.

3.5 Action:

Provides options for advocates to take actions related to the cause, such as editing or deleting.

Timesheet

The "Timesheet" section in the sidebar allows advocates to track and manage their time spent on various activities related to cases. This section provides options to create new timesheets, search within the list, export timesheets, and view a list of existing timesheets. Here are the key components of the "Timesheet" section:



1. Create New Timesheet Button

At the top right corner of the "Timesheet" section, advocates can find a button to create a new timesheet. Clicking on this button opens a pop-up form to add details for the new timesheet.

1.1 New Timesheet Pop-up Form

Upon clicking the "Create New Timesheet" button, advocates are presented with a pop-up form where they can add details for the new timesheet. The form includes the following fields:

Timesheet

Add Time Entry

Case

Date

Particulars

Time Spent (in Hours)

Advocate

Cancel Create

1.1.1 Case

Allows advocates to specify the case associated with the timesheet.

1.1.2 Date

Specifies the date for which the timesheet is being recorded.

1.1.3 Particulars

Describes the particular activity or task being recorded in the timesheet.

1.1.4 Time Spent

Allows advocates to specify the time spent on the particular activity, typically in hours.

Timesheet

1.1.5 Advocate

Specifies the advocate who recorded the timesheet.

2. Export Timesheet Button

At the top right corner of the "Timesheet" section, advocates can find a button to export timesheets as an Excel file. Clicking on this button initiates the download of an Excel file containing timesheet details.

3. Search Tab

Below the export button, advocates can find a search tab to search within the timesheet list. This functionality allows for quick and efficient navigation within the list of timesheets.

4. Timesheet List

Below the search tab, advocates can find a list of timesheets, each displaying the following details:

4.1 Case

Specifies the case associated with the timesheet.

4.2 Date

Specifies the date for which the timesheet is recorded.

4.3 Particulars

Describes the particular activity or task recorded in the timesheet.

4.4 Time Spent (in Hours)

Indicates the time spent on the particular activity, typically in hours.

4.5 Team Member

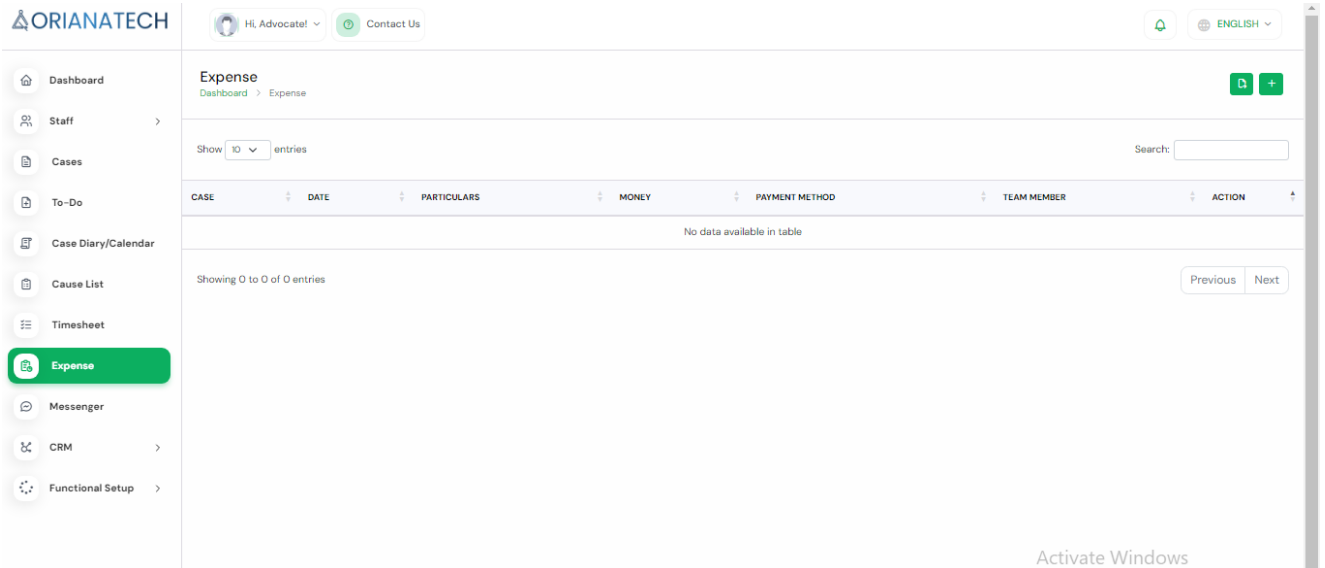
Specifies the advocate who recorded the timesheet.

4.6 Action

Provides options for advocates to take actions related to the timesheet, such as editing or deleting.

Expense

The "Expense" section in the sidebar allows advocates to track and manage their expenses related to cases. This section provides options to create new expenses, search within the list, export expenses, and view a list of existing expenses. Here are the key components of the "Expense" section:



1. Create New Expense Button

At the top right corner of the "Expense" section, advocates can find a button to create a new expense. Clicking on this button opens a pop-up form to add details for the new expense.

2. New Expense Pop-up Form

Upon clicking the "Create New Expense" button, advocates are presented with a pop-up form where they can add details for the new expense. The form includes the following fields:

Expense

The image shows a mobile application form titled "Add Expense". The form is enclosed in a grey border with a close button (X) in the top right corner. The form fields are as follows:

- Case:** A dropdown menu.
- Date:** A text input field with a placeholder "DD/MM/YYYY".
- Particulars:** A text input field.
- Money Spent:** A text input field.
- Payment Method:** A dropdown menu with "Bank Transfer" selected.
- Advocate/Member:** A dropdown menu with "Advocate" selected.
- Notes:** A text input field.

At the bottom of the form, there are two buttons: "Cancel" (grey) and "Create" (green).

2.2. **Case**

Allows advocates to specify the case associated with the expense.

2.3. **Date**

Specifies the date for which the expense is recorded.

2.4. **Particulars**

Describes the particular expense or item being recorded.

2.5. **Money Spent**

Specifies the amount of money spent on the expense.

2.6. **Payment Method**

Indicates the method of payment used for the expense.

2.7. **Advocate**

Specifies the advocate who recorded the expense.

2.8. **Notes**

Allows advocates to add any additional notes or details regarding the expense.

3. **Export Expense Button**

At the top right corner of the "Expense" section, advocates can find a button to export

Expense

expenses as an Excel file. Clicking on this button initiates the download of an Excel file containing expense details.

4. Search Tab

Below the export button, advocates can find a search tab to search within the expense list. This functionality allows for quick and efficient navigation within the list of expenses.

5. Expense List

Below the search tab, advocates can find a list of expenses, each displaying the following details:

5.1 Case

Specifies the case associated with the expense.

5.2 Date

Specifies the date for which the expense is recorded.

5.3 Particulars

Describes the particular expense or item recorded.

5.4 Money

Indicates the amount of money spent on the expense.

5.5 Payment Method

Indicates the method of payment used for the expense.

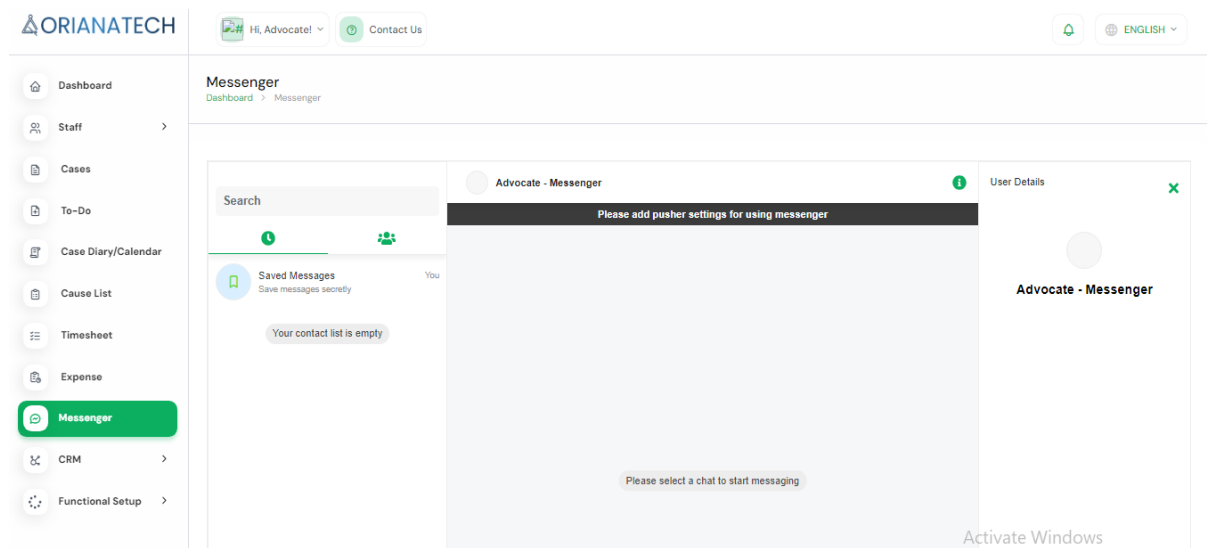
5.6 Team Member

Specifies the advocate who recorded the expense.

5.7 Action

Provides options for advocates to take actions related to the expense, such as editing or deleting.

Messenger



1. Search Bar

Located at the top left of the Messenger page, this feature allows users to quickly find specific messages or contacts. Users can type keywords or names into the search bar to filter their messages or contacts.

2. Saved Messages

Located below the search bar, this section allows users to access their saved messages. Users can store important or frequently accessed messages here for quick retrieval.

3. Contact List

This area, which is currently empty in the image, will display a list of contacts with whom the user can exchange messages. Users can click on a contact to open a chat window.

4. Chat Window

On the right side of the page, there is an area designated for chat windows. Here, users can view their message exchanges with selected contacts. Currently, it's displaying a prompt asking to add partner settings for using the messenger.

5. User Details

Above the chat window on the right side, there is an area that displays user details. It provides information about who is currently logged in and using the Messenger service.

CRM - Deals

The screenshot displays the CRM - Deals dashboard. The main content area features four summary cards: 'Total Deals' (red icon), 'This Month Deals' (green icon), 'This Week Deals' (pink icon), and 'Last 30 Days Deals' (blue icon). All cards show 'No data available'. The left sidebar lists navigation options: Dashboard, Staff, Cases, To-Do, Case Diary/Calendar, Cause List, Timesheet, Expense, Messenger, CRM (highlighted), Deal, and Functional Setup. The top header shows the ORIANATECH logo, user profile (Hi, Advocate!), contact button, and language selector (ENGLISH).

1. Total Deals

This red field displays the total number of deals that have been made.

2. This Month Deals

This green field shows the number of deals that have been made in the current month.

3. This Week Deals

The pink field indicates the number of deals made in the current week.

4. Last 30 Days Deals

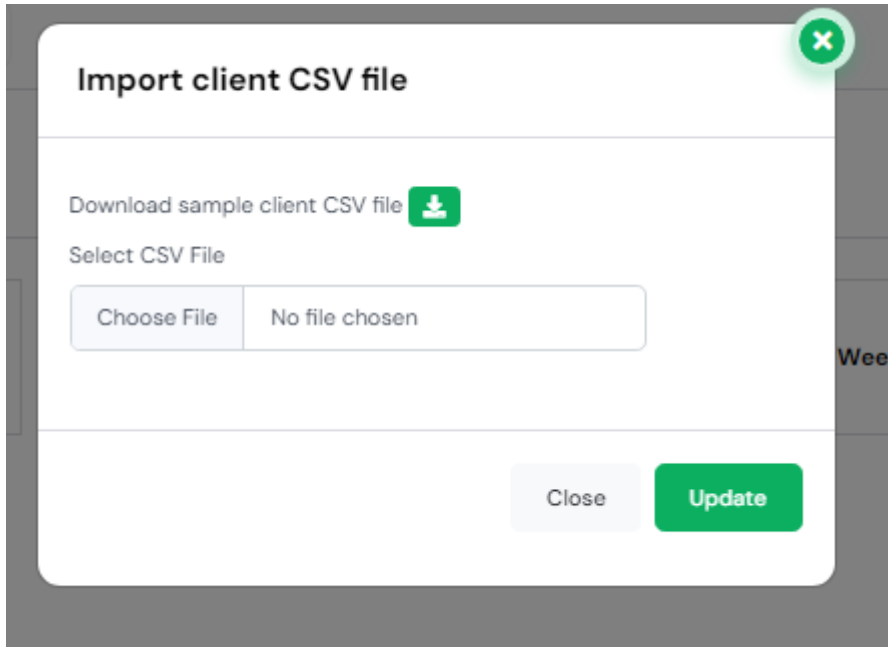
The blue field displays the number of deals made in the last 30 days.

CRM - Deals

It provides options to import and export deals, create new deals, and view a list of existing deals. Here are the key components of the "CRM Deals" page:

1. Import Button

At the top right corner of the "CRM Deals" page, advocates can find a button to import deals. Clicking on this button opens a pop-up form where advocates can add deals by uploading a CSV file.



The screenshot shows a pop-up form titled "Import client CSV file" with a close button (X) in the top right corner. The form contains the following elements:

- A link to "Download sample client CSV file" with a download icon.
- A section labeled "Select CSV File" containing a "Choose File" button and the text "No file chosen".
- At the bottom, there are two buttons: "Close" and "Update".

2. Export Button

Adjacent to the import button, advocates can find a button to export deals. Clicking on this button initiates the download of an Excel file containing deal details.

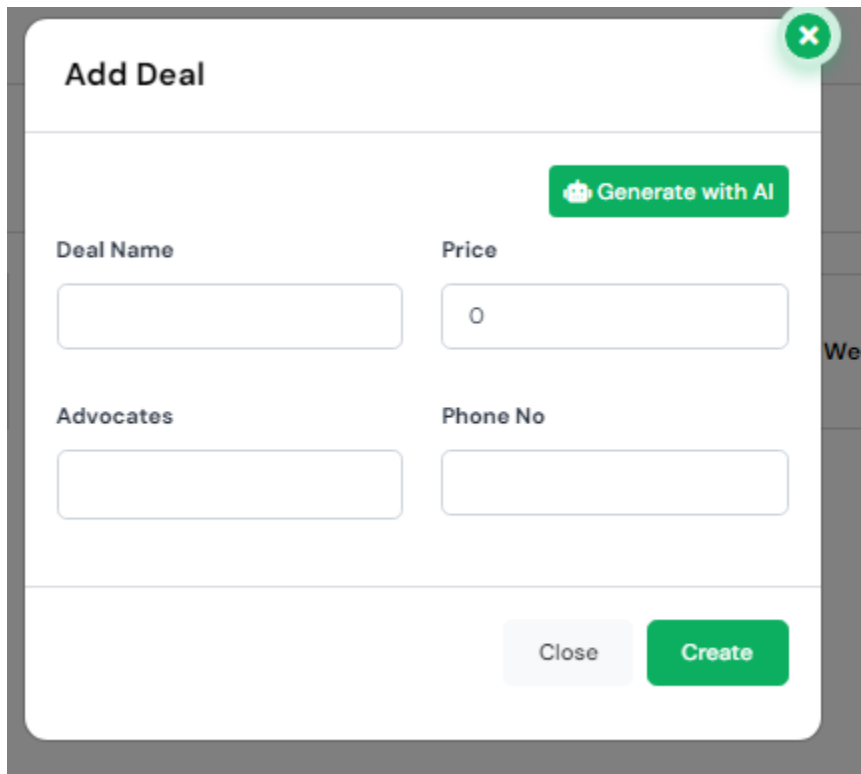
3. Create New Deal Button

Adjacent to the export button, advocates can find a button to create a new deal. Clicking on this button opens a pop-up form where advocates can add details for the new deal.

New Deal Pop-up Form

Upon clicking the "Create New Deal" button, advocates are presented with a pop-up form where they can add details for the new deal. The form includes the following fields:

CRM - Deals



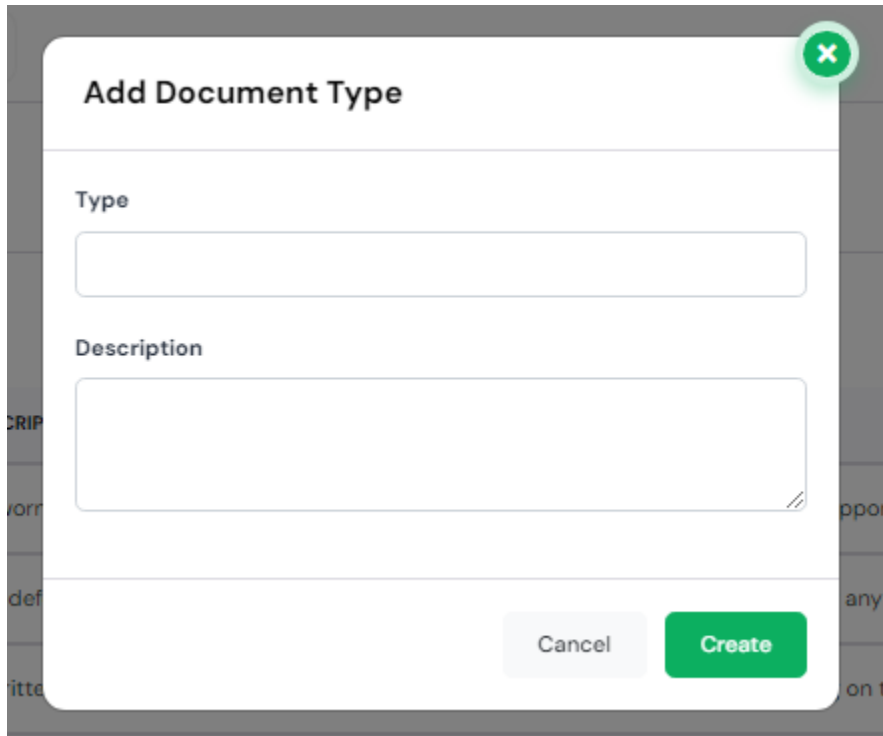
The screenshot shows a modal window titled "Add Deal". At the top right is a green close button with an "X". Below the title is a green button labeled "Generate with AI" with a small icon. The form contains four input fields: "Deal Name", "Price" (containing "0"), "Advocates", and "Phone No". At the bottom right are two buttons: "Close" (grey) and "Create" (green).

- 4.1. **Deal Name:** Allows advocates to specify the name of the deal.
 - 4.2. **Price:** Specifies the price or value of the deal.
 - 4.3. **Advocate:** Specifies the advocate associated with the deal.
 - 4.4. **Phone No. :** Allows advocates to add a phone number related to the deal.
 - 4.5. **Generate with AI:** An option to generate deal details using artificial intelligence.
5. **List View Button**
Adjacent to the create new deal button, advocates can find a button to switch to list view. Clicking on this button changes the view to display a list of existing deals.

Functional Setup – Document Type

1. Create New Document Type Button

This green button located at the top right corner allows users to create a new document type within the system. Clicking on this button will likely open a form where users can enter the details of the new document type as Type and Description.

A screenshot of a web application form titled "Add Document Type". The form is white with a green close button (an 'x' in a circle) in the top right corner. It contains two input fields: "Type" and "Description". The "Type" field is a single-line text box, and the "Description" field is a larger multi-line text box. At the bottom of the form, there are two buttons: a grey "Cancel" button and a green "Create" button. The form is overlaid on a dark grey background that shows some blurred text from the underlying page.

2. Search Bar

Located below the "Create New Document Type" button, this feature allows users to quickly find specific document types or descriptions. Users can type keywords into the search bar to filter their document types or descriptions.

- ## 3. Document Type and Description
- The main area of the page displays a table with two columns: "Type" and "Description". This table provides an overview of various legal document types along with their descriptions, offering insights into their purposes and contexts in legal proceedings. For example, an "Affidavit/Declaration" is described as a "sworn statement of facts made by a party or witness submitted as evidence to support or oppose a motion or other court action".

Functional Setup – Document Type

ORIANATECH Hi, Advocate! Contact Us ENGLISH

Dashboard Staff Cases To-Do Case Diary/Calendar Cause List Timesheet Expense Messenger CRM **Functional Setup** Document Type

Document Type

Dashboard > Document Type [Create New Document Type](#) +

Show 10 entries Search:

TYPE	DESCRIPTION
Affidavit/Declaration	A sworn statement of facts made by a party or witness, submitted as evidence to support or oppose a motion or other court action
Answer/Responsive Pleading	The defendant's response to the complaint, addressing the allegations and asserting any defenses
Appellate Opinion	A written decision issued by an appellate court, providing its legal analysis and ruling on the issues raised in an appeal.
Application for Default Judgment	A document filed when a party fails to respond or appear within the required time, seeking a judgment in favor of the non-defaulting party.
Brief/Memorandum	A written legal argument submitted to the court, presenting the parties' positions and supporting legal authority on a specific issue.
Certificate of Service	A document proving that a copy of a filed document has been properly served on all required parties, in compliance with court rules and procedures.
Complaint/Petition	The initial document filed by the plaintiff to initiate a lawsuit, outlining the claims against the defendant
Discovery Requests and Responses	Documents used during the discovery phase of the litigation process, including requests for documents, interrogatories (written questions), requests for admissions, and responses.

Go to Settings to activate Windows

Functional Setup – Document Sub-Type

The UI for the Document Sub-Type is exactly same to the Document type page UI mentioned on previous page.

1. Create New Document Subtype Button

This green button located at the top right corner allows users to create a new document subtype within the system. Clicking on this button will likely open a form where users can enter the details of the new document subtype.

2. Search Bar

Located below the “Create New Document Subtype” button, this feature allows users to quickly find specific document subtypes or descriptions. Users can type keywords into the search bar to filter their document subtypes or descriptions.

3. Document Subtype and Description

The main area of the page displays a table with two columns: “Subtype” and “Description”. This table provides an overview of various legal document subtypes along with their descriptions, offering insights into their purposes and contexts in legal proceedings.