



**Legarly**  
**Revolutionising Legal**  
**Case Management**

**WHITERIDGE TECHNOLOGIES**

## Executive Summary

In the fast-paced world of legal practice, efficiency, accuracy, and client satisfaction are paramount. Legal professionals are often bogged down by administrative tasks, document management, and workflow inefficiencies, which can detract from their primary focus—delivering exceptional legal services. Legarly is a comprehensive case management system designed to address these challenges head-on. By integrating a suite of powerful modules, Legarly streamlines client, case, document, and workflow management, enabling legal professionals to enhance productivity, reduce administrative burdens, and focus on what truly matters: serving their clients effectively.

This whitepaper provides an in-depth overview of Legarly's modules, highlighting how each component contributes to a seamless and efficient legal practice. Whether you are a new user or an existing one, this guide will help you navigate Legarly with confidence and maximise its potential to transform your legal operations.

## Introduction

### The Challenges Facing Legal Professionals

Legal professionals face a myriad of challenges in their daily operations, including:

- **Client Management:** Keeping track of client information, communications, and case details can be overwhelming.
- **Document Management:** Managing vast amounts of legal documents, ensuring they are organised, accessible, and secure.
- **Workflow Efficiency:** Coordinating tasks, deadlines, and appointments across multiple cases and team members.
- **Financial Management:** Handling client trust accounts, expenses, and invoicing with precision and compliance.
- **Regulatory Compliance:** Ensuring that all operations adhere to legal and ethical standards.

Legarly is designed to address these challenges by providing a centralised platform that integrates all aspects of legal practice management. By leveraging Legarly, legal professionals can streamline their operations, improve efficiency, and deliver better outcomes for their clients.

### Legarly Modules: A Comprehensive Overview

#### 1. Clients (Organisations/Individuals)

The Clients module allows legal professionals to manage all client-related information in one place. Key features include:

- **Client Profiles:** Store and organise client details, including contact information, case history, and communication logs.
- **Client Segmentation:** Categorise clients by type (individual or organisation) for easier management.
- **Communication Tracking:** Record all client interactions, ensuring that no detail is overlooked.

## 2. Accounts (Client Trust)

The Accounts module is designed to manage client trust accounts with precision and compliance. Key features include:

- **Trust Account Management:** Track client funds, ensuring compliance with legal and ethical standards.
- **Transaction Records:** Maintain detailed records of all transactions, including deposits, withdrawals, and transfers.
- **Reconciliation:** Easily reconcile trust accounts with bank statements to ensure accuracy.

## 3. Expenses

The Expenses module simplifies the tracking and management of case-related expenses. Key features include:

- **Expense Tracking:** Record and categorise expenses for each case, ensuring accurate billing and reimbursement.
- **Receipt Management:** Attach receipts and supporting documents to expense records for easy reference.
- **Expense Reporting:** Generate detailed expense reports for clients or internal review.

## 4. Matters

The Matters module is the core of Legarly's case management capabilities. Key features include:

- **Case Management:** Create and manage case files, including case details, parties involved, and key dates.
- **Task Assignment:** Assign tasks to team members, ensuring that all case-related activities are tracked and completed on time.

- **Deadline Tracking:** Set and monitor deadlines for case milestones, court dates, and other important events.

## 5. Invoices

The Invoices module streamlines the billing process, ensuring accurate and timely invoicing. Key features include:

- **Invoice Creation:** Generate detailed invoices based on billable hours, expenses, and other charges.
- **Customisable Templates:** Create and save invoice templates for different types of cases or clients.
- **Payment Tracking:** Track invoice payments and outstanding balances, ensuring timely collection.

## 6. Notes

The Notes module allows legal professionals to capture and organise important case-related information. Key features include:

- **Case Notes:** Record detailed notes for each case, including client meetings, court appearances, and legal research.
- **Collaboration:** Share notes with team members, ensuring that everyone is on the same page.
- **Search Functionality:** Easily search and retrieve notes using keywords or filters.

## 7. Tasks

The Tasks module helps legal professionals manage their workload and stay on top of deadlines. Key features include:

- **Task Creation:** Create and assign tasks to team members, with due dates and priority levels.
- **Task Tracking:** Monitor the progress of tasks, ensuring that they are completed on time.

- **Reminders:** Set reminders for upcoming tasks and deadlines, reducing the risk of missed deadlines.

## 8. Documents

The Documents module provides a secure and organised 50GB repository for all case-related documents. Key features include:

- **Document Storage:** Store and organise documents by case, client, or category.
- **Version Control:** Track document versions, ensuring that the most up-to-date information is always available.
- **Document Sharing:** Share documents with clients or team members securely, with access controls in place.

## 9. Cause Lists

The Cause Lists module helps legal professionals manage court schedules and appearances. Key features include:

- **Court Schedule Management:** Track court dates, hearings, and other important events.
- **Case Prioritisation:** Prioritise cases based on court schedules and deadlines.
- **Calendar Integration:** Sync cause lists with your calendar for easy reference.

## 10. Appointments

The Appointments module simplifies the scheduling and management of client meetings, court appearances, and other events. Key features include:

- **Appointment Scheduling:** Schedule appointments with clients, opposing counsel, or other parties.
- **Reminders:** Set reminders for upcoming appointments, reducing the risk of no-shows.

## 11. Reports

The Reports module provides powerful reporting capabilities, enabling legal professionals to analyse their practice's performance. Key features include:

- **Customisable Reports:** Generate reports on case progress, financial performance, and more.
- **Data Visualisation:** Use charts and graphs to visualise data, making it easier to identify trends and insights.
- **Export Options:** Export reports in various formats, including PDF and Excel, for easy sharing and analysis.

## 12. AI Assistant

The AI Assistant module leverages artificial intelligence to enhance productivity and decision-making. Key features include:

- **Legal Research:** Use AI to quickly find relevant case law, statutes, and legal precedents.
- **Document Drafting:** Automate the drafting of legal documents, saving time and reducing errors.
- **Predictive Analytics:** Analyse case data to predict outcomes and inform strategy.

## 13. Law Journal

The Law Journal module provides access to a comprehensive library of legal resources.

Key features include:

- **Legal Research:** Access a vast database of case law, statutes, and legal articles.
- **Annotations:** Annotate and highlight important sections of legal texts for easy reference.
- **Collaboration:** Share legal research with team members, ensuring that everyone is informed.

## 14. Conveyancing

The Conveyancing module is tailored for property law professionals, streamlining the conveyancing process. Key features include:

- **Property Management:** Track property details, including ownership, title, and encumbrances.
- **Transaction Tracking:** Monitor the progress of property transactions, from offer to completion.
- **Document Management:** Store and organise all conveyancing-related documents in one place.

## 15. Users

The Users module allows firms to manage user accounts and permissions. Key features include:

- **User Roles:** Define user roles and permissions, ensuring that team members have access to the appropriate modules and data.
- **User Activity Tracking:** Monitor user activity, ensuring accountability and security.
- **Onboarding:** Easily onboard new users with predefined templates and permissions.

## 16. Firm Activity

The Firm Activity module provides a comprehensive overview of all activities within the firm. Key features include:

- **Activity Tracking:** Track all firm activities, including case updates, client interactions, and financial transactions.
- **Audit Trail:** Maintain a detailed audit trail for compliance and accountability.
- **Performance Metrics:** Analyse firm performance metrics, identifying areas for improvement.



## 17. Access Control

The Access Control module ensures that sensitive information is protected. Key features include:

- **Role-Based Access:** Control access to modules and data based on user roles.
- **Data Encryption:** Encrypt sensitive data to protect it from unauthorised access.
- **Audit Logs:** Maintain detailed logs of all access attempts, ensuring accountability.

## 18. License & Billing

The License & Billing module manages software licenses and billing for Legarly. Key features include:

- **License Management:** Track and manage software licenses for all users.
- **Billing Management:** Manage billing and subscription details, ensuring timely payments.
- **Renewal Reminders:** Set reminders for license renewals, ensuring uninterrupted access to Legarly.

## 19. Settings

The Settings module allows users to customise Legarly to meet their specific needs.

Key features include:

- **Customisation:** Customise the interface, workflows, and notifications to suit your practice.
- **Integration:** Integrate Legarly with other software tools, such as email, calendars, and accounting software.
- **Security Settings:** Configure security settings, including password policies and two-factor authentication.

## 20. Notifications

The Notifications module ensures that users stay informed about important updates and deadlines. Key features include:

- **Customisable Notifications:** Set up notifications for case updates, deadlines, and appointments.
- **Multi-Channel Notifications:** Receive notifications via email, SMS, or in-app alerts.
- **Reminders:** Set reminders for upcoming tasks, appointments, and deadlines.

## Conclusion

Legarly is more than just a case management tool; it is a complete solution designed to support legal professionals in every aspect of their practice. By integrating a suite of powerful modules, Legarly streamlines client, case, document, and workflow management, enabling legal professionals to enhance productivity, reduce administrative burdens, and focus on delivering high-quality legal services.

Whether you are a solo practitioner or part of a large firm, Legarly offers the tools and features you need to manage your practice efficiently and effectively. By leveraging Legarly, you can transform your legal operations, improve client satisfaction, and achieve better outcomes for your clients.

## Call to Action!

Ready to revolutionise your legal practice? Discover how Legarly can help you streamline your operations and focus on what matters most—serving your clients effectively. Contact us today to schedule a demo and see Legarly in action.

## About Legarly

Legarly is a leading provider of legal case management software, designed to help legal professionals streamline their operations and deliver exceptional client service. With a



suite of powerful modules, Legarly offers a complete solution for client, case, document, and workflow management. Learn more at [www.legarly.com](http://www.legarly.com).

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