StartERP
AI BUSINESS OS

MODULE GUIDE 12 OF 14

Law firms

Matters and case files, conflict checks, hourly billing, hearings, client trust money and legal templates. Step-by-step instructions for each of the 6 modules, with the real screens you will use.

Matters & case files | Conflict check | Time tracking & hourly billing | Hearings & deadlines calendar | Retainers & client trust money | Legal templates

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How to use this guide

Each chapter covers one module: what it does, how to start in a few steps, and then each of its screens with the steps to follow. The label under each module name says whether every store has it or whether it is an add-on module switched on for your store. Some modules are made for certain kinds of business or for one country, and the label says which.

Where to find what your store has. Open **Settings** → **Modules** to see the modules your store has. Every screen has a **?** button at the top with the steps for that screen, and the ⓘ beside a title explains what the screen shows.

About the screenshots. They come from StartERP demo stores (starterp.org/#/demo-store), each taken in the kind of business the module is made for, so the names and figures are sample data. Your screens show your own company, products and figures, and some words change to suit your business.

The modules in this guide

Module	What it gives you
Matters & case files Add-on	One file per case or piece of work: the client, the court and case number, the opposing parties, the lawyer, the fee arrangement and the stage from intake to closing
Conflict check Add-on	Before you take a client, search every matter, opposing party, witness and customer by name or ID, and keep the result and the decision on the matter
Time tracking & hourly billing Add-on	Log the hours of each lawyer on a matter with a timer, then bill the unbilled hours in one invoice
Hearings & deadlines calendar Add-on	Every hearing, filing and deadline of every matter in one calendar, with a reminder days before and the outcome kept
Retainers & client trust money Add-on	Keep each client's advance apart from the firm's money: deposits, court fees paid out, refunds and invoices paid from it, each posted to its own trust account, with an alert when a matter runs low

Legal templates Add-on	Engagement letters, powers of attorney, legal notices and fee agreements in English and Arabic, filled from the matter and the client in one click, then edited and printed

01

Matters & case files

Add-on module | For: Law firm & legal services

Every case in one file, from intake to closing

Open a matter for each case or piece of work with its client, the opposing parties, the court and case number, the responsible lawyer and the fee arrangement, and move it through its stages from intake to closing. Its hearings, time and client money sit on the same matter, so everyone in the firm sees where it stands.

What you get

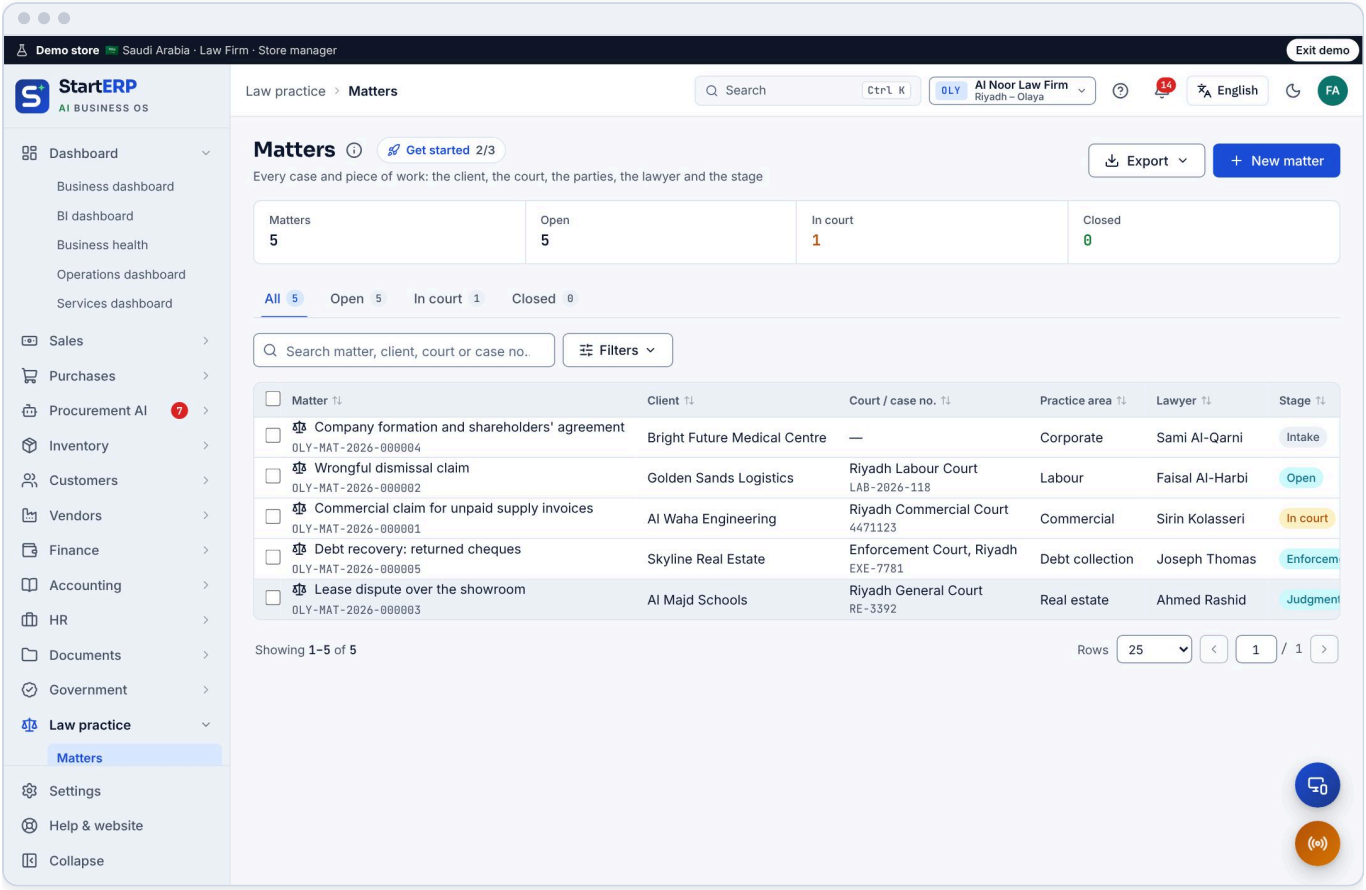
- Client, parties, court, case number and lawyer on every matter
- Hearings, time and client money linked to the matter
- The stage of every matter, from intake to closing
- The fee arrangement agreed for each matter

GET STARTED IN 3 STEPS

1. **Add the client.** Or pick an existing one.
2. **Open a matter.** Parties, court, lawyer and fees.
3. **Move it through stages.** From intake to closing.

Matters

One file per case or piece of work of a law firm: the client, the practice area, the court and case number, the opposing parties and related persons, the responsible lawyer, the fee arrangement and the stage from intake to closing. The file also holds its conflict check, its time and its hearings. Part of the Matters & case files add-on, sold to law firms.



Matters · demo store: Law Firm

ON THE LIST

1. Open Law practice → Matters. Each row shows the matter and its number, the client, the court and case number, the practice area, the lawyer and the stage.
2. Use the Open, In court and Closed tabs; filter by practice area, stage or lawyer; search a matter, client, court or case number.
3. Press "New matter" to open a file.

ON THE FORM

1. Write the title, pick the client (a customer), the practice area, the stage and the responsible lawyer, then the court, the case number and the opening date.
2. Add the opposing parties (with their ID or CR number and their lawyer) and the related persons such as witnesses, guarantors or heirs: the conflict check searches these names.

3. Choose the fee arrangement (hourly, fixed fee, retainer or success fee), the hourly rate and the agreed fee. Save.

ON THE RECORD

1. Details shows the client (click to open the customer), the court, the case, the parties, the lawyer and the fees, with the conflict check on top when the store has it.
2. The Time tab lists the hours logged on the matter; "Bill unbilled time" puts every unbilled, billable entry on one sales invoice to the client.
3. The Hearings & deadlines tab lists the matter's court dates and deadlines in date order, with their state.

02

Conflict check

Add-on module | For: Law firm & legal services

Check for a conflict before you take the client

Before you take a new client or case, search every matter, opposing party, witness and customer you have recorded by name or ID number. Each hit shows where the name was found, and the result of the check and your decision are kept on the matter as a record that it was done.

What you get

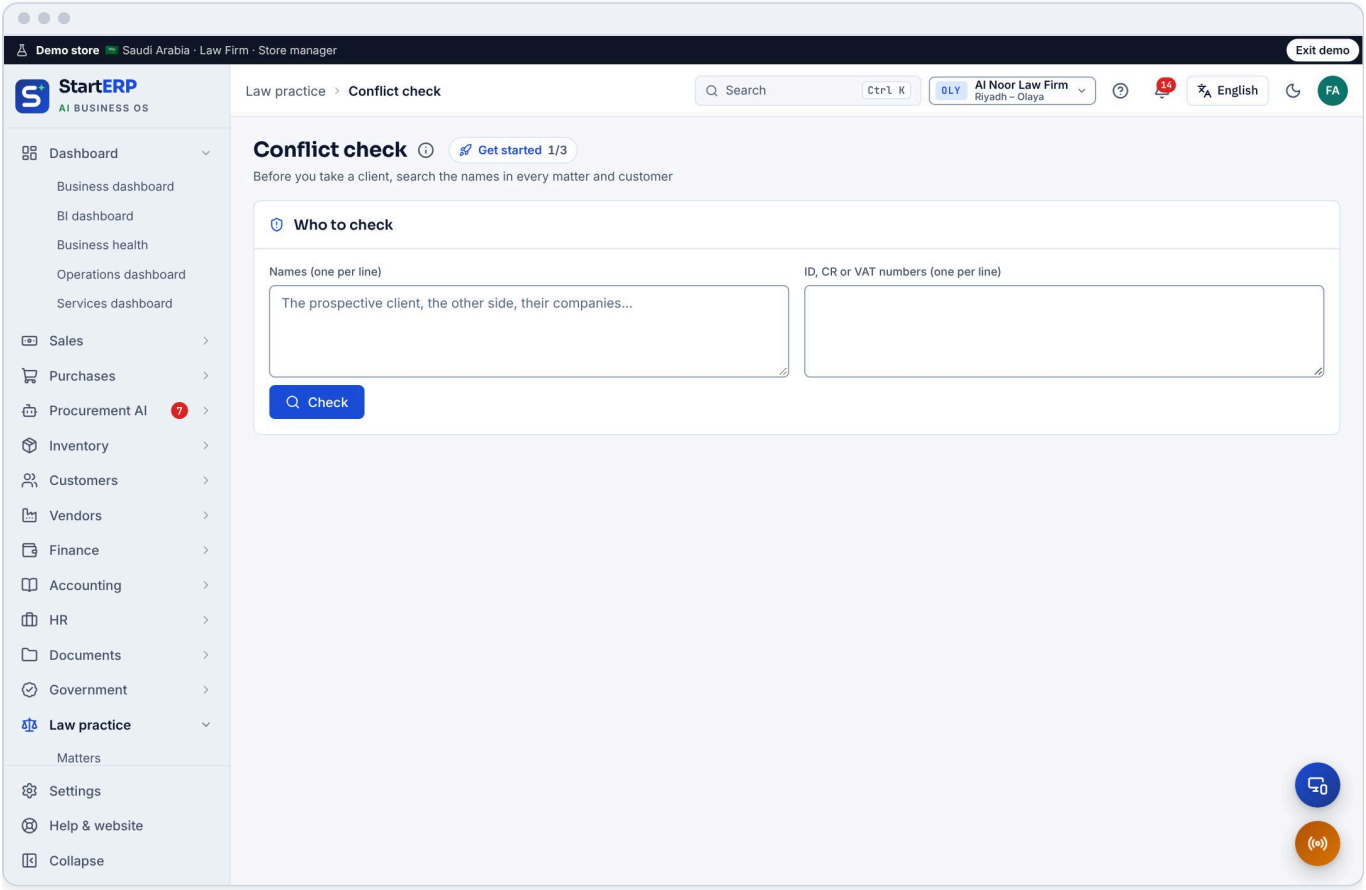
- Searches matters, opposing parties, witnesses and customers
- By name or by ID number
- Each hit shows where the name was found
- The result and the decision kept on the matter

GET STARTED IN 3 STEPS

1. **Search a new name.** Name or ID number of the client or party.
2. **Review the hits.** See where each name was found.
3. **Record the decision.** Kept on the matter as proof.

Conflict check

Before a law firm takes a client or a case, search the names and ID numbers in every matter (its clients, opposing parties and related persons) and every customer. The check of a matter is kept on it with the decision: cleared, waived with the clients' consent, or declined. Part of the Conflict check add-on.



Conflict check · demo store: Law Firm

1. Open Law practice → Conflict check, write the names (one per line) and any ID, CR or VAT numbers, and press Check.
2. Each match shows where it was found: an opposing party (the real conflict, listed first), a client of another matter, a related person or a customer, with the matter it belongs to.
3. On a matter, press "Run conflict check" to check its own client and parties, then "Record decision". Waiving needs a note of the consent on file; declining cancels the matter.

Tips. Names match when every word of the shorter name is in the longer one, so "Gulf Steel" finds "Gulf Steel Company LLC"; company words, accents and Arabic letter forms are left out. A single short word such as "Ali" matches nothing on its own. Checking again after the parties change clears the old decision, so a new decision is recorded for the new check.

03

Time tracking & hourly billing

Add-on module | For: Law firm & legal services

Bill every hour you work

Each lawyer logs the hours worked on a matter with a timer or by hand. The unbilled hours wait on the matter until you bill them in one invoice, so time worked is never forgotten and the client sees what the invoice is for.

What you get

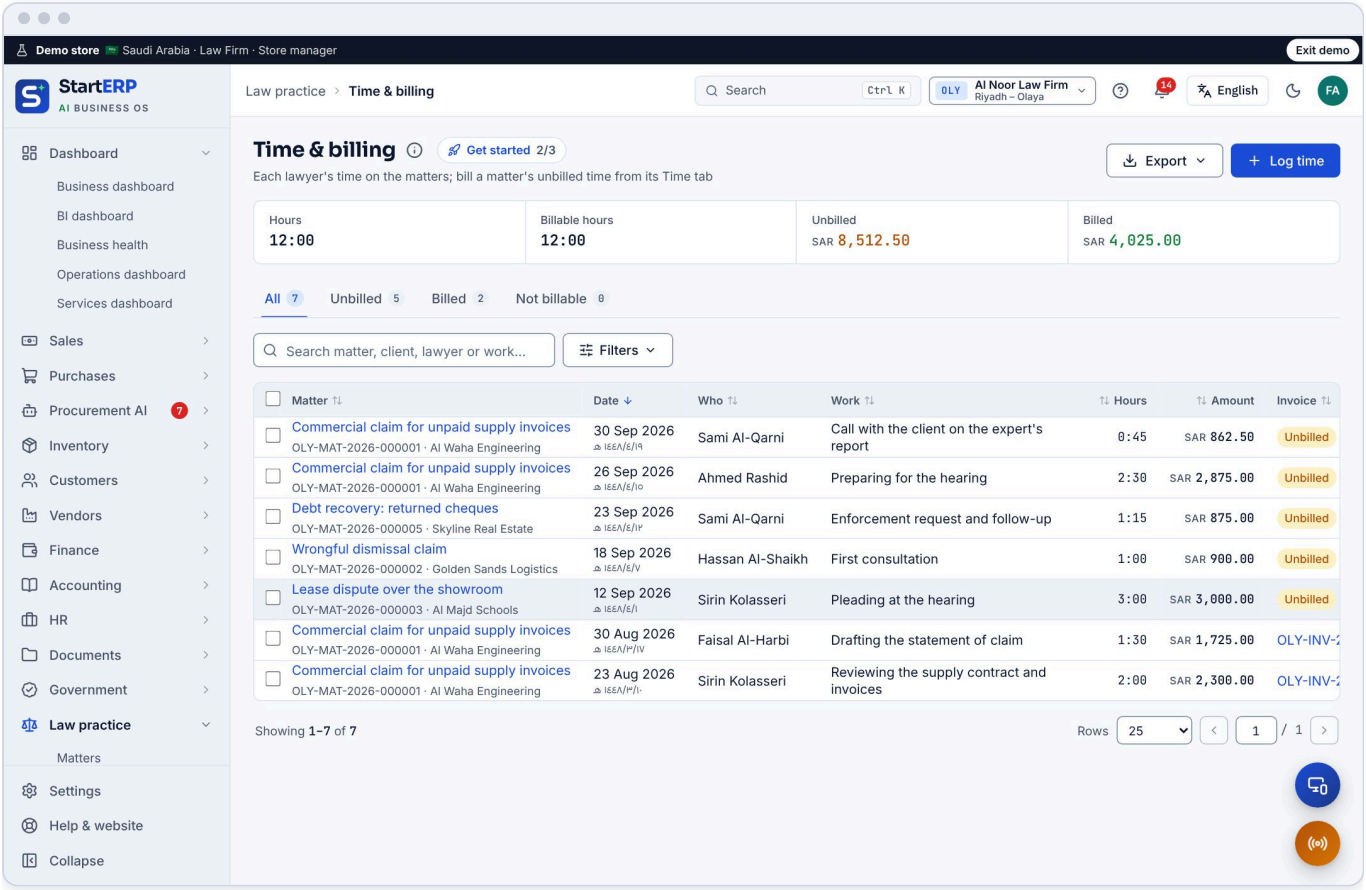
- A timer or manual entries for each lawyer
- Hours logged against the matter
- Unbilled hours billed in one invoice
- Billed and unbilled time kept apart

GET STARTED IN 3 STEPS

1. **Pick a matter.** The case you are working on.
2. **Log your time.** Start a timer or type the hours.
3. **Bill the hours.** Unbilled time goes on one invoice.

Time & billing

Each lawyer's time on the matters, typed in or measured with the timer, at the matter's hourly rate or one of its own, billable or not. The unbilled time of a matter goes on one sales invoice to the client, one line per entry in hours, and the billed entries keep their hours and rate. Part of the Time tracking & hourly billing add-on.



Time & billing · demo store: Law Firm

ON THE LIST

1. Open Law practice → Time & billing. The tiles add up the hours, the billable hours, the unbilled and the billed amounts of the rows shown.
2. Use the Unbilled, Billed and Not billable tabs; filter by who logged the time; the invoice column opens the sale.

ON THE FORM

1. Pick the matter, then either type the minutes or press "Start timer" and, when the work is done, "Stop and fill the time". The timer keeps running if you leave the page.
2. The rate starts at the matter's hourly rate; untick Billable for time the client does not pay. Describe the work: it is printed on the invoice line.

04

Hearings & deadlines calendar

Add-on module | For: Law firm & legal services

Never miss a hearing or a filing deadline

Every hearing, filing and deadline of every matter sits in one calendar, with a reminder days before so the lawyer is ready. After the hearing, its outcome is kept on the matter, so the next step is never lost.

What you get

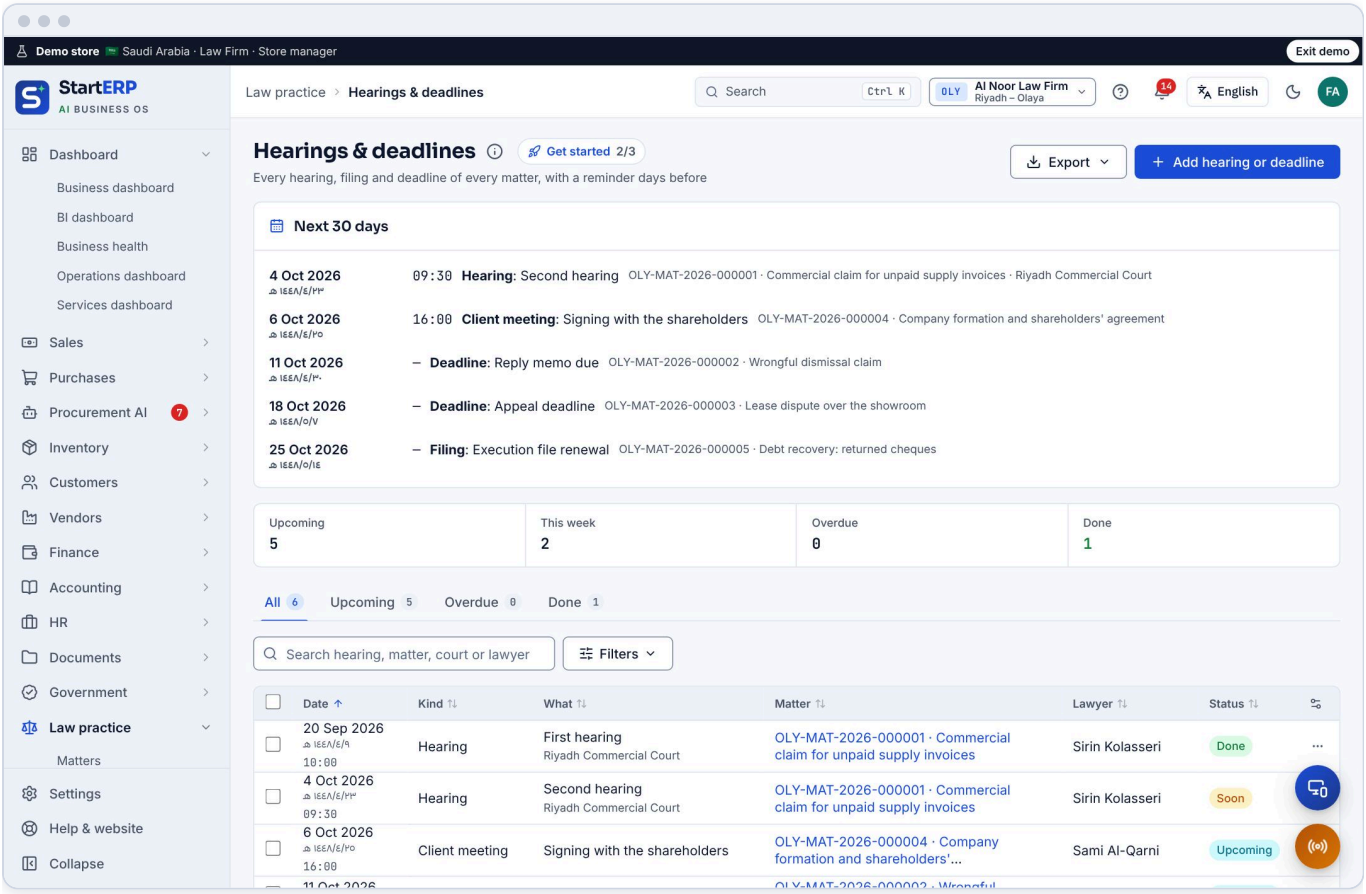
- Hearings, filings and deadlines of every matter
- One calendar for the whole firm
- A reminder days before
- The outcome of each hearing kept

GET STARTED IN 3 STEPS

1. **Open a matter.** Hearings belong to a matter.
2. **Add a hearing or deadline.** With a reminder days before.
3. **Record the outcome.** So the next step is never lost.

Hearings & deadlines

Every hearing, filing, deadline and client meeting of every matter in one calendar, with the court, the lawyer attending and the outcome. A reminder comes under the bell, and by email when it is switched on, the set number of days before. Part of the Hearings & deadlines calendar add-on.



Hearings & deadlines · demo store: Law Firm

ON THE LIST

1. Open Law practice → Hearings & deadlines. The top card lists the next 30 days by day; the list below holds every event with its state: Today, Soon (within its reminder days), Upcoming, Overdue or Done.
2. Press "Add hearing or deadline", or add one from the matter's Hearings & deadlines tab: the court and the lawyer fill in from the matter.

ON THE FORM

1. Pick the matter and the kind (hearing, deadline, client meeting or filing), the date and time, the court or place and the lawyer attending.
2. Set how many days before to remind (2 by default, 0 to 30). After the hearing, tick Done and write the outcome, for example the next date it was adjourned to.

05

Retainers & client trust money

Add-on module | For: Law firm & legal services

Client money kept apart and accounted for

Keep each client's advance apart from the firm's money: deposits, court fees paid out, refunds and invoices paid from it are recorded on the matter and posted to their own trust account. Every client's balance is known at any time, and you are alerted when a matter runs low.

What you get

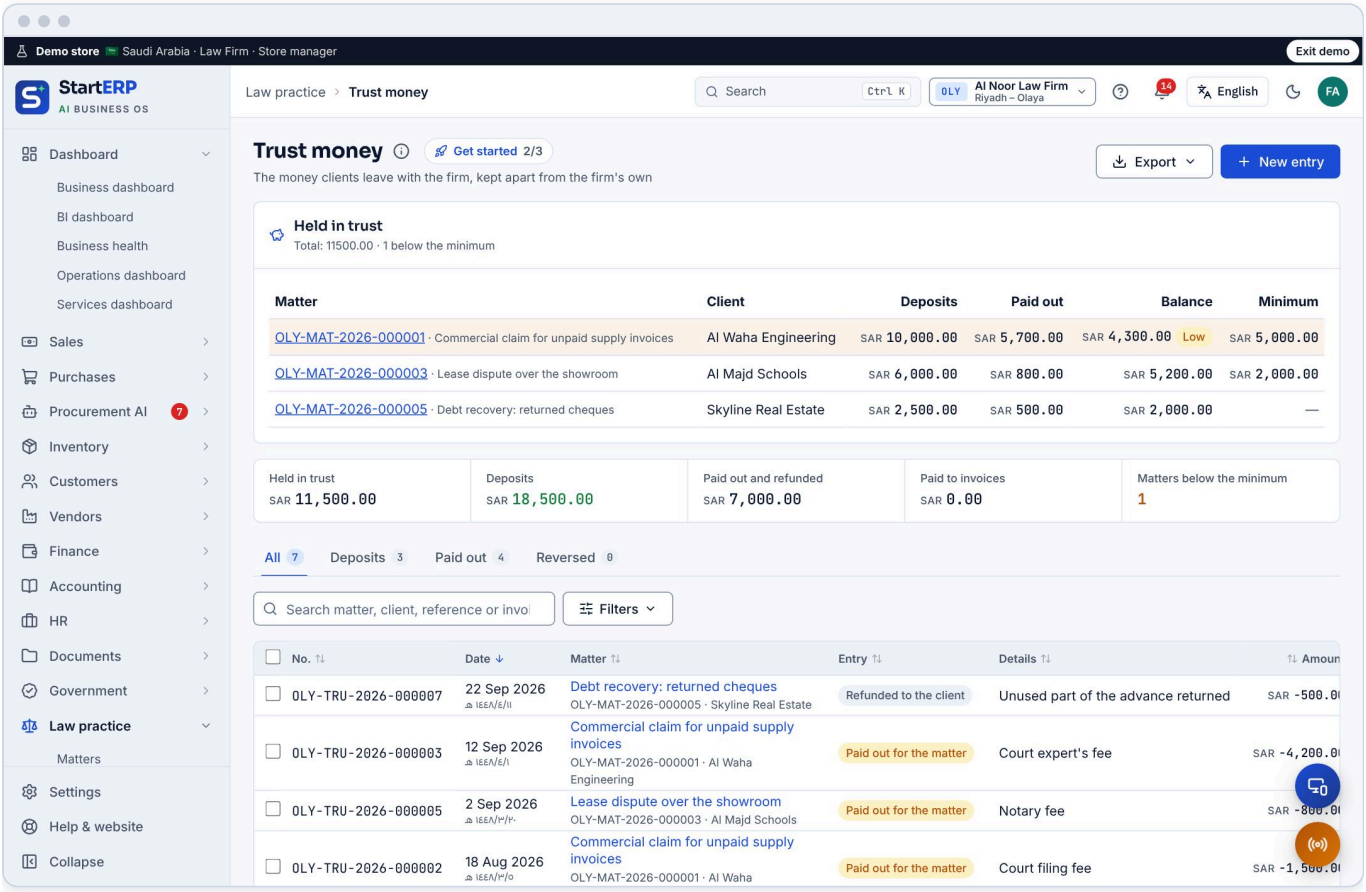
- Deposits, court fees paid out and refunds per matter
- Invoices paid from the client's advance
- Posted to its own trust account in the books
- An alert when a matter runs low

GET STARTED IN 3 STEPS

1. **Pick the matter.** Trust money sits on a matter.
2. **Record a deposit.** The client's advance.
3. **Pay out and check balances.** Court fees, refunds and invoices.

Trust money

The money a client leaves with the firm for a matter, kept apart from the firm's own in the Client trust money account (a liability: the money is the client's). A deposit comes in by cash or bank, court and expert fees are paid out of it, what is left is refunded, and the firm's own invoice can be paid from it. Each entry posts to the ledger, and an alert comes when a matter falls below its minimum. Part of the Retainers & client trust money add-on.



Trust money · demo store: Law Firm

ON THE LIST

1. Open Law practice → Trust money. The top card shows what each matter holds, the low ones flagged; the tiles add up the money held, the deposits, what was paid out and what paid invoices.
2. Press "New entry", or Deposit, Pay out or Pay an invoice on the matter's Trust money tab. Open an entry to see it, and Reverse it if it was wrong.

ON THE FORM

1. Pick the matter and the entry: a deposit from the client, a payment out for the matter, a refund to the client, or paying an invoice. Enter the amount, the date and how the money moved (cash or a bank method), with the transfer or cheque number as the reference.
2. To pay an invoice, pick one of the client's invoices: it gets a payment from the trust account for at most what it still owes and what the matter holds. Nothing more than the matter holds can go out.

06

Legal templates

Add-on module | For: Law firm & legal services

Contracts and letters drafted in minutes

Keep your engagement letters, powers of attorney, legal notices and fee agreements as templates in English and Arabic. Pick a matter and the client, parties, court and dates fill in with one click; edit what you need, then print the finished document.

What you get

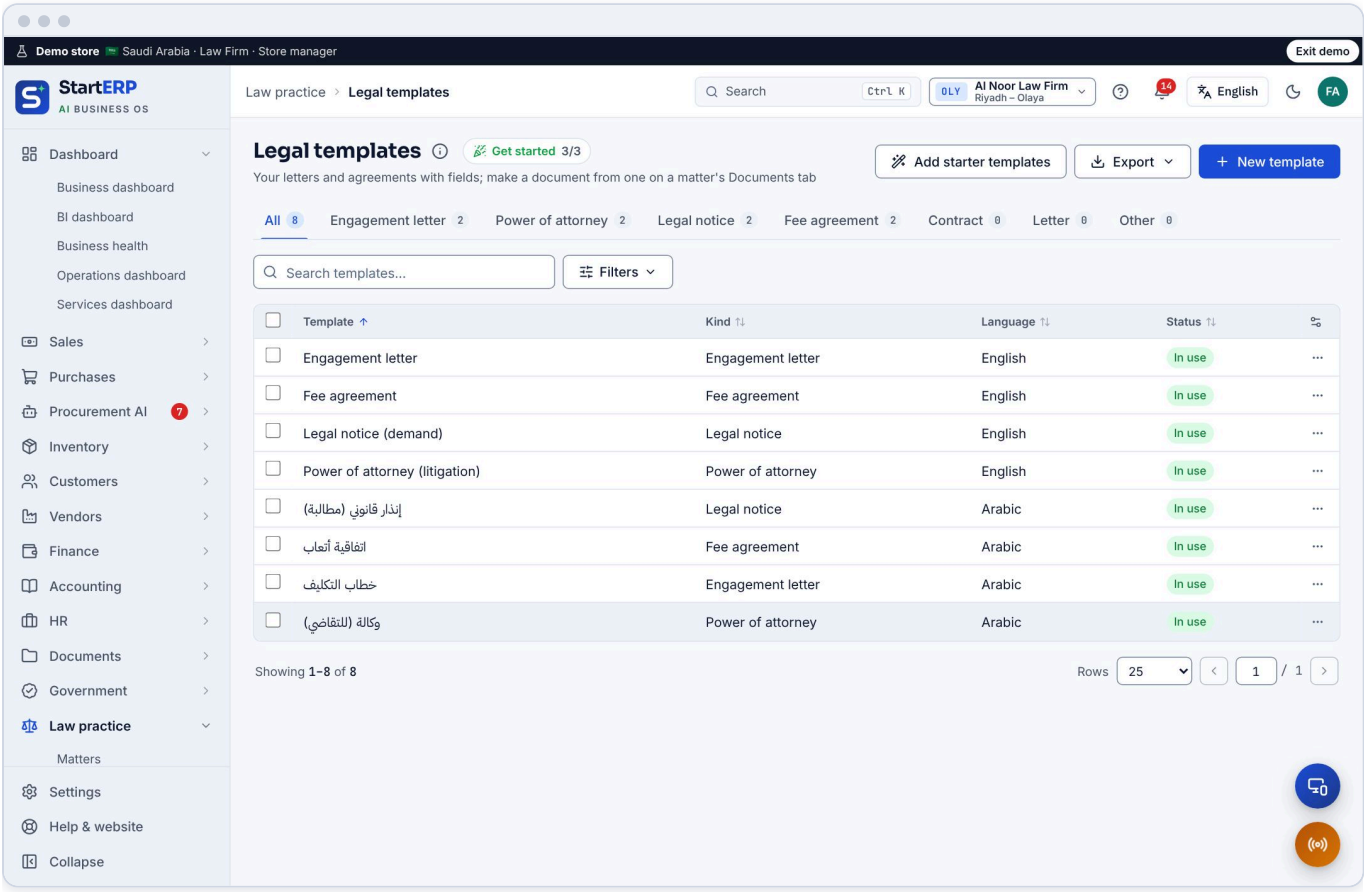
- Your own templates in English and Arabic
- Client, parties, court and dates filled from the matter
- Edit and print the finished document
- Engagement letters, powers of attorney, notices and fee agreements

GET STARTED IN 3 STEPS

1. **Add a template.** Engagement letter, power of attorney, notice.
2. **Pick a matter.** Parties and dates fill in.
3. **Print the document.** Edit what you need, then print.

Legal templates

Your firm's engagement letters, powers of attorney, legal notices, fee agreements and other documents, written once with fields such as {{client.name}} and {{matter.court}}. On a matter, a template becomes a document filled with the matter's, the client's and the firm's details, which you can edit and print. Ready-made starter templates in English, and in Arabic where Arabic is spoken, are one click away. Part of the Legal templates add-on.



Legal templates · demo store: Law Firm

ON THE LIST

1. Open Law practice → Legal templates. Press "Add starter templates" for an engagement letter, a power of attorney, a legal notice and a fee agreement, then read them and change the wording to match your firm.
2. On a matter, open the Documents tab, pick a template and press "Make document". The document opens filled in; Edit changes its text, Print prints it.

ON THE FORM

1. Name the template and choose its kind and language: the language decides how the fields are filled (the practice area and the list of opposing parties in Arabic or English).
2. Write the text and press a field under it to insert it where the cursor is. A field with nothing to fill prints as a line to write on by hand; a field the app does not know is refused.

Set-up, help and training

The StartERP team sets up your store, imports your products, customers and opening balances from Excel or CSV, and trains your users on the screens they use.

> **Need an add-on module?** Ask your StartERP contact to switch it on for your store, or write to **sirin@starterp.org** or WhatsApp **+966 50 197 1075**.

The full set of module guides

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1	The basics every store has
2	Selling and documents
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5	Purchasing and inventory
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12	**Law firms (this guide)**
13	Hotels and resorts
14	Real estate agencies

All guides can be downloaded in StartERP under Help → User guides.



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