CaseRoom

CaseRoom
LEGAL SYSTEM

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About Us

CaseRoom seeks to shape the South African legal fraternity as a disruptor in office management, archives, and management. Through our understanding of the legal fraternity and behavior across the value chain and platforms, we will empower our clients with the digital tools to better manage their office through a centralized system to store, archive, retrieve and monitor all case data. As an entrepreneurial start, CaseRoom is a South African company and a subsidiary of iMajor Solution owned and founded by **Motlatso Ramatshekgisa**. The company was founded in 2020 and has its office in Hatfield, Pretoria, and is **100 % black owned.**

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What we Do

CaseRoom is a technological tool that enables clients to store, archive, monitor, coordinate and plan office management activities from litigation to courtroom and hearings. We are an office management solution for law firms, advocates, judges, and medical professionals by offering them effective modern case management solutions. The company is a cloud-based legal case management software that can be accessed from anywhere using a smart device such as a laptop, phone, or tablet that has an internet connection. With the world requiring legal practitioners to work on the go, **CaseRoom** offers quick access to cases, diaries, calendars, and relevant information at a convenient time and place. CaseRoom provides an unparalleled degree of quality that helps in the effective control of case management.

CaseRoom is holistic software designed to help lawyers, and medical practitioners effectively manage daily operations and improve business processes. The system was built by a legal professional with more than 10 years of experience in the legal industry and a tech professional with expertise in software and application development. This makes **CaseRoom** a relevant company that understands the needs of clients that want to have better case management.

Our Vision

CaseRoom seeks to be a game changer and authority in modern legal office management. We want to be known as a credible service, technology-driven, and sustainable legal company that prioritizes client satisfaction.

Our Mission

Being the architect of change in the nature of archives and management of the legal office environment through harnessing the power of technology.

Our Services

CaseRoom is a one-stop shop for digital legal office management. The ecosystems of the legal firm office management – from case management, task management, document management, invoice, billing, and diary management need integration into a digital system. **CaseRoom** is designed to ensure that companies in the legal fraternity from the law firm, agencies, advocates, etc. integrate their office management into the digital environment.

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Task Management and reminders

Legal firms require task management to run offices efficiently, our software provides instant task tool according to a level of priority and assist in the monitoring of the progress. The software is designed to save time, and avoid tedious jobs and manual action. The system is automated, set a reminder on tasks, and ensures that critical steps in task management are not missed.

Diary

Diary Calendar shows upcoming important dates from Consultation Dates, Pre-trial Dates, Trial Dates, Medico-Legal Appointments Dates, and Many Others. This diary helps create a light digital display that can be accessed via mobile and portable devices. The digital diary will also assist in managing time and indicating to users the amount of time available between meetings. The users will be able to edit entries, read entries, and write additional notes. The software will be user-friendly, accessible, and flexible

Event Scheduling for Lawyers

This software will be customized to cater for a task that is present in legal and related industries. It will allow users to plan events, set up appointments, set email reminders, and built-in calendar linked to Google Calendar, Microsoft Calendar, and others.

The Software will have the functionality to share amongst team members and clients. This will help clients with the efficiency of running the offices

Cloud Storage

This online storage facility will store and archive the firm's data safely. The clients will have their offices in their hands through the cloud storage that is accessible online. This software will come with a cloud-based law office base archive as part of the package. The software will automatically synchronize the data between all computers, mobile phones and tablets. The software will update automatically.

Document management

Law firms and related businesses generally have thousands of pages. This document management software will save documents and files online. Users will have the ability to edit, save, and arrange their files online. This software will optimize the firm's ability to organize documents and will provide a competitive advantage over others.

The document will be stored in a matter-centric, which allows the firm to link cases, contacts, categories, and proper labeling for each file.

Medico-Legal Appointments

Experts are booked to assess clients using this application and they are all invited to access medical records and other evidence documents. This app will ensure that appointments are timed, and run efficiently. The legal representative and medical practitioner will have a synchronized to attend to clients properly.

Accounts

As key aspects of the law firm, invoicing and billing are the driver of the success of a firm. The software helps the do transaction online, and manage, track and store documents online. The software will have a high level of encryption to protect users' information. The software will be accessible on a mobile device which will assist in efficient time tracking. The platform will have the ability to disburse invoices and capture payments in the systems.

SMS Notification

Notify clients and role players about each and everything happening on a matter. The SMS notification will include empowering the client's client with legal information and access to resources.

Exporting and Importing

The software will have the ability to import and export documents and files in different formats. The software will process and encrypt case files and reports that are imported and exported to clients. This will ensure that client's data is protected and secured.

Client Portal

The users will have the portion in the software to log in and their cases inter alia notes, messages, invoices, make payments, a summary of their cases, download and upload documents, preview documents, and ask questions. The client will have the ability to transact on the portal and make notes where necessary.

Human resource management

The systems will assist the firm manage human resource management areas electronically, such as payroll management, recruitment management, training management, performance management, policy, leave application, time management, and others.

Workflow Management

The application is designed to direct all your staff as to what follows after what making it easier to finalize matters. After completion of each task, the application will indicate what needs to be done.

Notes Management

Record all notes from phone calls, typing, making copies, sending emails etc.

Masters (Automatic Templates)

Auto-populate letters, notices, applications, pleadings, bills, etc based on the information captured on a case.

Office Integration

Edit all the master's templates documents using Microsoft Office. The integration software and App will have task master incorporates such as having a tool to check if the tasks are completed. This will include functionalities such as a calendar, automated reminders, and event planner.

Emails integration

Send and receive emails from the application by setting up your email configuration.

Reports

You can generate a summary of variety of reports on cases and matters. The software is also important for billing and accounting software. The software will also synthesize data and generate reports that provide firms with management.

Demo

The demo version is also available for potential clients to test the software/Application to see how it can assist their companies.

Case and Contact Management

Leveraging modern technology – this tool will organize efficiently and effectively the large files, reports, and large information that is normally associated with law firms. The tool will be customized for law firms, attorneys, courtrooms, advocates, and medico-legal professionals to use in case of management which includes integration and links with billing management, case notes, tracking, and court management. The system eliminates manual archives, storage, and monitoring of cases. It saves clients time and encourages efficiency.

Mobile App (iOS, IPhone, Android)

The Applications (apps) will help the firm manage ongoing cases, and hearings, manage schedules, collect data, and store data for current and past cases. The App will be available anywhere at any time on the client's mobile devices. The App will be as comprehensive as possible to serve as an office in your hand. The App will have the ability to send a notification to clients on outstanding matters, upcoming events, etc.

Financial and Activities Reporting

The tool will gather data and be able to provide insights on accounts receivables, funds, invoices, and general company revenue. The system will monitor financial traction including bills, track invoices, expenses, statements, reports, and analysis. The tool will help clients measure their financial goals through budgeting and reporting.

Time and Expense Tracking

This software provides clients with the ability to monitor employees' work progress against the set time. The tool comes in handy especially when doing projects because it will be able to measure the cost associated with a project against labor done. The tool will streamline invoices, improve accuracy and reduce unnecessary costs through time keeping and enhanced expense tracking systems

Digital Invoicing

Digital invoicing or e-invoicing will be used by clients, customers, and suppliers. The e-invoice will be branded and personalized to reflect the firm logo and will be sent to clients and suppliers through a digital portal. The tool will be used to present and monitor transactional documents between clients and customers including purchase orders, debit or credit cards, payment instructions, etc. This will be part of the accounting and bookkeeping system for firms.

Hourly, Flat Rate and Contingency Billing

The systems will have the integrated format of hourly, flat rate and contingency billing system. Depending on client's preference of the rates, the system will cater for every aspects using the legalised standards when billing. For the fees that are unrelated to legal services provided, will be covered separately.
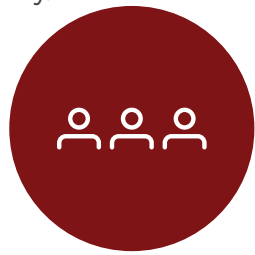
Trust Account Management

The tool will be based on high performance, web-based interconnectivity, and trustworthy cutting-edge technology. Modern law firms, insurance agents, and financial institutions need effective trust account management tools to manage trust accounts with clients. The software will have high encryptions to protect the information, and authentication and access will be recorded all the time to minimize illegal access to the account. The tool will have the ability to manage the list of clients for disbursement, receipts, and multiple trust accounts and bank accounts. This tool will assist in analyzing trust account specification more on conflicts, generate financial reports and ensure there is full compliance with legislative requirement,

Accounting Software Integration

Legal accounting software integration help client manage administration work effectively. The tool is good for creating invoices and quotations for clients and tracking billable time quickly. The software will help clients comply with tax authorities through accounting calculations and reminders where time is due. The software will help in paying service providers and employees with the integrated payroll. The tool can also calculate how much profit the firm generates from each client. It will manage cash flow and integrate bookkeepers' and accountants work in real-time

Credit and Debit Card Payments

The system will allow for payment of services rendered using credit and debit card facilities mainly due to convenience and timeliness. Modern clients are accustomed to and comfortable using credit and debit cards. The advantage of credit and debit cards is also that they can be used by national and international clients. In case of large amounts, the cards will require authentication from the owner, this help is preventing fraud. The system will have sophisticated encryptions to prevent digital fraud.

Automated Bill Reminders

The system will be designed to promptly send out SMS, instant messenger Apps, E-mail of bills and invoices reminders to clients to get paid in time. The system will be an automated reminder to clients that have delays in making scheduled payments. The system will be easy to use- and users can create a reminder and send notification

Court Calendaring Rules (Jurisdictions)

The court-calendaring rule will be integrated with an online calendar for better management of the office. The tool will assist the company to better administer, reduce legal malpractice, and be updated with court information. The court rule calendar will feature court rules and statutory deadlines that are applied to South African legislations.

Access to Apps

The software package will include several apps that will be accessible via different mode Apple Store, Google Play, and App Gallery. The Apps from CaseRoom will be easy to use and synchronized with other Apps and integrated with the software as a whole. The Apps will include functionalities like notifications, reminders, insight, and reporting.

Co-Counsel Portal

The software and the app will have a variety of tools that will allow the Co-Counsel to work on the same case. The features will have tools such as text messages, calendar notifications, and reminders. The portal will have the ability for the Co-Counsel to view documents, download and upload files/folders, commenting on files as folders.

Originating Attorney Reporting

The tool will automatically generate a report through known standard originating attorneys when they are assigned to a matter. The software will calculate the amount of revenue brought by attorney/s, this will save time and administrative work.

Online Client Intake Forms

The software will cater to clients to fill in the information through user-friendly online client intake forms. The form will reduce accidents caused by human errors, cut costs, protect clients' information and save time for clients' employees. The form is secure and safe to use with the information of the client protected.

Online Appointment Booking

The tool will assist clients to save time and make online appointment bookings using the system and Apps. The web-based and mobile apps will be available 24 hours, the notification of the request for an appointment will be instant and the end user can reply. The portal will have the option to pre-schedule, reschedule and cancel an appointment at any time. The system will send automated emails and SMS reminding firms and clients about the appointment. The tool will have the ability to share appointments on other online platforms such as WhatsApp, Facebook, or my Google page.

Priority Live Chat, Phone, and Email Support

This software will have an instance chat access that is focused customer-centric. Modern firms prefer LiveChat tool because they are efficient and are very cost effective. The LiveChat have proven to produce high level satisfaction from customers than any other communication channel. The LiveChat also assist client in measuring traffic on the website, which indicate the location of users, number of visits, unique visits numbers and will assist the company in future marketing.

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