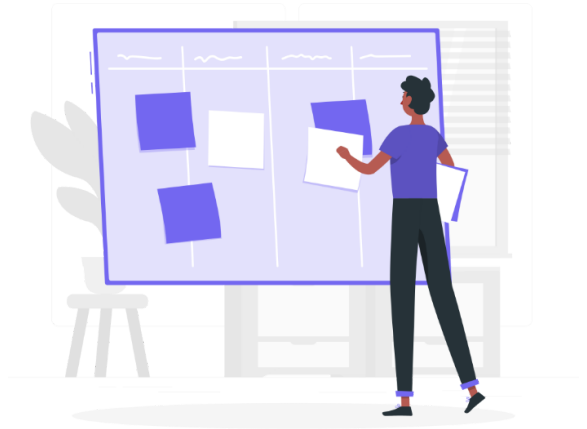# Features

The only cloud-based digital attorney platform you need for your immigration needs. All features of LawTrax are integrated so that you don't have to switch between multiple applications.

Case Management

LawTrax Case Management is a workflow-based platform segregated into multiple stages based on the case type. It enables end-to-end management, tracking, assigning, and notifying the right stakeholders.

Every stage is developed with business rules to ensure that all required documents are captured, verified, and reviewed by the attorney. The platform will alert you to any missing documents before the completion stage. At any stage, the attorney or the designated paralegal team working on a specific case stage can update comments and assign them to the company or beneficiary, as applicable. The inbuilt notification engine will notify the respective stakeholders with complete details in real-time. The sequential completion of the stages will enable the document generation stage using the most recent USCIS templates for attorney verification. At this stage, the attorney reviews the generated documents with complete automation and submits them to USCIS.

Customer Management

Managing customers and interactions at every case stage to gather required documentation is vital for case management. This is where the LawTrax digital platform robustly enables customer and beneficiary data management. An exclusive secure cloud portal equips customers to manage company information and initiate cases for beneficiaries with a single click. The entire case initiation process, from attorney assignment to completion, is automated and based on data provided by the customer (company/individual).

Lead Management

While you save time and effort attending to your existing clients, we also allow you to focus on acquiring new ones. After all, the time saved can be put to better use through prospecting. The lead management feature is a built-in CRM that helps you convert prospects into customers. The LawTrax platform simplifies the process of generating leads and tracking them until conversion. Business rules will alert you and ensure that all respective legal documents are captured from leads before converting them into customers. The platform enables attorneys to categorize leads as potential or hot leads, allowing you to assign a dedicated team for further tracking and closure.

Document Management

LawTrax has a robust document management system built in to help securely manage all client documents. Documents and templates are part of this feature, which helps reduce files being spread across your network and occupying hard disk space in your office. We know it can get messy, so we have a cloud-based, easily indexable, and searchable document management system that you can use. Document management is divided into three stages: document identification, document generation, and document delivery needed for the case. Business rules can be configured and embedded in their respective case stages. Documents as per visa type will be generated and can be merged into a single PDF. All documents from respective stakeholders representing each case type can be uploaded, edited, assigned, and deleted with a complete audit trail.

LawTrax Security

LawTrax servers have built-in cloud security. Every client will have their own instance; databases are encrypted when data is in transit as well as at rest. There's no way that your client's data is visible to anyone else. All files, messages, events, and related data are stored safely and securely using the latest security and encryption technologies.

Data Privacy

We adhere to all data privacy laws, including the California Consumer Privacy Act (CCPA) and PCI compliance. We have implemented digital tokens to authenticate and authorize user access as well as APIs across the platform.

Identity Access Management

The LawTrax platform offers a single sign-on feature that allows users with different roles to seamlessly access data. Role-based access can be created for users within this feature to ensure access is granted to the right resources. The ability to assign users to designated groups makes collaboration easier.
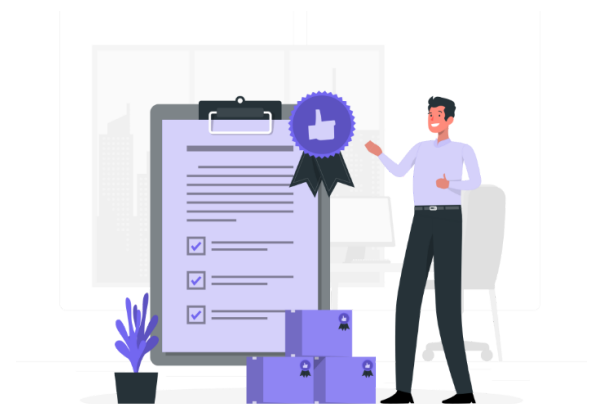
Integration

We are working on useful integrations that you can use with your day-to-day applications:

- Integrate with Outlook to receive alerts for meetings, appointments, court dates, case alerts, etc.

- Integrate with QuickBooks Billing System.

- Webhooks and RESTful APIs for third-party integrations.

Dashboard Reporting

LawTrax dashboards are business-driven with statuses of all cases in real-time. All stakeholders can take action directly from the dashboard to move cases toward logical closure. The ability to drill down to minute details right from the dashboard saves you numerous clicks and time. The LawTrax platform offers easy drag-and-drop functionality for your KPIs that are configurable to display data visually as charts. With just one click, it will assist you in making informed decisions while nudging respective stakeholders regarding any delayed activities through the built-in notification engine. This feature is enabled for all stakeholders on the platform.
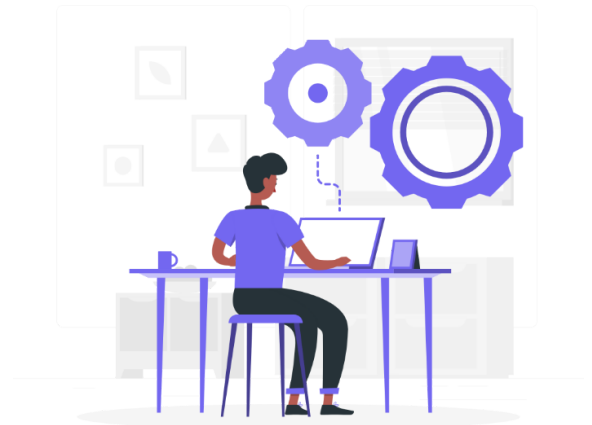
Reporting

LawTrax has a comprehensive reporting system that provides detailed information and statistics for crucial decision-making aimed at streamlining and enhancing existing processes, performance, and productivity.

- Create customized reports quickly with personalized branding.

- Use report statistics to gain insight into potential new opportunities.

- Utilize report statistics to streamline processes and enhance performance.

- Run an audit trail report to check who performed what action across each case.

The reporting tool equips you with data that helps optimize your attorney operations.

PDF Generation

All cases must be submitted in hard copy to USCIS; therefore, to enable effective document management, LawTrax has an inbuilt PDF generator. The PDF generator first identifies the case type; based on the rules for that type of case, it collates the required data in USCIS or DoL format according to the rules and conditions necessary for each respective visa type before generating a document ready for submission.

Notifications and Template Management

Templates help reduce time spent on the system while improving productivity. LawTrax allows you to customize your email templates for effective communication with your customers.

Create your own customizable templates for support letters or cover letters with data automatically populating from your database—making data entry a breeze.

All notifications for respective stakeholders can be managed easily within LawTrax. Users can create templates and choose notification types—be it email or web alerts—adding static or dynamic content through simple data selection helps effectively communicate with stakeholders.

Actionable notifications will be published in real-time to stakeholders; a configurable service level agreement can be added to track progress.

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