MANSOOR LAW

FIRM WORKSPACE

01 Overview

02 Clients

03 Matters

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WORKSPACE SETTINGS

Team & permissions

Import from Excel

JL **Jordan Lee**
Firm administrator

Search clients, matters or invoices

INVOICES · DESIGN REVIEW

Invoices

Every matter, with a clear next step for billing.

↑ Upload invoice

+ Create invoice

NEED AN INVOICE
02
Create or upload an invoice

DRAFTS
02
Continue preparing

READY TO EMAIL
01
Review before sending

OUTSTANDING
$5,190
Sent invoices · $1,800 overdue

All matters 8 | Needs invoice 2 | Drafts 2 | Ready 1 | Sent 2 | Paid 1

Search matter, client or invoice

Matter type: All · Owner: All · Payment: All

Amounts in CAD · Balance includes HST

MATTER / CLIENT	MATTER TYPE	INVOICE	STATUS	BALANCE	LAST EMAILED	ACTION
E1008 Alex Morgan	Estate planning	—	Needs invoice	—	—	Create invoice Upload invoice
R2045 Priya Shah	Real estate	—	Needs invoice	—	—	Create invoice Upload invoice
E1007 Daniel Chen	Estate administration	Draft	Draft	—	Not sent	**Continue draft**
R2042 Sofia Reed	Real estate	Draft	Draft	—	Not sent	**Continue draft**
E1001 Jamie Parker	Estate planning	INV-1001	Ready to send	**$1,695.00**	Not sent	**Review & email**
R2038 Taylor Quinn	Real estate	INV-0998	Sent	**$3,390.00**	Oct 28 Due Nov 12	**View invoice** Email invoice
E0995 Robin Ellis	Estate administration	INV-0995	Overdue	**$1,800.00**	Oct 12 Due Oct 26	**View invoice** Email invoice
E999 Client 1 & Client 2	Estate planning	E999 Uploaded	Paid	**$0.00**	—	**View invoice** Email invoice

Showing 8 of 8 matters

‹ 1 ›

VISUAL CONCEPT · Illustrative records and statuses · No emails sent

Invoices mockup · Matter list · 02 Nov 2026

Upload invoice

Attach an existing invoice to a matter, then confirm its billing details.

← All matters

Choose the matter & file

Keep the original invoice with its client and matter.

MATTER

E1008 · Alex Morgan ⌄

MATTER TYPE

Estate planning

INVOICE CONTACT

estates@mansoorlaw.ca
Check that this matches the uploaded invoice header.

↑

Drop an invoice here

or choose a file from your computer

Choose file

PDF preferred · Word documents can be converted to PDF

PDF **E1008-Invoice-02Nov2026.pdf**
Example attachment · Replace / remove

Uploads retain their original layout. The CRM contact setting does not rewrite the uploaded invoice.

Confirm invoice details

Review these fields before adding the invoice to the matter.

INVOICE NUMBER

INV-1008

INVOICE DATE

November 2, 2026

DUE DATE

November 16, 2026

PAYMENT STATUS

Unpaid ⌄

CLIENT / BILL TO

Alex Morgan

AMOUNTS · CAD

Fees	$500.00
Disbursements	$0.00
HST	$65.00
Invoice total	**$565.00**

Already emailed outside the CRM?
Record the sent date and recipient so the invoice is not sent twice.

▫ This invoice has already been emailed

Save invoice & review

Cancel upload

The next view offers Download PDF and Email invoice. Uploading alone does not send an email.

Invoice E999

E999 · Client 1 & Client 2 · Estate planning

← All matters | Download PDF

Invoice preview

Paid · Balance $0.00

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INVOICE

File Number: E999

Company Information
Mansoor Law Professional Corporation
114 – 216 Oak Park Blvd.
Oakville, ON, L6H 0T8

Client Information
Client 1 & Client 2
1234 Street Avenue
City, Province, A1B 2C3
email@email.ca

RE: Type of Matter

DATE	DESCRIPTION	AMOUNT
Date	Matter Fee.	$500.00
	Subtotal	$500.00
	HST (73765 0945 RT0001)	$65.00
	Total	**$565.00**

PAID

Email invoice

Review the recipient, message and attachment.

TO

email@email.ca

FROM / REPLY-TO

estates@mansoorlaw.ca
Estate planning contact · connected mailbox required

SUBJECT

Mansoor Law invoice · File E999

MESSAGE

Dear Client 1 and Client 2,

Please find attached the paid invoice for your estate planning matter, file E999.

Thank you,
Mansoor Law

ATTACHMENT

PDF **E999-Invoice-02Nov2026.pdf**
Invoice total $565.00 · Paid in full

Send email

Save draft & return

Email history

No email recorded in this CRM.