Matters

A clear view of every file, its next step and who owns it.

+ Add client + Add matter

ACTIVE MATTERS	DUE TODAY	OVERDUE ACTIONS	COMPLETED
06	03	01	02
Includes 2 waiting on clients	Next actions across 3 matters	Needs staff follow-up	Still visible for billing and records

All matters 8 | Active 6 | Waiting on client 2 | Completed 2

Search matter or client

Matter type: All · Owner: All · Next action: All · Billing: All

Next-action dates are separate from key matter dates

MATTER / CLIENT	TYPE	MATTER STATUS	OWNER	NEXT ACTION	KEY DATE	BILLING STATUS	
E1008 Alex Morgan	Estate planning	Waiting on client	Jordan	Collect client information Due Nov 4	Nov 9 Target signing	Needs invoice	Open →
R2045 Priya Shah	Real estate	In progress	Jordan	Review purchase documents Due today	Nov 12 Closing date	Needs invoice	Open →
E1007 Daniel Chen	Estate administration	In progress	Sam	Review supporting documents Due today	Nov 16 Next milestone	Draft invoice	Open →
R2042 Sofia Reed	Real estate	In review	Jordan	Complete internal file review Due today	Nov 6 Closing date	Draft invoice	Open →
E1001 Jamie Parker	Estate planning	Signing scheduled	Sam	Confirm signing appointment Due Nov 5	Nov 6 Signing date	Ready to email	Open →
R2038 Taylor Quinn	Real estate	Completed	Jordan	Follow up on invoice Due Nov 4	Oct 28 Completed	Sent · unpaid	Open →
E0995 Robin Ellis	Estate administration	Waiting on client	Sam	Follow up on missing information Overdue · Oct 30	Nov 10 Next milestone	Overdue invoice	Open →
E999 Client 1 & Client 2	Estate planning	Completed	Jordan	No open tasks —	Oct 30 Completed	Paid	Open →

Showing 8 of 8 matters · Completed matters remain available

‹ 1 ›

MANSOOR LAW

FIRM WORKSPACE

01 Overview

02 Clients

03 Matters

04 Invoices

05 Reports

WORKSPACE SETTINGS

Team & permissions

Import from Excel

JL **Jordan Lee**
Firm administrator

Search clients, matters or invoices

MATTERS · DESIGN REVIEW

R2045 · Home purchase

Priya Shah · Real estate

In progress | Owner: **Jordan Lee** | Opened October 26, 2026

← All matters | Edit matter

Summary | Tasks **4** | Documents **3** | Notes | Invoices | Activity

Work to move forward

The next step, supporting tasks and the latest file notes.

NEXT ACTION · DUE TODAY

Review purchase documents

Review the documents received from Priya and confirm any missing information.

Jordan Lee · November 2 — Mark complete

Tasks — + Add task · View all →

☐	Review purchase documents	Today	Jordan
☐	Confirm outstanding client information	Nov 4	Sam
☐	Prepare invoice for review	Nov 6	Jordan
☑	Open matter and link client	Oct 26	Jordan

Recent documents — Upload document ↑

PDF **Purchase agreement.pdf** — Added October 30 · Priya Shah — View →

PDF **Client information.pdf** — Added October 26 · Jordan Lee — View →

Latest note — + Add note

> Purchase documents received. Jordan to review before confirming the next steps with Priya.
>
> Jordan Lee · October 30, 2026

Matter details

Client	Priya Shah ↗
Matter type	Real estate · Purchase
Closing date	November 12, 2026
Responsible staff	Jordan Lee
Contact email	realestate@mansoorlaw.ca

Matter contact follows the selected matter type.

Billing

Needs invoice

INVOICES

0

No invoice created or uploaded yet.

Create invoice | Upload invoice

Once added: view, download or email the invoice.

Recent activity

- **Review task assigned to Jordan** — November 2 · Sam
- **Purchase agreement added** — October 30 · Priya Shah

View full activity →