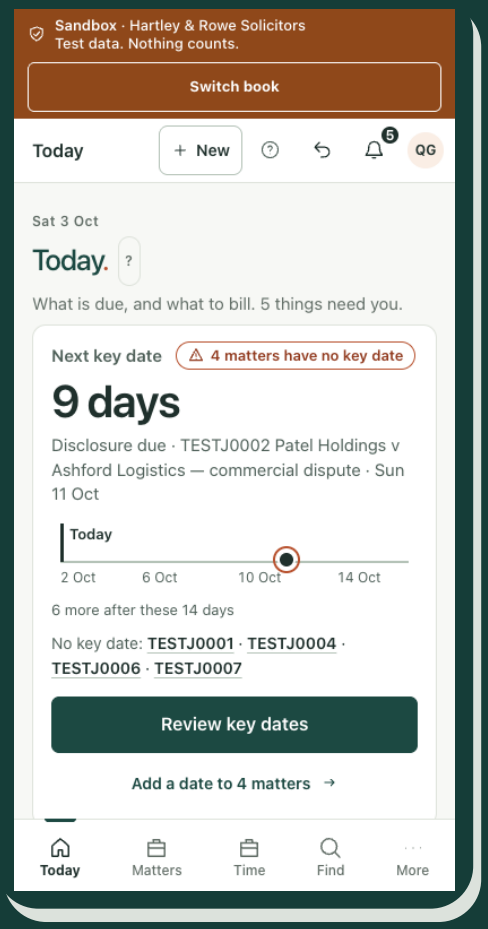
LEGAL PRACTICE. CONNECTED.

From instruction to insight.

Your matters. Your evidence. Your practice, in one place.

A connected workspace for legal professionals, expert witnesses and specialist report writers - with the financial tools to run the business behind the work.



MOBILE / SANDBOX CAPTURE

01 Manage every matter

02 Build a traceable report

03 Keep the finances connected

LEGAL WORK. CONNECTED. / NOVEMBER 2026

From the first instruction to the final report and reconciled payment. Specialist legal tools, everyday bookkeeping and accountant collaboration in one connected book.

ONE CONNECTED PRACTICE

The work and the business. Together.

Follow one instruction from the first conversation to a reconciled payment, without losing the evidence or the decisions along the way.

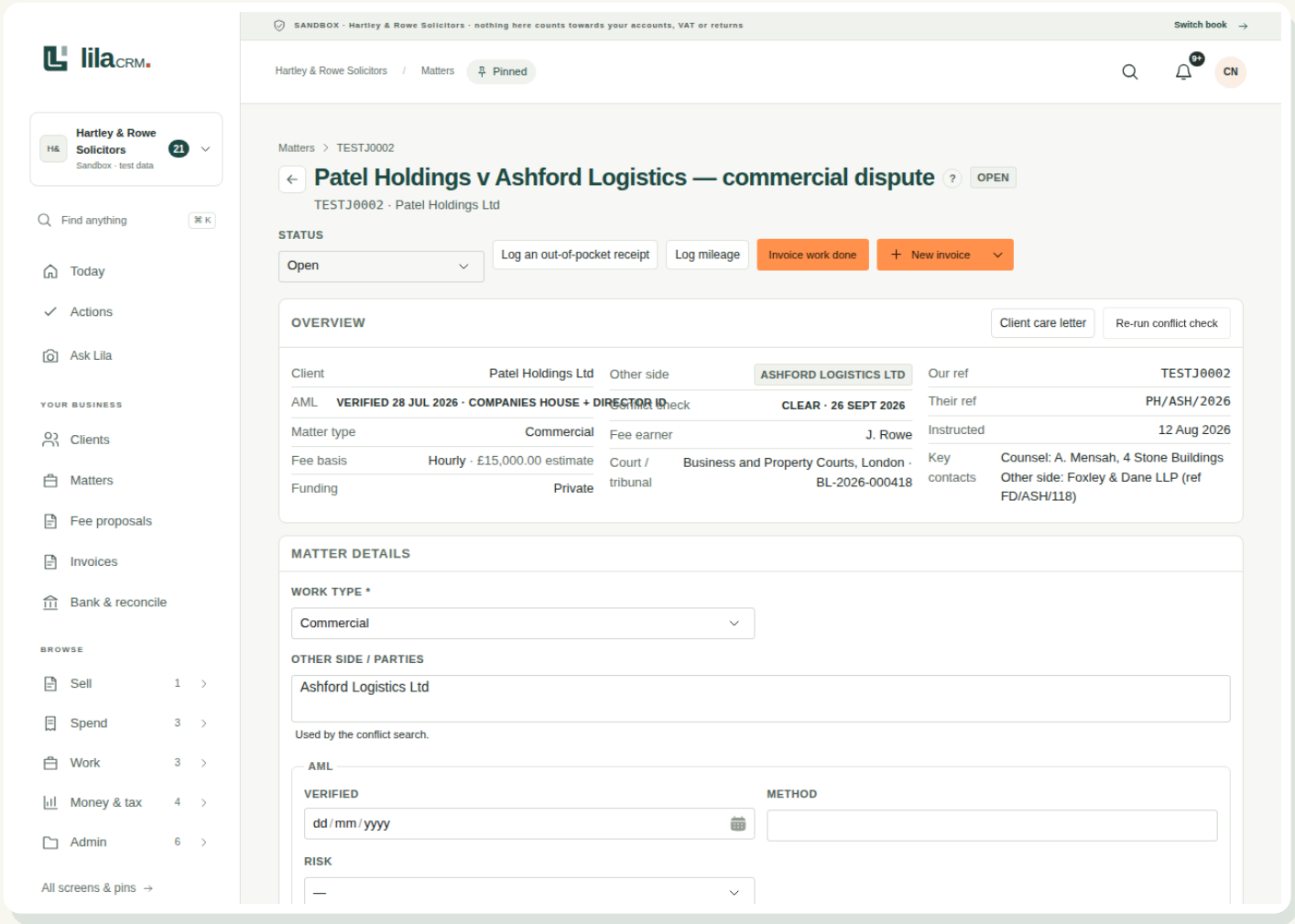
01	Receive	Capture the instruction, parties, conflicts and agreed scope.
02	Prepare	Gather documents, identify issues and confirm key dates.
03	Produce	Draft with citations, collaborate and approve the exact version.
04	Deliver	Release the report and share a controlled bundle.
05	Get paid	Bill time and costs, collect payment and reconcile the bank.

One client record. One matter history. A clear route from professional work to the financial records behind it.

01 / MATTERS & INSTRUCTIONS

Every instruction has a home.

Bring the people, scope, checks, dates and fees into a single matter workspace.



DESKTOP / ARCHIVED SANDBOX CAPTURE

Know the instruction

Client, opposing parties, court reference, instructing solicitor and responsible fee earner.

Open with confidence

Conflict decisions, identity checks, engagement terms and accepted fee proposals.

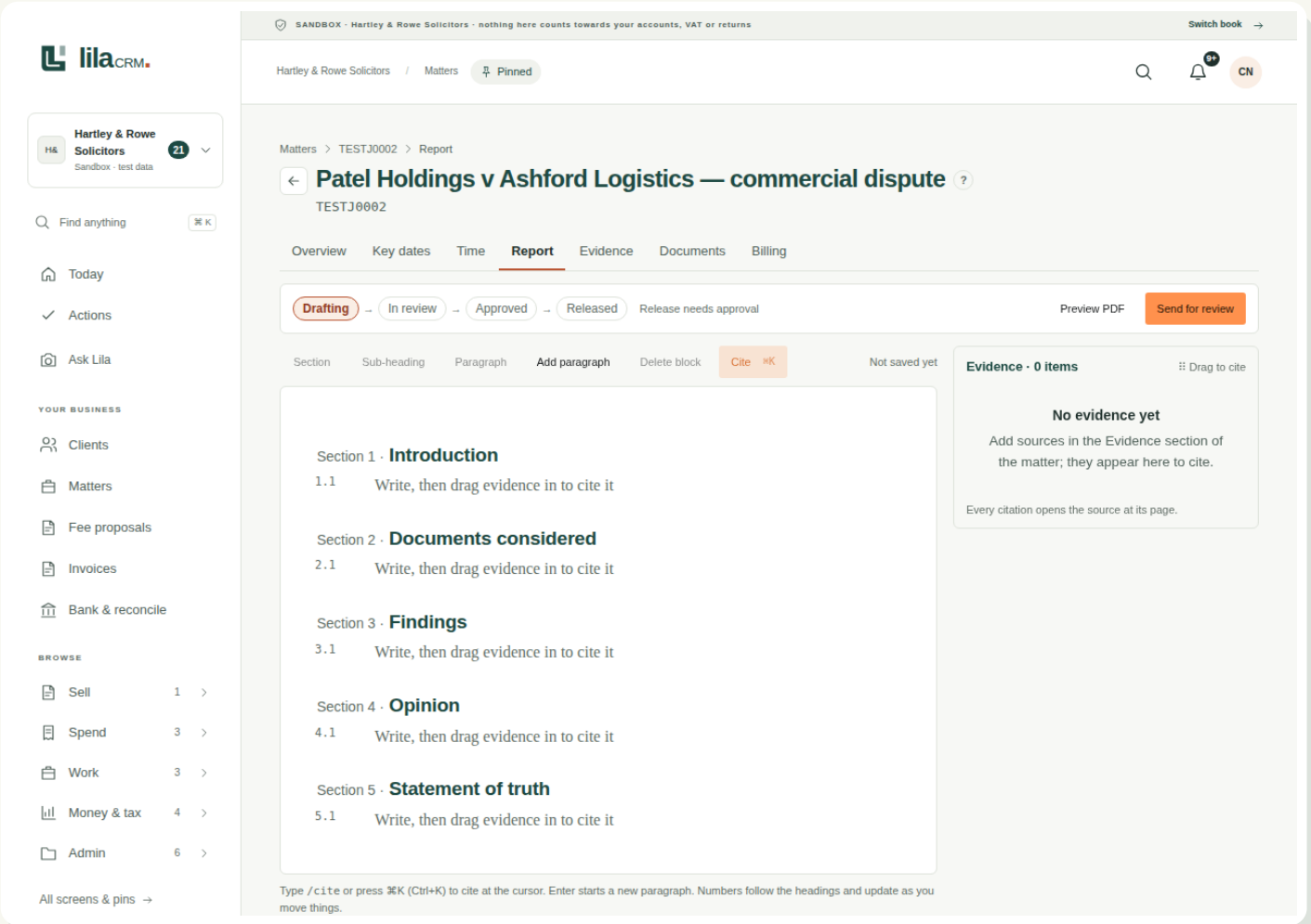
Keep it moving

Stages, owners, dependencies and next actions show what needs attention.

02 / EVIDENCE & REPORTING

An opinion you can trace.

Connect each conclusion to the material behind it, then release the version that was reviewed.



DESKTOP / ARCHIVED SANDBOX CAPTURE - REPORT STARTER OUTLINE

Evidence beside the words

Stable evidence references, page locators, citation links and a searchable source register.

Review in context

Inline comments, tracked revisions, Word exchange and controlled reviewer approvals.

Release with a record

Approved version, final PDF, evidence schedule and a history of who approved and released it.

03 / DEADLINES, BUNDLES & EXPERT WORK

Ready for the next stage.

The diary, evidence pack and expert workflow stay connected to the same instruction.

A

Dates with provenance

Instruction, inspection, service, questions, joint statement and trial. Date suggestions retain their source; the user reviews them before diarising.

B

A complete expert workflow

Track written questions and answers, agreed and disputed issues, joint statements, addendum reports and changes in opinion.

C

Bundles built for review

Arrange documents, preview sections, apply pagination or Bates numbers, add OCR, bookmarks and a linked index. Create supplementary and recipient-specific packs.

D

Evidence ready to share

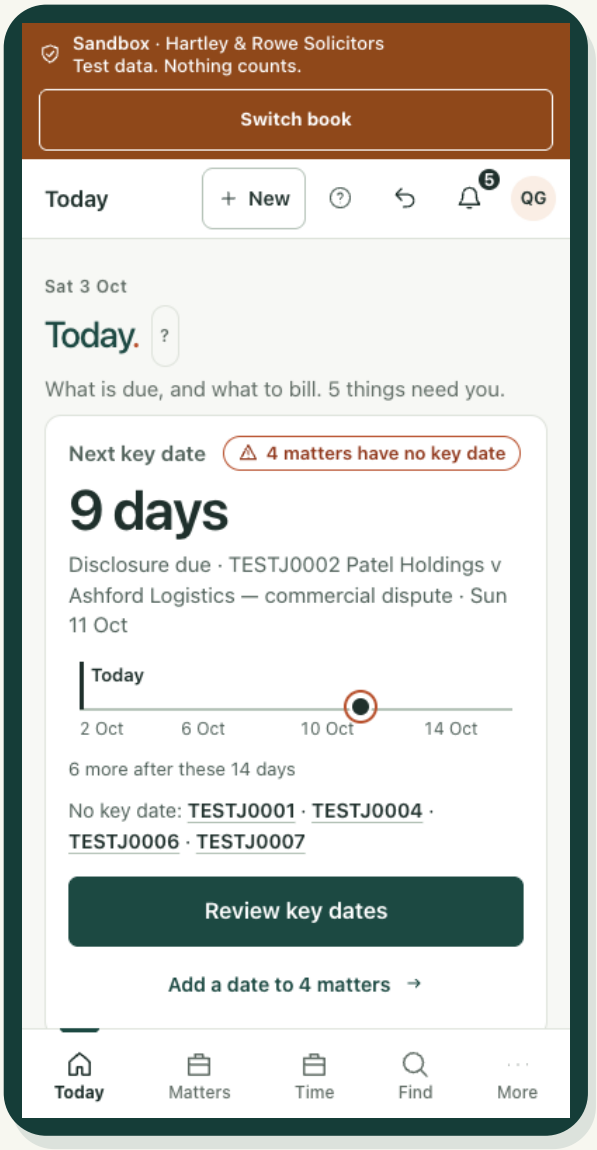
Annotate, compare and redact. Preserve originals, check the disclosure copy and share the right version with named recipients and expiry controls.

Limitation dates and court directions remain visible alongside delivery dates. Escalations, missing-date warnings and closure checks keep unresolved work in view.

04 / TIME, FEES & MOBILE WORKING

Capture the work. Protect its value.

Record time and costs while the detail is fresh, whether at a desk, on an inspection or between meetings.



MOBILE / ARCHIVED SANDBOX CAPTURE

A useful day at a glance

See the next deadline, missing dates, matters needing a decision and work ready to bill.

Time that belongs to the matter

Six-minute units, timers, activity codes, fee-earner rates and chargeable or non-chargeable work.

The whole cost of delivery

Mileage, receipts, court fees, counsel, experts and other disbursements stay with the instruction.

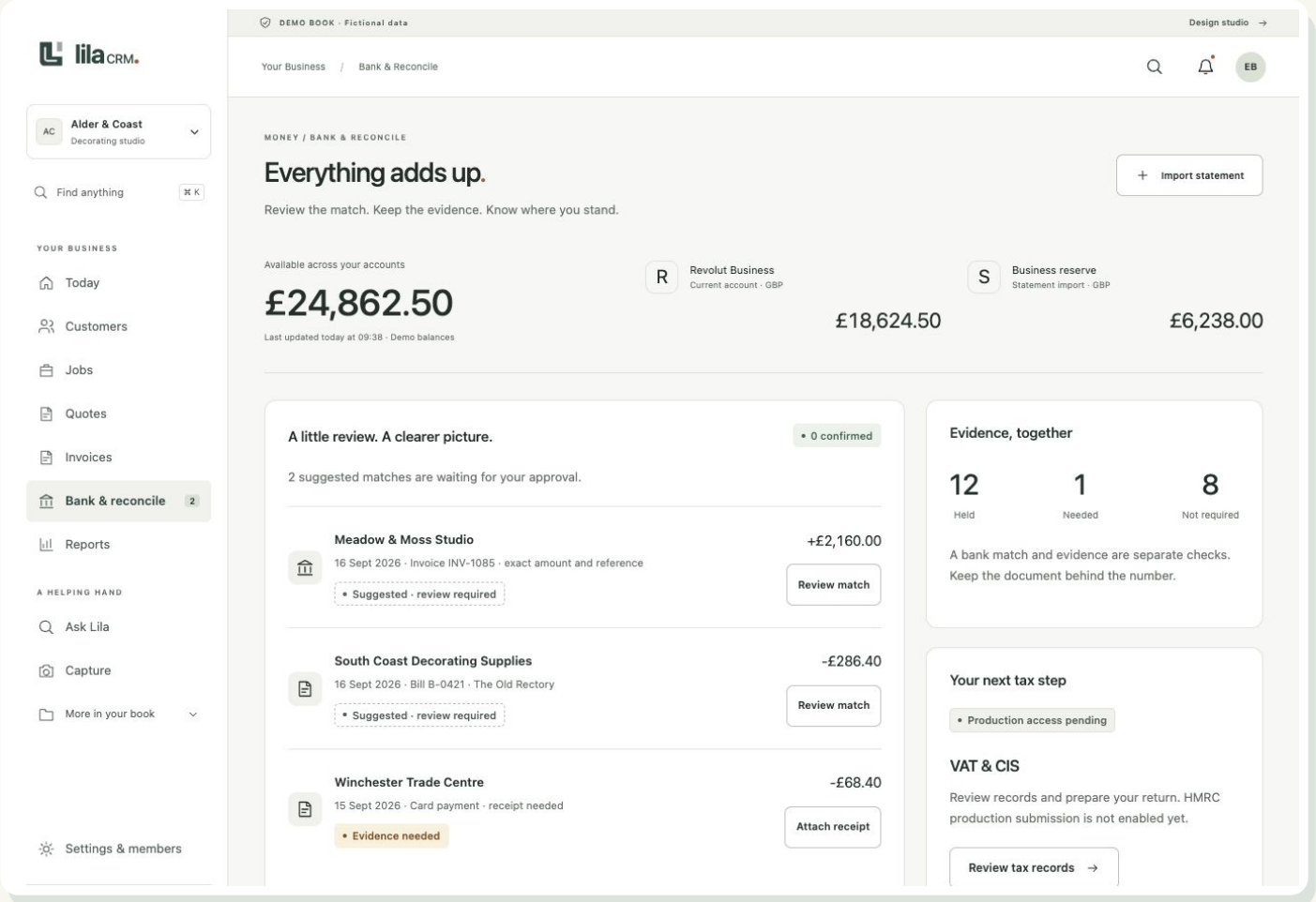
Stay within the agreement

Monitor fixed fees, hourly estimates and budgets. Spot cost pressure and review scope before it becomes a difficult conversation.

05 / BANKING & RECONCILIATION

See what happened. Keep the evidence.

Connect bank activity to invoices, bills and receipts, with reviewable matches and a clear reconciliation trail.



DESKTOP / ILLUSTRATIVE UNIVERSAL BANKING CONCEPT - FICTIONAL DATA

Bring the bank together

Supported bank feeds and statement imports, multiple accounts, balances and transaction history.

Reconcile with confidence

Suggested matches, part payments, split allocations, transfers and unmatched-item review.

Keep the proof

Attach the receipt or bill, inspect the coding and retain the link from bank line to source record.

06 / QUOTES, INVOICES & GETTING PAID

From agreed scope to money received.

Professional proposals and billing share the same client and matter information as the work itself.

Quoting and engagement

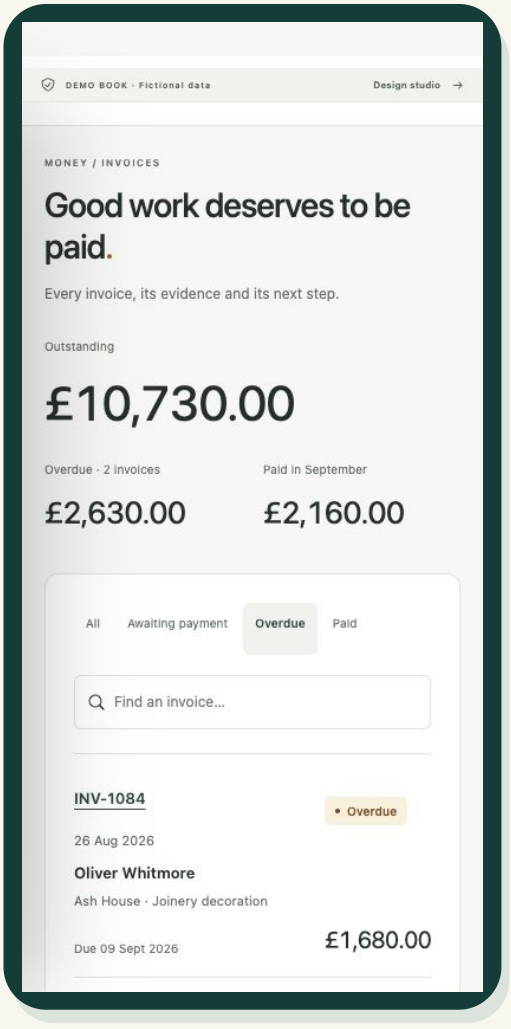
Build a fee proposal with scope, assumptions, stages, fees, disbursements and VAT. Record acceptance, engagement signatures and subsequent changes.

Flexible, accurate billing

Create fixed-fee, hourly, interim, final and recurring bills. Bring unbilled time and recoverable costs through to clear invoice lines.

Payment and credit control

Send branded PDFs, offer supported payment options, track part payments and credits, issue statements and manage overdue reminders.



MOBILE / INVOICING CONCEPT

The same chain stays intact: proposal / matter / work and costs / bill / payment / bank reconciliation.

07 / THE UNIVERSAL FINANCIAL TOOLKIT

The books behind the practice.

A complete business-finance workspace alongside the specialist legal tools - not a separate spreadsheet exercise.

01

Spend & suppliers

Supplier records, purchase bills, due dates, recurring costs, credits and payment history.

02

Capture & expenses

Receipt capture, document extraction, expense categories, staff claims and matter allocation.

03

Bookkeeping & VAT

Accounts, transaction coding, journals, VAT treatment, period checks and return preparation.

04

Cash flow & performance

Profit and loss, balance sheet, aged debtors and creditors, cash forecasts and budget comparisons.

05

Accountant handover

Controlled access, source-linked records, period review, exports and year-end working information.

06

Client money

Separate client and office ledgers, three-way reconciliation, authorised transfers, residual balances and cashier reports.

Connected services and filing follow the applicable provider, entity and authorisation requirements.

08 / CONFIDENTIALITY & COLLABORATION

The right information. The right people.

Confidentiality follows the matter, through documents, communications, search, exports and AI assistance.

Matter teams & ethical walls

Grant access by client, matter and document. Apply information barriers to people and connected tools.

Checks with a history

Record conflict decisions, ID/AML screening, sanctions and PEP results, source-of-funds evidence and review dates.

A secure client workspace

Exchange files, requests, messages, appointments, signatures and approvals with clients and instructing solicitors.

Document governance

Manage versions, tracked changes, approved copies, retention schedules, legal holds and authorised disposal.

Controlled delivery

Use recipient-specific packs and expiring links. Revoke access and review who opened the material.

Visible accountability

Maintain a history of access, decisions and material changes. Separate drafting, approval and release responsibilities.

Professional judgement stays with the authorised person.

09 / UK HOSTING & AI PRIVACY

Confidentiality by design. AI on your terms.

Keep control of where practice data is held, which AI features are enabled and how confidential material is processed.

Practice data is held within the United Kingdom on Amazon Web Services (AWS).

Turn AI on or off

Enable or disable AI features to suit the practice, the matter and your data-protection policies. The core legal and accounting workflows remain usable without AI.

Local LLM processing

Selected AI features use locally hosted large language models (LLMs) within the controlled environment. In local-only mode, their inputs and outputs are not sent to external LLM services.

No use for model training

AI processing is configured for no training use. External AI services are enabled only with provider settings and terms that prohibit using practice inputs and outputs to train their models.

A clear processing boundary

Distinguish local-only features from optional external AI. Review the provider, processing location, retention and permitted data before enabling an external service.

These controls support UK GDPR compliance and professional confidentiality. Compliance also depends on lawful use, appropriate agreements, access controls and the practice's own procedures.

10 / ASSISTANCE & PRACTICE INSIGHT

Less searching.
More understanding.

Ask useful questions of the practice, then move from the answer to the record or reviewed action.

> “Which reports are due next month, what evidence is missing, and what can we bill today?”

ASK LILA / EXAMPLE QUESTION

Answers grounded in your records

Find matters, citations, deadlines, unbilled work and overdue balances. Open the supporting record and review the facts behind an answer.

Useful preparation

Extract proposed dates, organise source material, prepare drafts and summarise activity. Review suggestions before they become decisions or outgoing work.

A practice you can measure

Understand fee-earner utilisation, recovery, write-offs, matter profitability, workload, capacity and referral performance.

Workflows that fit the practice

Use configurable stages, dependencies, responsibilities and specialist practice-area templates for repeatable delivery.

THE CAPABILITY MAP

One book. A broad toolkit.

A quick reference for the legal professional reviewing the complete product proposition.

CLIENT & MATTER

Instructions; parties; connected contacts; conflicts; ID/AML; engagement; funding; matter teams; stages; tasks.

DATES & EXPERT WORK

Limitation; court directions; service dates; inspections; questions and answers; joint statements; trial; addenda.

DOCUMENTS & EVIDENCE

Files and links; versions; chronology; library; stable evidence references; page locators; search; exports.

DRAFTING & REVIEW

Numbered report editor; citations; Word exchange; templates; tracked changes; inline comments; independent approvals.

BUNDLES & DELIVERY

Indexes; OCR; Bates numbering; bookmarks; comparison; annotations; redaction; supplementary packs; controlled sharing.

TIME & FEES

Timers; six-minute units; activities; fee-earner rates; fixed fees; budgets; WIP; mileage; disbursements.

SALES & COLLECTIONS

Quotes; fee proposals; acceptance; e-signatures; invoices; recurring bills; credits; statements; reminders; payments.

BANKING & BOOKKEEPING

Bank feeds and imports; reconciliation; splits; transfers; receipts; bills; expenses; journals; VAT; reporting.

CLIENT MONEY & GOVERNANCE

Separate ledgers; three-way reconciliation; approvals; information barriers; access history; retention; legal holds.

ASSISTANCE & MANAGEMENT

Ask Lila; AI on/off; local LLM options; no-training terms; UK AWS hosting; profitability; accountant access; mobile working.

UK AWS hosting. Configurable AI. Local-model options for confidential work.

THE BOOKKEEPER

Paperwork in. Clarity out.

A practical bookkeeping workspace that connects original documents, financial records and the questions that need a person.

Capture / read / check / code / reconcile.
Keep the original and the decision together.

Capture once

Photograph receipts, add PDFs or share documents from your phone. Keep the upload status visible and retain the original for review.

Collect the paperwork

Use supported supplier connections to collect invoices. Bring email attachments and correspondence into the document inbox.

Check before posting

Review extracted dates, totals, VAT and supplier details. Flag possible duplicates, unclear documents and uncertain matter allocations.

Rules that you control

Set supplier, category, value and VAT rules within agreed authority. Routine entries follow those rules; exceptions ask a specific question.

Link costs to the work

Allocate purchases, mileage and disbursements to the correct matter. Keep private, business and client-money treatment distinct.

Finish the reconciliation

Match bank entries to bills and invoices, handle part payments and splits, review unmatched items and retain a visible correction history.

Document capture alone does not prove payment, tax eligibility or submission. The underlying evidence stays available to the reviewer.

THE ACCOUNTANT WORKSPACE

A stronger handover. A clearer year end.

Give the adviser the records, context and working papers behind the numbers, with controlled access to the correct book.

01

Access with boundaries

Invite your accountant or bookkeeper with the permissions they need. Shared-book membership and authority to act for HMRC remain separate.

02

Review the evidence

Inspect transactions, source documents, reconciliations and unresolved questions. See missing information and estimates before completing the accounts.

03

Accounting tools

Review the ledger, opening balances, trial balance, journals, fixed assets, depreciation and relevant loan or director-account working records.

04

A complete period pack

Export sales and purchases, nominal entries, aged balances, bank reconciliation, VAT/CIS records, hours and supporting documents with a file manifest.

05

Accounts & tax preparation

Prepare the applicable year-end, Self Assessment, company accounts and Corporation Tax working information for the entity and accounting period.

06

A managed review

Resolve requests, record adjustments and retain the review trail. Hand over documents and exports without confusing a draft with an accepted filing.

Service coverage follows the legal entity, period and enabled workflow. The person with the required authority approves final filings.

HMRC & GOVERNMENT CONNECTIONS

From the records to the right return.

Bring obligations, supporting figures and review into one place, with a clear distinction between preparation, submission and acceptance.

VAT & Making Tax Digital

Connect the appropriate HMRC VAT service, review obligations and the nine-box return, trace figures to records and retain submission receipts where filing is enabled.

Income Tax & Self Assessment

Organise self-employment and property records, quarterly-update figures, annual tax information and calculation reviews. The applicable taxpayer, year and service determine the route.

CIS, PAYE & charity services

Use CIS verification and deduction records, payroll/PAYE working information and Gift Aid schedules where relevant. Each connection shows its own readiness and authority requirements.

Companies House

Keep company identity, filing dates, accounts preparation and company-document history alongside the books. Companies House is a separate service from HMRC.

Connection & agent authority

Review the service, account, taxpayer, consent and authorisation. An accountant invitation does not grant government-agent authority.

Receipts & status

Distinguish preparation, ready for review, sent, waiting and accepted. Keep the original acknowledgement; a saved local record is not an HMRC acceptance receipt.

Direct submission is available only for enabled services with verified production access and the required authority. Other workflows provide preparation, exports or external-filing records.