VakilMitra

User guide

The practice desk for advocates and small chambers: the hearing diary, case files, clients and fees, on your own website.

- Where to start and how to set up
- The daily routine: board, after-hearing update, cause list
- Every screen, setting and report explained
- Lite and Full, the phone app and the public demo

Version 0.8.2 · For advocates, associates, clerks and accountants

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VakilMitra is a private practice desk for advocates and small chambers. It keeps the three things a chamber cannot afford to lose: the hearing date, the file and the fee. It runs on your own WordPress website, so your clients' papers stay with you.

01 Why VakilMitra

Most chambers run on a paper diary, a clerk's memory, WhatsApp forwards and an Excel sheet. VakilMitra puts the same work in one place without changing how you work.

Problem in the chamber	What VakilMitra does
A date is missed because the diary was not updated	After each hearing you enter what happened and the next date in one step. Matters with no next date are listed in red on the dashboard every day.
The evening cause list is written out by hand	Tomorrow's matters print on one sheet, court by court, with space to write the next date.
Papers are spread over email, WhatsApp and desks	Pleadings, orders and client papers are filed against the matter and stored privately on your site.
Nobody is sure what a client still owes	The fee agreed, appearance fees, invoices with a UPI QR code, receipts and what is outstanding.
Clients call after every hearing	A one-tap WhatsApp update after the hearing, automatic reminder emails, and a private portal where clients see their next date.
Software priced per person, data on someone else's cloud	One price per chamber, everything on your own website, and every list can be exported at any time.

VakilMitra does not try to be a legal research database or a court portal. It keeps your own diary, files and fees in order.

02 Getting started

Install the plugin once, open the app at **yoursite.com/app/**, and follow the checklist on the dashboard.

What you need

- A WordPress website (6.4 or later) on PHP 8.1 or later. Ordinary shared hosting such as Hostinger works; nothing else needs installing.
- HTTPS on the site (free SSL from your host). It protects client data and is needed to install the phone app.
- A browser on a computer, tablet or phone.

Which zip to install

Every version of VakilMitra comes as two zips. Both install the same way and use the same data, so you can move from one to the other at any time.

Zip	What it is
`vakilmitra-lite-<version>.zip`	**VakilMitra Lite, free.** Clients, matters, hearing diary, calendar with holidays, tasks, the morning email and the core reports, for up to 2 users. The Pro screens are shown as previews with sample data.
`vakilmitra-pro-<version>.zip`	**VakilMitra Pro**, the download you get after buying. It runs as Lite until you enter your licence key, then every feature is on, for up to 20 users.

A licence key turns on Pro in either zip, without reinstalling.

Install

1. In WordPress, go to Plugins → Add New → Upload Plugin, choose the zip and click Install Now, then Activate.
2. Open **yoursite.com/app/**. The WordPress administrator signs in and is the Owner. Staff who sign in go straight to the full-screen app and never see the WordPress admin area.
3. If `/app/` shows "page not found", go to WordPress → Settings → Permalinks and click Save once.
4. Before you enter any PAN or bank account number, ask your web person to add this line to `wp-config.php` with a random string of at least 32 characters. Never change it afterwards, or those numbers cannot be read back:

```
define( 'VM_ENCRYPTION_KEY', 'your-long-random-string' );
```

Upgrading, or moving from Lite to Pro. Upload the new zip the same way. WordPress says the plugin is already installed: click **Replace current with uploaded**. Your data is not touched.

What is already loaded. A new install already has the Supreme Court, all 25 High Courts, common local courts and tribunals, 40 Indian case types, 13 stages, 23 purposes of hearing, and holidays for this year and next. You only need to rename the local courts to your own (for example "District Court, Nagpur") and remove the ones you never appear in.

First-day checklist. The dashboard shows these steps and ticks each one off:

1. Fill in the firm name, phone and address under Settings → Firm. They print on every report.
2. Keep only the courts you appear in, and add your local ones (Settings → Lists → Courts).
3. Add or import your clients.
4. Add or import your matters with their next dates.
5. Make sure the site uses HTTPS.
6. Set up the scheduler so the morning email arrives on time (Settings → Emails).

Try it with sample data first. On an empty install, the dashboard offers **Load sample data**. It creates a sample Nagpur chamber with clients, matters, hearings, tasks and fees. Load it only into an empty install, because sample and real records must not be mixed. A good habit is to explore on a separate test site and start your real diary on a clean one.

03 Moving around

The left menu groups the screens. Each person sees only what their role allows; Pro screens show a lock in Lite.

Menu	What is there
Dashboard	Today's and tomorrow's hearings, the next 7 and 30 days, hearings waiting for an outcome, matters with no next date, tasks due, coming holidays and counts by court and stage.
Calendar	Month, week and list views of hearings, tasks and holidays. Filter by advocate or court.
Daily board	One day's hearings, court by court, with the after-hearing step for each.
Matters, Clients, Tasks and deadlines, Documents	Your records. Each list has search, filters, Add, Import and Export.
Fees and invoices, Drafting, E-sign, Client portal, Conflict search	Paid editions.
Reports	Printable registers and statements.
Phone app	How to install VakilMitra on a phone or computer like an app.
Help	This guide.
Audit trail, Settings	For the owner and those allowed.

On a phone, tap ☰ at the top left to open the menu. Your name at the top right opens your profile, password, language, two-step sign-in and Sign out.

04 A day in the chamber

The routine VakilMitra is built around takes a few minutes a day.

Morning. Each person gets an email with their hearings for today and tomorrow, tasks due and hearings still waiting for an outcome. The same view is on the dashboard.

In court, after each hearing. Open the Daily board (or the hearing on the dashboard) and press **Update**. In one step enter:

- what happened (heard, adjourned, not reached or cancelled), with a line about it and the order passed;
- the **next date** and what it is for;
- the stage, if it moved;
- or mark the matter **disposed** with the result.

VakilMitra files the next date as a new hearing and keeps the matter's next date, last date and stage current. If the next date falls on a holiday or a Sunday it tells you. With Pro, **Send on WhatsApp** then opens a message to the client already written: the matter, what happened and the next date, sent from your own WhatsApp.

Evening. Print tomorrow's cause list from the dashboard (Tomorrow's cause list) or Reports → Daily cause list: one sheet, court by court, with space to write the next date. With Pro the same list also arrives by email after 6 pm.

Every day, check the red list. "No next date" on the dashboard lists active court matters with no future hearing, and "Waiting for outcome" lists past hearings nobody updated. Clearing both lists daily is what stops dates from being missed.

05 Clients and matters

Clients. Add a client with name, mobile, email and address. Organisations can have a contact person. Turn off "Email this client before each hearing" for anyone who should not get reminders. PAN is stored encrypted and masked on screen. A client's page lists all their matters.

Matters. A matter is any piece of work: a court case, advice, drafting, a legal notice or a registration. Each matter gets a file number such as `VM-2026-0001` (change the prefix in Settings → Firm). For court cases record:

- court, case type, case number, court room or bench, judge, filing date, acts and sections;
- the **CNR number** (16 characters from eCourts). The matter page then has a button that opens the case on the eCourts website;
- which side you appear for, the parties and the advocate on the other side;
- the advocate in charge, the associate and the clerk;
- the stage and status (active, on hold, disposed or file closed).

When you add a new matter you can give its next date straight away; it becomes the first hearing in the diary.

The matter page shows everything about one matter in order: facts, every hearing with what happened, tasks, documents, fees and, with Pro, drafts and signatures. Print it as the **Matter history sheet** before a hearing.

Deleting. Only the owner deletes by default. A deleted record moves to Deleted items with the reason, and the owner can restore it. A matter's hearings and tasks are hidden with it and come back when it is restored.

06 Calendar, hearings and holidays

The calendar shows hearings, tasks and holidays together. Click a day to see its board, click a hearing to update it, or add a hearing on any date. Filter by advocate or court.

Holidays. Holidays come in five calendars: India, United States, Worldwide, Court holiday or vacation, and Our office. Choose which ones show under Settings → Calendar. Indian festival dates for 2026 and 2027 come from the Government of India holiday orders; the four that depend on the moon (Id-ul-Fitr, Bakrid, Muharram, Id-e-Milad) are marked "to be confirmed". Every High Court publishes its own calendar: add its vacations under Settings → Lists → Holidays, or import them from `court-holidays.csv`. To add next year's fixed-date holidays, use Settings → Calendar → Add holidays for a year.

Phone calendar (Pro). Calendar → Phone calendar gives each person a private link that shows their hearings in Google Calendar, an iPhone or Outlook, next to their own appointments. New dates appear on their own. Make a new link at any time to cancel the old one.

07 Tasks and deadlines

A **task** is something to do: file the written statement, collect papers, pay court fee. A **deadline** is a date that must not be missed: limitation, reply due, compliance. Both have a due date, a person and a priority, and can be linked to a matter.

For a deadline, note the rule or section you calculated it from. VakilMitra does not calculate limitation for you; it makes sure the date you worked out is never forgotten. Overdue items show on the dashboard and in the morning email.

08 Documents

File every paper against its matter: pleadings, orders, evidence, vakalatnama, correspondence and client papers. Files are stored privately on your website, outside public reach, and can only be opened by signed-in people allowed to see that matter. The largest file allowed is 25 MB or your host's upload limit, whichever is smaller.

Paid editions add:

- **Versions:** upload a new version of a document and keep every earlier one, with who uploaded it and when.
- **Share links:** let one person download one document until a date you choose; cancel the link at any time.
- **Download log:** who opened or downloaded each file, and when.
- **Show to the client** in the client portal.

09 Fees and invoices (Pro)

Fees and invoices replace the separate fee register.

- **Fee agreement per matter:** fixed, per appearance, retainer, hourly or staged. With "per appearance", the fee is added on its own each time you mark a hearing attended.
- **Expenses:** court fee, stamp duty, typing, travel and clerkage, billable to the client or not.
- **Invoices** on your letterhead with numbering, optional GST and a **UPI QR code** the client scans to pay.
- **Receipts:** full or part payments and advances.
- **What is owed:** outstanding fees by client with ageing, a receipts register, an invoice register, client statements and work not yet billed.

GST on advocates' fees depends on who the client is. Set it up with your accountant.

10 Drafting and e-sign (Pro)

Drafting. Templates fill in the client, court, case number, parties and dates for you. A starter pack includes vakalatnama, legal notice, reply to a notice, engagement letter, fee quotation, affidavit and more, plus a clause library (jurisdiction, arbitration, confidentiality, notices and others) you can insert into any draft. Drafts are saved against the matter, marked "draft for review" until you finalise them, and print on your letterhead or download for Word.

E-sign. Send a finalised document to a client by link. The signer confirms a one-time code sent to their email, types or draws a signature and accepts. You keep the frozen text, its fingerprint, the times and the device on a signing record.

This is a simple electronic signature. It suits engagement letters, fee terms and consents. It is not an Aadhaar eSign or a digital signature certificate. Affidavits, vakalatnamas and anything that must be stamped, attested or registered still need paper.

11 Client portal (Pro)

Give a client a login from their client page (**Give login**). They sign in to a private page that shows only their own matters: stage, last hearing, next date, the documents you chose to share and their invoices. They can also send messages to the chamber. You decide matter by matter what the client sees, and you can take the login away at any time; their records stay. Nothing in the portal is public or visible to search engines.

Conflict search. Before accepting a brief, search a name across clients, opposite parties and opposing advocates, and see every matter where it appears and on which side.

12 Reports

Every report prints on your letterhead. In the print window choose **Save as PDF** to get a PDF; every report can also be exported to CSV for Excel.

Report	Edition
Daily cause list	All
Hearing calendar	All
Matters with no next date	All
Matter history sheet	All
Client case-status report	Paid
Pending matters register	Paid
Disposed matters register	Paid
Adjournment analysis	Paid
Limitation and deadline register	Paid
Task list by person and workload by person	Paid
Document index for a matter	Paid
Fees outstanding, receipts register, invoice register	Paid
Client statement of account, fee and expense statement for a matter, work not yet billed	Paid

13 Bringing in your existing diary

Every list has an **Import** button with a template and an example file. Fill the template in Excel, save it as CSV, and upload it. Nothing is saved until **Check file** has shown every problem row by row. Dates may be written as dd-mm-yyyy.

Import in this order:

1. `clients.csv`: your clients.
2. `matters.csv` (Pro): your whole diary in one file, with court, case number and next date. A client named in the file who is not in your list yet is created for you, and the Next date column becomes the first hearing. In Lite, add matters one by one.
3. `court-holidays.csv`: your High Court's calendar, under the Court holiday calendar.

Courts and case types in the file are matched by name or short code, so check that your local courts are in Settings → Lists first.

14 Users, roles and permissions

Adding a person. Settings → Users → Add user: name, email, mobile, a password (at least 10 characters with letters and numbers) and a role. Share the username and password with them; they sign in at yoursite.com/app/. People are deactivated, never deleted, so their history stays readable. Lite allows 2 users and Pro 20.

The built-in roles

Role	What they do
Owner / Admin	Everything, including delete, settings and users. Cannot be changed.
Advocate	Partner or senior. Sees every matter, adds and edits, sees reports. Cannot delete unless the owner allows it.
Associate / Junior	Sees and edits only the matters they are assigned to. Cannot delete.
Clerk	Keeps the diary: next dates, hearings, tasks and client details for the whole chamber. Cannot delete.
Accountant	Fees, invoices, receipts and fee reports. Sees clients and matters but cannot change them.
Viewer	Read-only access to the diary, matters and reports.

Changing a role. Settings → Roles and permissions. Each area has View, Add, Edit, Delete and Export. For example, tick Delete in the Tasks row to let clerks delete tasks. You can create your own roles and turn on **Own records only** so a role sees just the matters assigned to that person.

Safeguards that always apply: every delete needs a reason, kept in the audit trail; nobody can give a role more than they have themselves; staff never reach the WordPress admin area.

15 Emails and the scheduler

Settings → Emails:

- **Morning email** to each person at the hour you choose: their hearings today and tomorrow, tasks due and hearings waiting for an outcome. Include or leave out tasks.
- **Evening email** (Pro) with tomorrow's cause list, after 6 pm on days when something is listed.
- **Hearing reminders to clients** (Pro): an email a set number of days before each hearing, only to clients with an email address and reminders turned on. For example `3,1` sends one three days before and one the day before.
- **Send me a test email** checks that your site can send email at all.

The scheduler. WordPress only runs scheduled jobs when someone visits the site, so on a quiet site the morning email can be hours late. Fix it once: in your hosting panel (Hostinger: Advanced → Cron Jobs) add a cron job that opens the address shown under Settings → Emails every 30 minutes. The dashboard warns the owner if the scheduler has not run for a day.

If emails do not arrive at all, your host may block WordPress mail. Install an SMTP plugin and connect it to your email account.

16 Use it like an app on your phone

VakilMitra can be installed on a phone, tablet or computer. It then opens full-screen from its own icon, straight to your board, like any other app. There is nothing to download from an app store. Open **Phone app** in the menu for the steps on the device you are using.

- **Android (Chrome):** open the app address, sign in, then tap ⋮ (top right) → **Install app** or **Add to Home screen**. When the phone offers it, the Phone app screen also shows an **Install** button.
- **iPhone or iPad (Safari):** open the app address in Safari, sign in, tap the Share button (square with an arrow) → **Add to Home Screen** → Add.
- **Computer (Chrome or Edge):** open the app address and click the install icon at the right end of the address bar, or the browser menu → **Install VakilMitra**.

Installing needs HTTPS. Each person signs in once on each device. On a weak connection the app still shows the last screens it loaded; saving needs a connection.

17 Lite and Pro

Edition	Users	What it includes
Lite	2	Free. Clients, matters, the hearing diary, the calendar with holidays, tasks, documents, the morning email and the core reports.
Pro	20	Everything in Lite, plus fees and invoices, drafting, e-sign, the client portal, document versions and sharing, all registers and reports, importing matters, client reminder emails, the evening email, the phone calendar feed, one-tap WhatsApp updates and conflict search.

Pro is a yearly licence, sold for 1 website, 3 websites or any number of websites. Every plan has every feature and up to 20 users per website; the plan only decides on how many websites the key works. The current prices are shown in the app (Settings → Edition, and the "You are on Lite" page) and on the store, gentlemansebooks.com.

In Lite, Pro screens are previews. Open any locked screen to see what it does with sample data, and how it would help with your own diary. **What Pro adds** (from the "You are on Lite" box in the menu) puts it all on one page: numbers from your own diary, every Pro screen as a preview, the plans with their prices, and Lite and Pro side by side.

Turning on Pro. After buying, the licence key arrives by email. The owner pastes it under Settings → Edition → Licence key and presses Activate. Pro is on at once; nothing is reinstalled and nothing moves. The same screen shows the plan, the date the licence runs to and how many of its websites are in use. To move the licence to another website, press **Remove from this site** there first, then activate it on the new site. Test and staging sites (such as `localhost` or `staging.yoursite.com`) do not use up a website.

Updates. While the licence is valid, new versions of VakilMitra appear on the normal WordPress Updates screen, like any other plugin.

If the licence expires. Pro keeps working; only updates and support pause until you renew (Settings → Edition → **Renew licence**). If the licence is not renewed for a long time, Pro screens may become read-only: everything can still be opened, printed and exported, but nothing new is saved there. If the licence is cancelled, the install runs as Lite. In every case the diary, the calendar, every record you entered and every export keep working. You are never locked out of your data.

If the site cannot reach the licence server (for example the host blocks outgoing connections), Pro stays on for a week; after that Pro screens become read-only until the licence can be confirmed again with **Check now**.

18 Settings reference

Tab	What you set
Firm	Name, line under the name, enrolment number, phone, email, address, GSTIN, PAN, bank and UPI, matter number prefix. Printed on reports and invoices.
Calendar	First day of the week, which holiday calendars show, holidays for another year.
Emails	Morning and evening emails, client reminders, test email, the scheduler.
Users, Roles and permissions	People and what they may do.
Lists	Courts, case types, stages, purposes of hearing, holidays and offices; starter data packs.
Edition	The licence key, your plan, and Lite and Pro compared with the current prices.
Advanced (owner only)	The switches below.

Advanced settings, explained

- **App address.** The part after your site address where the app opens, `app` by default (yoursite.com/app/).
- **Open the app on the site's home page.** *On:* anyone opening your site's address goes straight to the VakilMitra sign-in and then the app, instead of your WordPress home page. Use it when the site exists only for VakilMitra, for example desk.yourfirm.in. *Off:* your normal home page shows, and the app opens at its own address. Either way the app address keeps working.
- **Require two-step sign-in for everyone.** Everyone must add an authenticator app and enter its 6-digit code at sign-in. Recommended for a chamber holding client files.
- **Delete all data when the plugin is deleted.** Leave off. When on, removing the plugin from WordPress erases every record and stored document.
- **Public demo.** Only for a separate showroom site filled with the sample data; see the next section.
- **Starter data packs** (under Lists). Load ready-made courts, case types, stages and purposes for India or the United States. The India pack is loaded when VakilMitra is installed, so pressing Load on a new site usually says "Already loaded". It is safe to press again: anything already in your lists is skipped.

19 Public demo (showroom sites only)

The public demo lets anyone try VakilMitra without signing up. Use it on a separate website kept only for demonstrations, never on your chamber's real site.

When it is on:

- The site's home page becomes a VakilMitra product page with a **Show Me The Vakilmitra Demo** button. It replaces your theme's home page; the setting "Open the app on the site's home page" is ignored while the demo is on.
- The button signs the visitor in to one shared demo account and opens the app with the sample chamber.
- The visitor can open every screen, but cannot add, change, delete or export anything. They cannot see users or the audit trail, change the password or reach the WordPress admin area. A banner explains this and offers **Leave demo**.
- The sample dates move forward every day, so there are always hearings today, tomorrow and next week.
- Visitors see whichever edition the site runs; turn on Pro on the demo site so they see everything.
- Administrators can still see the theme's own home page by adding `?vm_site=1` to the address, and sign in as usual.

When it is off: the theme's home page is back, the demo button signs nobody in, and the demo account cannot be used.

Safety: the demo can only be switched on when every matter on the site is from the sample data. One real matter on the site and it refuses.

20 Security, privacy and your data

- **Your website, your data.** Everything is stored in your own WordPress database and uploads folder. Nothing is sent to VakilMitra or anyone else.
- **Access control** is checked on the server for every action, not just hidden on screen. Staff never reach the WordPress admin area.
- **Audit trail:** every addition, edit, deletion, permission change, export and sign-in, with who, when, from where and why. Entries cannot be edited, and **Verify integrity** detects tampering in the database.
- **Sign-in protection:** after 5 wrong passwords an account is locked for 15 minutes. Two-step sign-in can be required for everyone.
- **Encryption:** PAN and bank account numbers are stored encrypted and masked on screen.
- **Export at any time:** every list has an Export button that downloads a CSV file.
- **Backups:** VakilMitra does not back up your site. Turn on your host's daily backups (Hostinger: Websites → Backups) or use a backup plugin, and keep HTTPS on.
- **Data protection law:** India's Digital Personal Data Protection rules apply in full from 13 May 2027. VakilMitra helps with access control, logs and export, but the duties belong to the chamber: tell clients what you keep and why, keep your hosting secure, and report a breach.

21 Troubleshooting and common questions

/app/ shows "page not found". WordPress → Settings → Permalinks → Save once.

The morning email does not arrive. Press Send me a test email under Settings → Emails. If even that does not arrive, install an SMTP plugin. If it arrives but the morning email is late, add the cron job shown on the same tab.

I cannot find the Install option for the app. Open Phone app in the menu and follow the steps for your device. On iPhone, use Safari: other browsers on iPhone cannot install apps.

Starter data: I pressed Load and nothing was added. Everything in that pack is already in your lists; it is loaded when the plugin is installed.

A screen shows a lock. It is part of VakilMitra Pro. Open it to see a preview, or ask the owner about Pro.

Someone left the chamber. Settings → Users → edit the person → turn off Active. Their history stays; they can no longer sign in.

I deleted something by mistake. The owner opens the list, clicks Deleted items, opens the record and presses Restore.

How do I move from Lite to Pro? Enter the licence key under Settings → Edition; nothing needs reinstalling. New versions come through the WordPress Updates screen while the licence is valid, or upload a new zip under Plugins → Add New → Upload Plugin and choose Replace current with uploaded. Your data stays.

The licence says it is in use on too many websites. Remove it from a website you no longer use (Settings → Edition → Remove from this site), or from your licence account, then activate it again.

Does it give legal advice or list lawyers? No. VakilMitra is office software for advocates. It does not advertise lawyers or give legal advice.