Managing Cases and Documents

Manage Cases keeps every case you have with us in one place. Find a case, see its orders, download conformed copies and proofs of service, and start a new order on the case without typing the case details again.

Start here

LOG IN TO THE PORTAL →

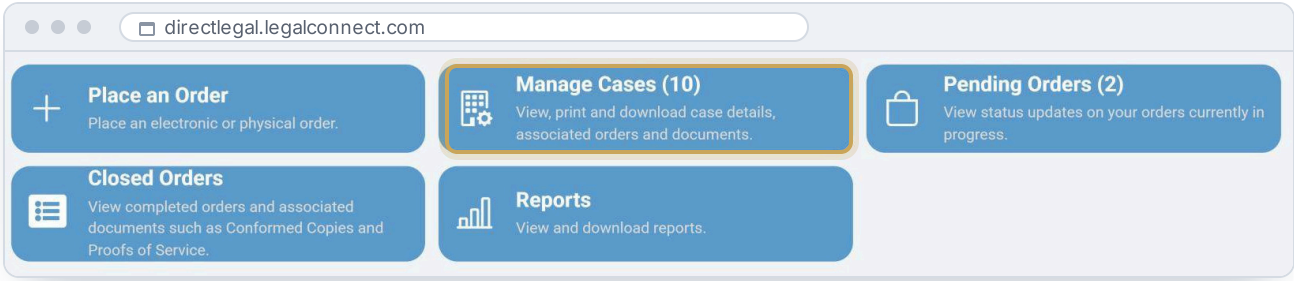
Or go to **directlegal.legalconnect.com** and log in with your email address and password. Use a current version of Chrome, Edge, Firefox or Safari.

What you will need

- Your email address and password
- The case name or case number you are looking for

1 Click Manage Cases

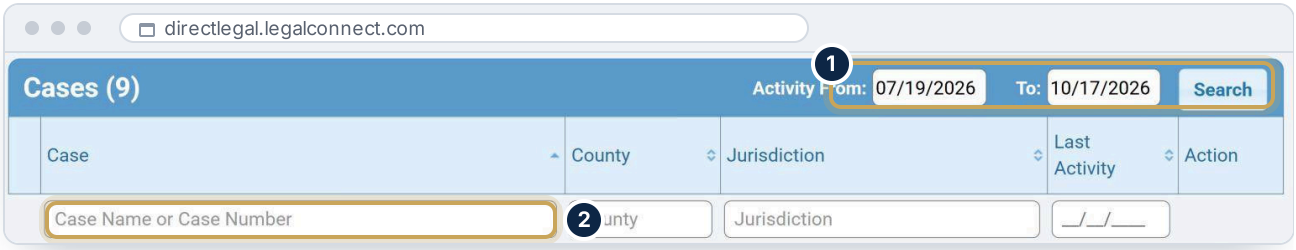
Log in to your account. On your dashboard, click **Manage Cases**.



Looking for an order: **Pending Orders** shows status updates on your pending orders. **Closed Orders** lists completed orders and their documents, such as conformed copies and proofs of service.

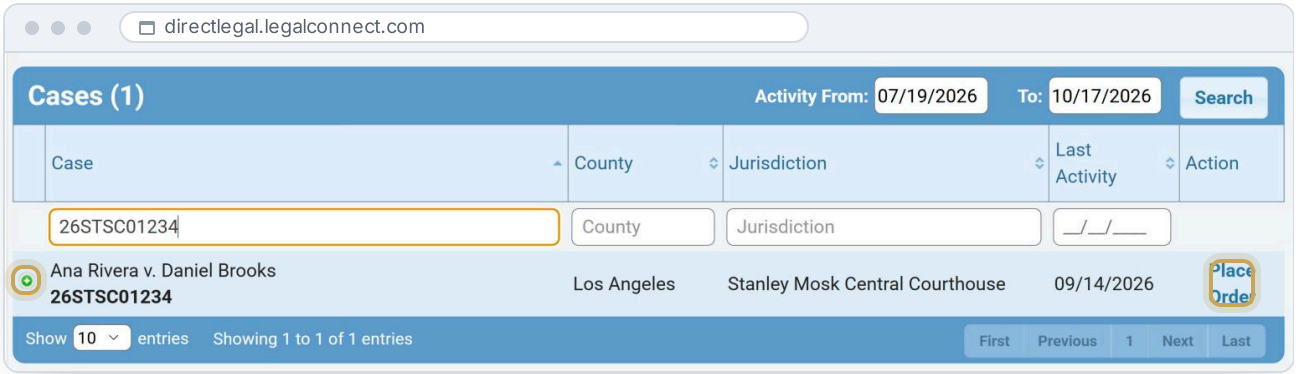
2 Find your case

The list shows the cases with activity between the **Activity From** and **To** dates, the last 90 days unless you change them (1). To find a case, type the case name or case number in the **Case Name or Case Number** box under **Case** and press Enter (2). You can also narrow the list by **County**, **Jurisdiction** or **Last Activity**.



3 Place an order or open the case

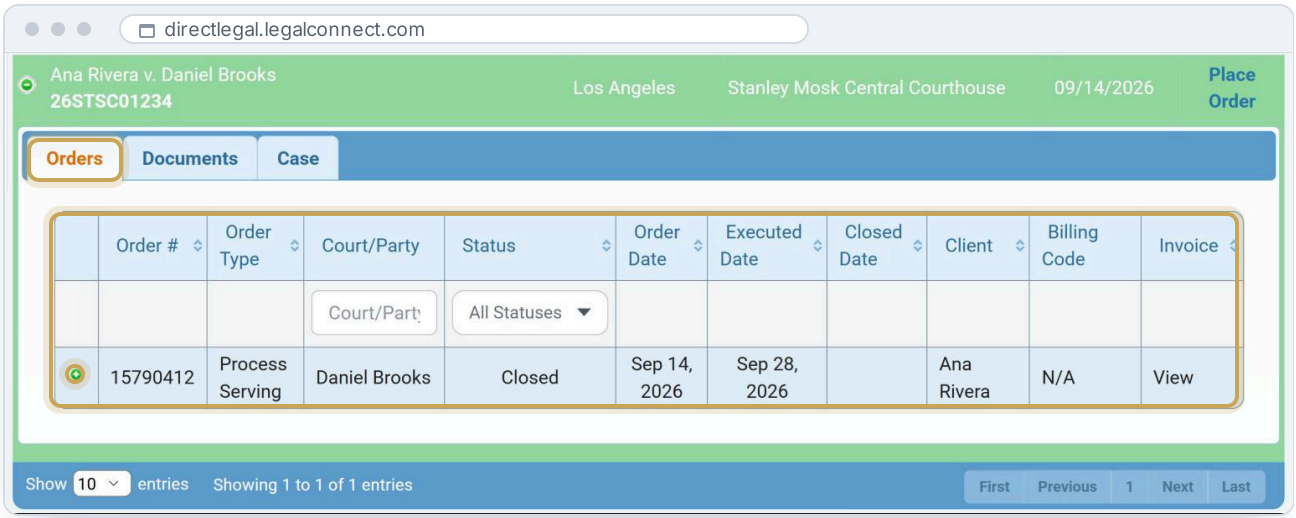
When your case appears, click **Place Order** to start a new order on this case without entering the case information again. To see the case's orders and documents, click the ⊕ icon next to the case name.



Inside a case

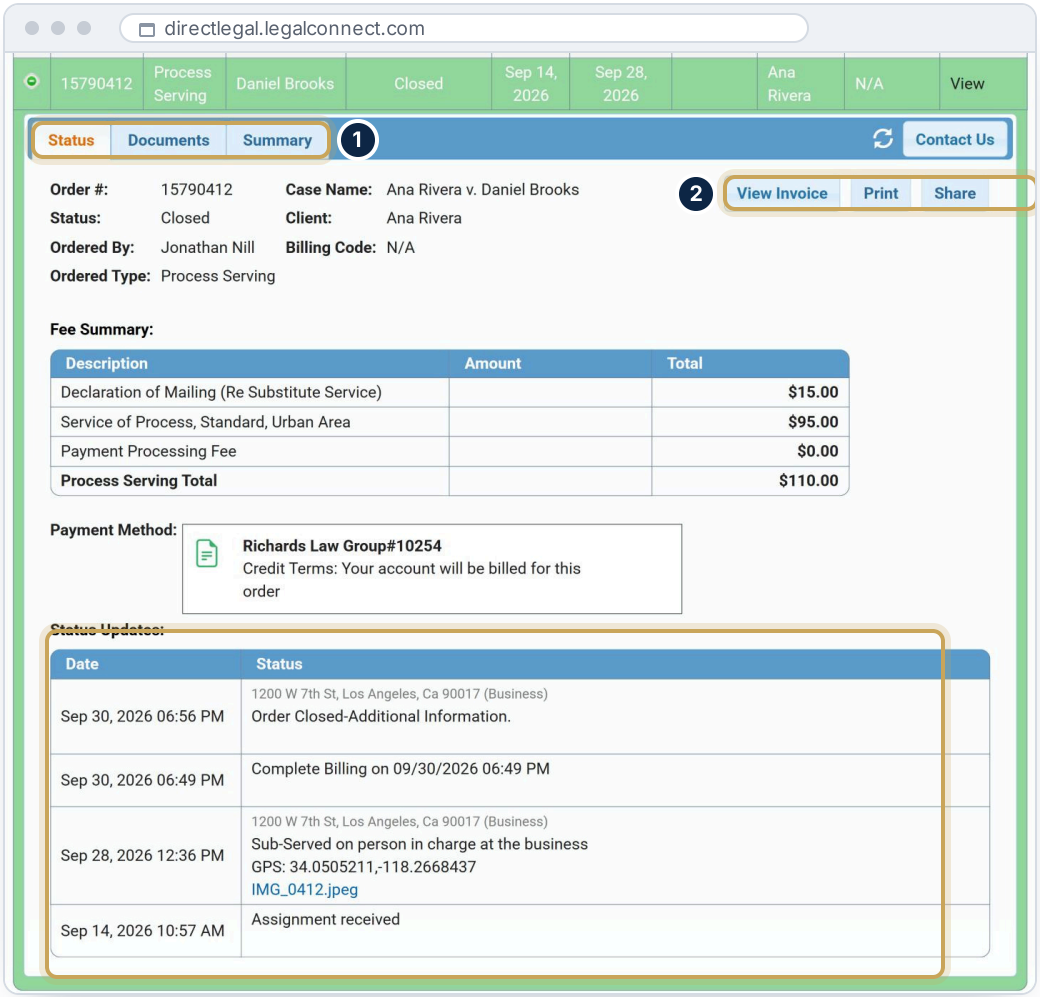
4 See the orders in the case

The **Orders** tab lists every pending and closed order in the case, with the order type, the court or party, the status, the order, executed and closed dates, the client and billing code, and a link to the invoice. Filter the list by **Court/Party** or **Status**, or click **View** under **Invoice** to see the invoice. Click the ⊕ icon next to an order to see its details.



5 Check an order's status

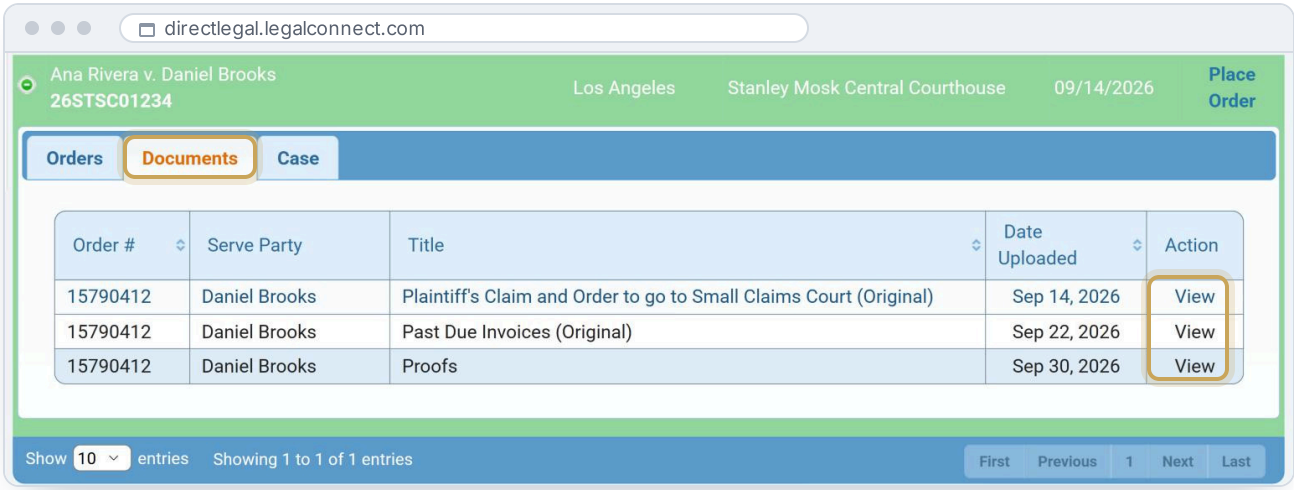
The order opens with **Status**, **Documents** and **Summary** tabs (1). The Status tab shows the order details, the fee summary and each status update with its date and time. Click **View Invoice**, **Print** or **Share** to see, print or send the order (2).



Questions about an order: Click **Contact Us** to email our customer support team about the order's status, the proof of service or missing documents.

6 View and download documents

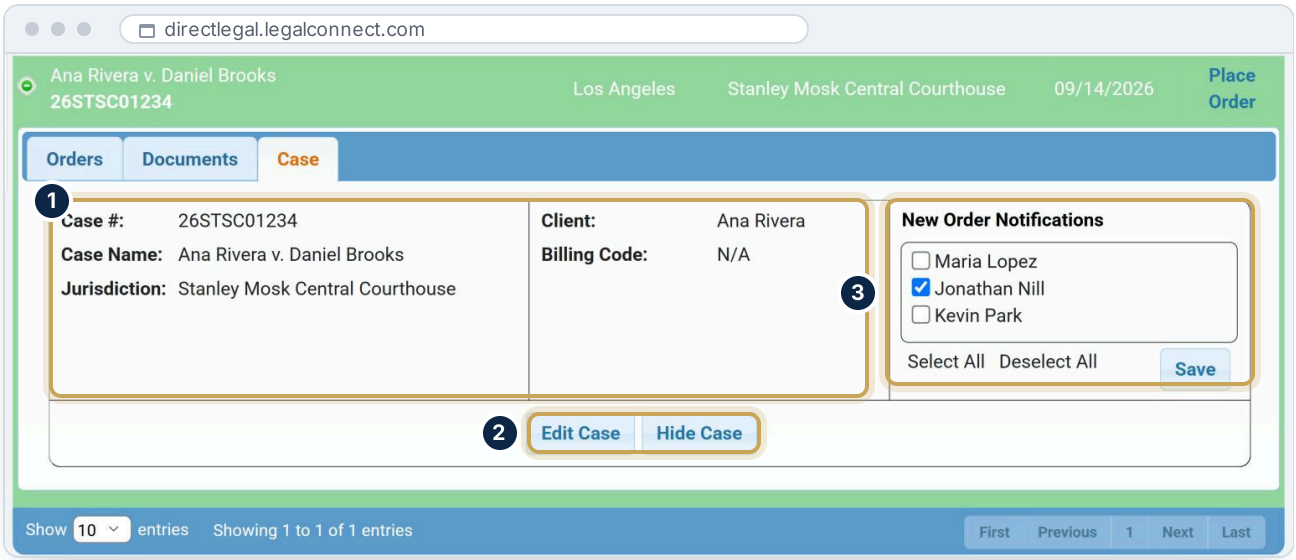
The **Documents** tab lists every document uploaded for the case, with the order number, the party served and the date it was uploaded. Click **View** to view, download or print a document, such as a conformed copy or proof of service.



7 Check or edit the case information

The **Case** tab shows the case number, case name, jurisdiction, client and billing code (1). Click **Edit Case** to change them (2). Under **New Order Notifications**, check the users who should be notified about new orders on this case, then click **Save** (3).

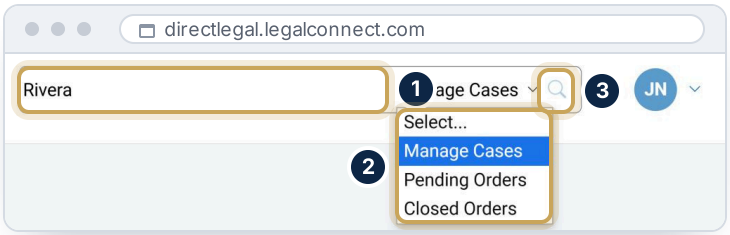
To remove a case from your list, click **Hide Case**. You can still find it with the search in step 8.



Find older or hidden cases

8 Search all of your firm's cases

The Manage Cases list shows cases with recent activity. To find a case with no recent activity, or one you hid, use the search bar at the top of every page. It searches your firm's entire database. Type the case name or number (1), choose **Manage Cases** in the list at the right of the box (2), and click the search icon (3). You can search **Pending Orders** and **Closed Orders** the same way.



Questions? We're here to help.

Call our Litigation Division Monday to Friday, 8:30 a.m. to 5:00 p.m. Pacific, or email info@directlegal.com. Ready to order? Log in to the portal.

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