LegalScout product manual for attorneys

Redacted public edition - 21 August 2026

Walkthrough of the attorney app, client portal, and associate subdomain. Tenant-specific names, contact details, live counts, screenshots, phone numbers, and secret links have been removed. This is not legal advice. Associates do not replace licensed lawyers.

How to use this manual

This book follows the attorney's job, not the sidebar. Open the door that matches the next thirty minutes.

If you have 10 minutes

Read How the system is put together, then Your first morning. You will know the nouns and whose ball it is.

If you have a live file

Part III - The file. Matters list -> open the matter -> next action -> Work with AI, tasks, documents, time, portal.

If you have a product to sell

Part IV - Getting paid. Orders first (accept work that is waiting). Then build or edit a product.

If you have an associate to launch

Part V - Your AI team. Associates, Call, Configure, widget embed. Check Configure before you click Create New Associate twice.

Setup (Profile, Data, Platform, Memory) is at the back of the book. You do not need it to work a file this morning.

A small Open admin dashboard control on the identity card is for LegalScout staff. Ignore it. Firm settings live under Configure and Profile.

How the system is put together

Four things to hold in your head. Everything else is a surface for one of them.

Associates are the AI agents your firm runs, not staff. Prospect associates are the public front - callers interview there, and they can present the products you assign. Active-client associates sit on the logged-in portal. Productized associates are internal matter assistants: they know the service and the matters on it. They are not a storefront.

Briefs are the record of those conversations. A new prospect, a follow-up, a dispatch - if an associate talked, it is a brief. New clients are one case of that, not the whole category.

Matters are the file. Ball in court, next action, tasks, documents, time, email, portal. This is the work surface.

Products are priced offerings you assign to prospect assistants so callers can choose them. A booking link is an optional deep link, not a separate host. Orders are sold products waiting on you.

The practice assistant is your attorney-side assistant. It has the file. It is not the client-facing associate. Home is the overview of all of this this morning.

Your first morning

Sign in at https://legalscout.net/dashboard

You land on Home: "Welcome back" and "Here's what needs your attention today." That is the loop.

1. Read the KPI tiles: Active Matters, Pending Tasks, Overdue, Your Ball. Two of them hand the list to the practice assistant instead of only filtering.
2. Open Your Ball - files whose next move is on you (tagged Attorney).
3. Scan Overdue on Home, or click that tile and let the practice assistant prioritize.
4. Open one matter. On Overview, take the next-action card: Review, Work with AI, or Mark Complete.

Part I - Today

An overview of the system - Home and what is waiting.

1. Home - KPIs, Your Ball, overdue, Calendar

Home is not a marketing dashboard. KPI tiles, Pending Tasks, and Your Ball are matter management. CourtListener is research. Memory recommendations are the learning queue. Dispatch buttons on tasks send the associate after the client.

Tile	What a click does
Active Matters	Opens the active-matter list
Pending Tasks	Ask the practice assistant to prioritize pending tasks
Overdue	Ask the practice assistant to prioritize overdue tasks
Your Ball	Opens matters waiting on you

Your Ball lists matters whose next move is on you (tagged Attorney). View All opens the full waiting-on-you set. Ball-in-court is first-class: Home shows your slice; the Matters list shows every party.

Pending Tasks is labeled "Next task in each matter." Each row has a title, matter, person, due date, an Overdue badge when late, pills such as Client / Initial Intake / Review / Dispatched, and a Dispatch to client button. Use that button when the next move is collecting facts, documents, or a time from the client.

CourtListener Updates

Empty state: "No CourtListener alert activity yet. Open a matter to get suggested docket or citation alerts." Monitoring is per-matter and opt-in, not a global firehose. Credentials and quota live on Platform. Use Refresh after you opt a file in. Add a docket with a CourtListener docket ID or URL (not PACER). Real-time alerts; optional import of RECAP PDFs. They land on the activity timeline.

Calendar

A live calendar with a provider chip when Google Calendar is linked. Controls: AI Booking, Sync, + New, and Month / Week / Day / List. This is a two-way calendar mirror - events created in Google appear here.

AI Booking opens Calendar Booking Settings: configure how the voice assistant schedules appointments. You enable booking per assistant, set working hours and working days, then Save Settings.

+ New -> New Event: Title, Start / End, Location (optional), Description (optional). Syncs to connected calendars.

Good to know. Recent Briefs on Home can show "No briefs match these filters" even when the firm has briefs. Use Show all briefs before assuming intake is empty. The Products sidebar badge is waiting orders, not catalog size.

2. Notifications

The bell opens a Notifications panel (not a separate page). Header: Notifications plus Clear All. Tabs: All, Calls, Consultations.

The bell can stay grey until notifications load, and on some pages (Matters, Products) it stays inactive. It is clickable on Home and Configure once the badge appears.

Type	What it means	Row action
Consultation brief ready	A written brief is ready	View Brief
New Matter Created	A file was opened	Open Matter, View Documents
Retainer Agreement Signed	A retainer was signed	View Document, Open Matter
Signature Document Sent	A signature packet went out	Review Signature Request

Dismiss one item at a time. This guide does not treat Clear All as a required step.

Part II - Briefs

Every conversation with an associate lands here. A new client is one case of that.

3. How they reach you

Prospects do not log into /dashboard. They meet the firm on a Prospect associate, a website widget, a booking link, or a branded firm subdomain (https://<firm>.legalscout.net). Products do not get their own public host. They are assignable and choosable on every prospect-facing assistant. The product assistant itself is an internal matter assistant - it has the details and the particular matters, not a service storefront.

Door	What the prospect sees	Where you set it
Prospect associate	Voice / chat on a subdomain or share URL - optional auth	Associates -> Share -> Copy URL
Website widget	Embed on the firm site; they interview in-page	Share -> Copy Embed, or Configure -> Widget
Booking link	Optional deep link to one product. The catalog still lives on the prospect associate.	Products -> Copy booking link

The prospect associate interviews and can present the products you assigned to it. It does not give legal advice and will not execute a retainer. You review the brief on Briefs.

The public front door is the firm site or subdomain with a Speak / chat widget and POWERED BY legalscout. Available Services sit below: flat-fee and subscription offerings they can click into. If voice fails, the same pane continues in text.

Widget embed variants: LegalScout Widget (recommended: hybrid voice/text, attorney live dossier), Data Attributes, and Native Vapi - each with Copy / Download. Apply the embed branding to the associate's subdomain after you change it.

Dispatch - sending the associate after them

Once someone is on a matter, Dispatch (matter header), Dispatch Associate (brief row), or Dispatch to client (Home task) opens Dispatch Associate. You pick a mission, then a channel.

Mission types include: Collect Documents, Sign Documents, Review Document, Follow Up, Schedule Meeting, Offer Service Engagement, Verify Information, Send Update, General Check-In, Custom Mission. Generate Link stays disabled until you pick one.

Channels: SMS Text, Phone Call, Email, and Copy Link, plus Custom Instructions. Pick how the client should be reached; do not assume a channel fires by itself.

Copy Link creates a time-limited dispatch URL. The UI tells you that manual notification is required. Copy the link and send it yourself. Do not paste secret link fragments into email, chat, or public notes.

1. Open the matter (or the brief / Home task) and click Dispatch.
2. Pick the mission that matches the next client move.
3. Choose SMS, Phone, Email, or Copy Link. Add custom instructions if needed.
4. If you Copy Link, notify the client yourself.

4. Briefs

Intake is the front door, not the product.

https://legalscout.net/dashboard/briefs

App subtitle: "Review consultations, call records, and structured intake data gathered by your associates."

Each row is one consultation: a typed field set (columns, configured per associate), a 7-part written summary, a quality / success score, a billing chip, and Dispatch Associate. Briefs are scoped per AI associate - switch the associate in the top bar first.

Columns are that associate's schema (name, email, phone, issue, location, and whatever you configured). QUALIFIED / NOT QUALIFIED chips on the row. Manage Fields adds columns.

View	Use when
Table View	Structured fields in bulk
Card View	One summary at a time
Map View	Geocoded intake (incident location)

How to review a brief

Clicking a row often lands you on Matters, not a standalone brief modal. View Brief from a consultation card goes to /dashboard/briefs?brief=.

Client Brief: Ask, Create Matter, Status, Assign To, pager. Summary + Case Details fill bar + transcript. Create Matter is the intake -> file handoff. Play recording lives on Card view.

Trust the transcript and the Case Details fields over a mismatched practice-area chip.

Walkthrough quirk. After a blank associate became the active assistant, Briefs showed "No briefs yet for this assistant" instead of the brief you clicked. Switch back to the associate that took the call.

1. Switch to the associate that took the call.
2. Scan metrics: Consultations, With Summary, With Evaluation, High Quality, Completion, Time / Avg, Avg Success (out of 10).

3. Read the 7-part summary - client profile, matter summary, key dates, case evaluation, client expectations, next steps, follow-up. Incomplete intakes are graded as incomplete. Associates are instructed that only an attorney can provide and execute a retainer.
4. Check the billing chip. You are charged for a qualified brief (a usable new-prospect intake). Unqualified calls are free. Follow-ups on an existing matter are not a new qualified brief. Work that rides a product order is billed as the service.
5. If a pending charge is wrong, use Click to dispute this charge before it processes before the window closes.
6. If facts are missing, Dispatch Associate instead of chasing the caller yourself.

Manage Fields opens the Data page (/dashboard/data) - the same schema designer as the sidebar item. Map view can render blank tiles on some tenants - use Table or Card until the Data map paints; that is a display quirk, not proof intake has no locations.

5. Consultations on a matter

On a matter, the Consultations tab is the file's intake and meeting record. Detected meetings come from Desktop Companion / meeting detection. ASR is raw - expect inaudible markers. AI Dispatch sessions are outbound associate missions that already completed, not a second brief list.

View Brief on a consultation navigates to Briefs with ?brief=. It does not open inline playback.

Part III - The file

The docket, the matter modal, documents, time, email, and the client portal.

6. Matters list

https://legalscout.net/dashboard/matters

The list is the docket: number and name, client, practice area, status, ball in court, next action, and a team count (people / AI / documents-or-messages). Productized work shows product chips. A matter opens as a large modal; the URL stays on /dashboard/matters.

Search and filters, the Clio Field Mapping strip (when Clio is connected), Assign activities, + New Matter, and the Ball in Court / Next Action columns. Ai as an owner is intentional.

Control	Options
Search matters...	Text search (can change Overdue/Urgent counts more than the table)
All Statuses	Intake - Active - On Hold - Resolved - Closed - Archived
All Responsibilities	Attorney - Client - Opposing Party - Court - Third Party
Due This Week / Overdue / Urgent	Quick toggles with live counts
View	List or By client

1. Start with Overdue and Urgent, or Your Ball from Home.
2. **Use All Responsibilities when you want "waiting on the client."**
3. Switch By client when one person has several product files.
4. Click a row to open the matter. Clear Assign N activities when desktop time is waiting to be hung on a file.

Assign activities. Amber Assign N activities - "Review desktop/passive activity that isn't tied to a matter yet." The Desktop Companion (Platform) is the on-device source. Rows may be tagged Auto-detected (Task completed, Document added, Consultation linked).

+ New Matter. Required: Matter Name, Client Name. Optional: Matter Number (auto if empty), Client Email, Client Phone, Practice Area, Opposing Party, Description. Buttons: Check for Conflicts, Cancel, Create Matter.

Clio Field Mapping. Collapsible mapping when Clio is connected. Platform -> Clio is the source of truth for whether Clio is connected. Custom (intake) fields map on Data; matter fields map here. Typical fields: Matter Type, Current Phase, Ball in Court, Next Action, Opposing Estimated Value, Jurisdiction, Court, Case Number, Target Completion Date, Billing Type,
Party,
Rate. Each row: Don't sync / Map to existing / Create new in
Hourly

7. Working a

Clio.

Header buttons: Dispatch - Call - Open Chat - pencil - X. Tabs: Overview - Consultations -
matter
- Documents - Timeline & Tracking - Email - Access. Floating Track time stopwatch. Add
Tasks
note and an Attorney chip.
internal

A productized file looks the same, with a Service link and a subscription or flat-fee chip. next action on Overview is what the client portal shows under Case
The

NEXT ACTION and Work with

Status.

The next-action card shows owner (Attorney / Client / Ai), step type, and buttons Work with AI
AI
Mark Complete.
/

Work with AI opens the practice assistant scoped to the matter, injects a task prompt, then tools (for example search_documents, draft_document). Edit any saved draft before you treat it
runs
as legal work. You do not re-explain the

task.

The ? on Matters opens the Matter Workflow Guide: how matters, consultations, emails, dispatches, documents, deliverables, and completion rules fit together. Operating principle: a
tasks,
matter is the live operational workspace.

Matter Actions menu: Generate Document, Client Portal Link, My Matters Link, Dispatch Assistant, Open in Chat, Add Note, Schedule Event, Send Email, Archive, Delete. Delete is destructive; this book does not walk it.

Generate Document on this menu is a free-form draft modal (path 2 below). It is not the product-template picker. Product templates merge from the Documents tab.

Access-tab portal controls are the ones to trust: Send Portal Access Email and View Client Portal Link on the Actions menu has been seen to copy a public firm domain rather than a
portal.
matter-scoped portal URL. Glance at the clipboard before you send anything.

8. Tasks, documents, and

Tasks. Views List / Kanban / Gantt, phase columns with open/total counts, and cards
time
status, step, and owner (Client vs Attorney). Actions: Add All to Calendar, Update Tasks,
showing
Create
+
Task.
AI prepares work; an attorney-review card ("Submitted - needs review") sits on that output. supervise; you do not re-do
You
Intake.

Documents. Header: Matter Documents plus a count. Group versions (checked by default). Filter dropdown. + Upload Document. Empty state: "No documents yet. Upload documents, or they'll appear here from dispatches and chat artifacts."

Filters include: All Documents, Engagement Agreements, Retainers, From Dispatches, Client Dispatches, From Client Portal, Client Drafted, AI Generated, Chat Artifacts, Manual Uploads.
Review

Path 1 - Merge a product template

Product-pack generation is on the Documents tab, not in the row Actions menu. Template Documents lists the product's pack (for example articles, operating agreement, guidance memos). Each row has a Merge button. Merging produces a document and may add Structured document review -> Pending Analysis with Analyze Pending.

Path 2 - Actions -> Generate Document

A modal drafts a free-form document. Types: Contract - Letter - Memo - Brief - Agreement - Motion - Pleading. Context toggles: Matter Info, Related Consultations, Related Documents, CourtListener case law, Custom Instructions.

The practice assistant still searches matter documents with version discipline: do not quote a superseded version without saying a newer one exists.

Timeline & Tracking. Left: time entries (Label, Detail, date, Hours, Amount, Code) plus Invoice template, Export CSV, Add entry, Track time. Right: activity timeline with Suggest billable time, filters, Search timeline. Dated entries can carry an AI badge.

Assign activities on the list and this tab are the same time story: Desktop Companion captures passively; you attribute it to a file here or in that modal.

9. Email, Access, and the portal

Email. A matter can show "Connect Your Email" even when Gmail or Microsoft 365 is Connected on Platform. Connect per matter, or use Actions -> Send Email (does not require this tab first). Connected Email is a matter-scoped search over the connected inbox (people, organizations, case numbers, docket numbers, date filter), not a separate mail client.

Access. Left: Internal Matter Team (never shown to the portal). Right: Client Portal Access - permissions badge, Send Portal Access Email, View portal.

Portal Permissions (saves automatically) include General Access, Case Information, Documents, Tasks, and Communication (chat with an assigned associate). Internal Matter Team: Firm member dropdown and Matter role Collaborator / Lead. Legacy owner keeps access by default.

Send Portal Access Email before you tell a client to look. View portal on a file whose invite was never sent can land on /portal/my-matters with no matters. A populated invite uses a time-limited client-portal URL. Do not publish secret link fragments.

The client portal can show: Attorney Working banner, Case Status (phase and next action), a subscription or product card with hours included / remaining when you allow hours in Portal Permissions, Case Progress, Updates, Your Documents, + Upload File, and the matter's product assistant (not the practice assistant). Change or cancel of a subscription is "contact your attorney," not self-serve cancel in this portal.

Part IV - Getting paid

Orders waiting on you, then the catalog and the create-product wizard.

10. Orders

https://legalscout.net/dashboard/services - Sidebar: Products

Title: "Your Products" - fixed pricing and guaranteed turnaround. The red sidebar badge is orders waiting on you, not catalog size. Stripe chip (when connected) shows the firm's Stripe account. Tabs: Orders and My Products.

Orders columns: Ready to Accept (payment secured - client waiting for you to accept), In Progress, and Awaiting Client. Cards show Accept & Create Matter, Approve & Activate Subscription, or Accept & Charge Card, plus Decline.

An opened order can show the client block, linked matters (or + Create matter), the consultation transcript, View Signed Agreement, and Modify Order / Create Payment Link / Decline. This is the file-before-the-file when a product order is not yet a matter.

Status filter: Ready / Payment Authorized - Pending Signature - Pending Payment - In Progress · Pending Review - Revision Requested - Delivered - Cancelled - Refunded. Order prefixes can differ by associate/brand.

Migrate existing customer. Fields: Client name, Client email, Phone (optional), Subscription service, Price at migrate, Matter name (optional), Legacy Stripe subscription ID (optional), Notes, toggle Send portal invite email now. Soft migrate can leave billing on a prior processor.

1. Open Products. Work Ready to Accept first.
2. Use the accept action that matches the product: Accept & Create Matter, Approve & Activate Subscription, or Accept & Charge Card. Decline leaves the work unopened.
3. When you are ready to take work, pick the accept action that matches the product type.

11. Building a product

My Products KPIs: Active Products, Total Completed, Avg Effective Rate. Groups: General Products (public) and Private Dispatch-Only Products. Columns include Price, Payment (for example Authorize Before Work), Turnaround, Assistant (the internal matter assistant for that product). Row icons: Configure, Copy booking link, visibility, Deactivate, Delete. Prospect

Pricing models: Recurring Subscription - Flat Fee - Stakes-Based ("Priced by what's at stake"). Payment timing: Authorize Before Work Starts - Collect After Work Is Ready - Collect at Milestones (Stripe Connect).

Creating a product with behavior instructions creates that product's internal matter associate automatically. Prospect assistants present the products you assign to them. Wizard tabs: Setup - Economics - Terms - Associate - Product Knowledge.

Create from existing agreement (upload a retainer - the practice assistant drafts the product) or from starter templates (one-time, subscriptions, custom).

Product Setup: Name, category, description; Recurring / Flat / Stakes; Service Price; Workflow Type (platform fee band); payment timing; Deliverables; Scope Boundaries; Standard Legal Exclusions; Additional Costs; Conflict Check / Engagement Letter required; Service Inactive.

Economics: Traditional hourly versus productized flat fee; Net Effective Rate; turnaround guarantee; revision policy; billing protection.

Terms: Auto-generated Limited Scope Engagement Agreement. A LegalScout-locked section covers platform liability / non-party. Firm and parties resolve from Profile.

Part V - Your AI team

Associates you put on the phone, the practice assistant you work with, and the widget clients see.

12. Associates

https://legalscout.net/dashboard/assistants

Associates are the AI agents your firm runs - not a human staff directory. Three tiers match the client lifecycle. A plan card at the top-right shows the current plan, a
engagement
consultation counter, and Choose

Tier | Auth |
Plan.

Prospect Engagement | Optional | Public intake - previous consultations, e-sign retainers
Job
Active Client | Required | Logged-in portal - assign to matters, status, notes,
assistance
AI
Productized Services | Internal | Matter assistant for that service - service details plus the matters on it. Not a public intake host.

Per-card: Share, Edit, Call, Delete; stats Total Calls / Total Duration / Avg Duration / Last Days. Quick Actions: 1-Click Website Import and Create New
7
Call. Assigned LegalScout or imported Twilio number. Outbound: number + keypad, Caller ID
Associate.
assigned number, Call Now. Matter Call -> AI Assistant places the call immediately (no separate keypad confirm). Confirm before you click it. Ended calls log to the matter activity timeline.

Quick Actions - read this before you click. 1-Click Website Import: one field for the firm plus Import (disabled until filled). Create New Associate is not a safe preview. In some passes
site
the button did nothing; in others it immediately created a blank associate and routed to Configure with no confirm step. Check Configure for a new blank associate before you click twice.

13. The practice

Present on every attorney surface. Docked panel: Minimize / Maximize / Close. Left rail:
assistant
- Chat - Artifacts.
History
Page-aware: on Home it offers Show overdue items / Summarize today's priorities; on What needs my attention? / Summarize overdue matters / Find a matter.
Matters,
Group |

FIND | Consultations, Caselaw, Web, Emails,
Tools
ANALYZE | Contract, Table, Extract, Citations, Timeline, Entities,
Documents
DRAFT | Document, Email
Redline
ACT | Send, Schedule, Calendar, Save, Share
AUTOMATE | Task,

Composer hints: # workflows - @ contacts - / consultations - * artifacts - % matters.
Workflow
files. Matters scope picker. Connect integrations. Wake word (Scout) off until you enable
Attach
Maximized header: assistant name, role (Lead Counsel and specialists), Delegate, Roundtable,
it.
Workflows, model.

Voice modes (on a live matter): Quick Voice, Compose, Live Chat, Meeting Assistant. The word is Scout. The chip can toggle on while the mic stays blocked until the browser
wake
legalscout.net.
allows
Roundtable. Multiple roles deliberate read-only, then Lead Counsel recommends next steps. Roles include Legal Researcher, Drafting Counsel, Matter Manager, IP / Trademark, Intake / Litigation Analyst. Presets: Build a matter strategy / Clear a trademark / Prep a client
Client.
response / Review a document.

Trust the pages, not the practice assistant's map. Asked to walk Data and Platform, it can invent an information architecture that does not match the live app. It can also list an integration as disconnected while Platform shows Connected. Use the practice assistant to do work on a file. Do not use it as the map of those two pages.

14. Configure and the widget

https://legalscout.net/dashboard/configure

Scoped per associate (same kind of switcher as Briefs). Left: settings. Right: live Portal Preview. Tabs: AI Associate - Subdomain - Widget.

Observed fields: Associate Name + button image; Client Engagement Tier; Associate Subdomain with Share & Embed (Copy URL / Copy Embed); Enable Productized Services (makes assigned products choosable on this prospect associate); Associate Phone Number (Create LegalScout Number / Import from Twilio); Call Forwarding Rules. AI Associate: system instructions (compiled from the product for that internal matter assistant - SERVICE / BILLING MODEL / DELIVERABLES / SCOPE BOUNDARIES / GUARANTEES), First Spoken Message, Voice Selection (realtime gateway), Voice Style/Accent, follow-up email prompts, Documents (knowledge/template + signature), Refresh Preview, Sync Assistant Configuration, Full View.

Embed Code Options: three variants with Copy/Download and script / React snippets. The block also emits AI-discovery meta (MCP endpoint, firm tag, schema.org LegalService). Apply to head the subdomain after you change colors or the associate.

Widget Settings include Appearance (brand and accent, backgrounds, chat bubbles, text, transparency, typography, shape); Layout & Size (position, button size, panel size, fullscreen); Display Text; Interaction & Features; Compliance & Actions.

Part VI - Setup (back of the book)

Do this once. You do not need it to work a file this morning.

15. Profile, team, plan

https://legalscout.net/dashboard/profile

Your firm and user settings - not the LegalScout staff console. Fill Practice Information before you launch a public associate; new assistants inherit defaults from here.

Section	Fields
Practice Information	Firm Name; Practice Areas (multi-select); Save Practice Info. Practice description and firm name are defaults for newly created assistants.
Attorney Info	Attorney Name, Bar ID, Licensed State, Phone; Email from sign-in (read-only)
Firm Info	Street Address, Suite/Unit/Apt (optional), City, ZIP Code
Team & Plan	Team & Access -> Manage Team; Plan -> review plan, billable users, pricing path
Bug reporting	Optional floating bug button on dashboard, dispatch, and associate pages

Manage Team. Roles: Owner, Admin, Attorney, Staff. Invite is email + role; the teammate signs in with that email to claim access. Owner membership is protected. Per-member: Apply Role, Suspend, Permissions, Delete. A Danger Zone with delete-account exists. This book does not walk it.

Choose Plan (attorney-visible ladder)

From Associates -> Choose Plan, or Profile -> Plan. This is the attorney-visible ladder - not an internal admin table. Platform billing is separate from product checkout. Test / Pilot toggles are reporting flags, not billing.

Plan | As shown

Trial | $0 - limited consults, matters, and seats
Pay as you go | Per qualified brief - additional active-matter fee - no monthly platform fee
Practice | Monthly platform fee - included briefs - overage
Practice Plus | Higher monthly fee - more included briefs - lower overage - often marked Recommended

Exact dollar amounts on the live Plan page are the source of truth and can change. This public edition does not reprint a tenant's usage meters.

16. Data - intake field schema

https://legalscout.net/dashboard/data

Title: Data Collection & Analysis. This is the schema behind the Briefs table - not a warehouse. Banner: analysis prompts are synced with your assistant's active settings. Briefs -> Manage Fields lands here.

Custom Fields: Internal key + display label + description + type (Text, Email, Phone, Dropdown, and others). Required toggle, Live Summary, Clio sync (No sync / Map / Create). Apply AI Template from a practice-area list. These keys become Briefs CRM columns.

Analysis Configuration: three prompts (Summary, Success Evaluation, Structured Data). Success Evaluation is the source of Avg Success on Briefs. Advanced Options reveals a JSON schema.

Field types include Text, Email, Phone, Date, Long Text, Dropdown, Multi-select, Yes/No, Integer, Currency, Percentage, Decimal, Contact, Address, Document Checklist, Timeline Event, Rating, Document Upload, Photo Upload. Do not inherit a personal-injury schema onto a family-law or M&A associate.

17. Platform

https://legalscout.net/dashboard/tools - Sidebar: Platform

"Firm documents, integrations, and LegalScout apps - not tied to a single matter." Three groups: Documents, Integrations, LegalScout. Stripe stays on Products. Voice and widget stay on Configure. Trust this panel over the practice assistant's integrations table.

Integrations may include Google & Microsoft (Gmail / Calendar / Drive; Outlook), Clio Practice Management, CourtListener credentials and meters, USPTO. When Clio is connected: Auto-sync Contacts, Matters, Phone Logs; destination Manage / Grow / Both; backfill unsynced consultations and matters. Custom Fields -> Data; Matter Fields -> Matters.

LegalScout apps: Memory (private beta), Claude & ChatGPT connector (MCP at https://legalscout.net/api/mcp), Desktop Companion (meeting notes, Meeting Assistant, floating timer, passive billable time - the source of Assign N activities).

18. Memory

Private beta. Open from Home -> Memory recommendations, or Platform -> Open Memory. Modal: "Shape what your assistant should remember about how your firm works, what it knows, and what it learns over time." Scope: Firm-wide | Personal. Tabs: Browse - Health - Settings - Add - Imports - Entities - Review.

On first open the banner can flash "Memory unavailable" and then flip to Memory ready. Wait a moment. Entities tab counts can lag until the graph loads.

Browse category chips: How We Work, Firm Knowledge, Past Interactions, Preferences, Learned Patterns. Settings cover personal capture / use / auto-capture and firm shared memory, review-before-use, imports, retention, legal hold. Entities are conflict-indexed (clients, opposing parties, witnesses, insurers, counsel, referrers) with emails hashed and phones last-four only. This book does not walk Approve or Dismiss all.

Appendix

Typical workflows

Prospect -> brief -> matter

1. They talk once - widget, subdomain, phone, or a Call you placed.
2. Briefs: switch associate, read the summary, check qualified / not qualified.
3. Missing facts -> Dispatch Associate (mission + channel). Copy Link still needs you to notify the client.
4. Open or create the matter. Overview -> next action.
5. Set Access before you invite anyone to the portal.

Product -> order

1. Share a booking link or let a prospect associate present General Prospect Products.
2. Client authorizes (and signs if required). Order moves Awaiting Client -> Ready to Accept.
3. Accept with the action that matches the product. The file opens with the product attached.
4. AI drafts; attorney-review tasks are your gate.

Morning triage

1. Home -> Overdue or Your Ball.
2. Products -> Orders -> Ready to Accept.
3. Memory recommendations if the count is non-zero.
4. CourtListener Updates if litigation files are opted in.

Work with AI

1. Open the matter. Click Work with AI on the next-action card.
2. Watch the tool trace. Connect a missing integration on Platform - do not accept a guess.
3. Edit the draft. Mark the attorney-review task complete only after you would sign the work.

Good to know / quirks

- The practice assistant invents a Data/Platform information architecture that does not match the live pages. Trust the screens.
- When Clio is connected on Platform, believe Platform even if the practice assistant lists it as not connected.
- Home -> Recent Briefs default filter can look empty. Use Show all briefs.
- Briefs Map view can render blank tiles.
- Create New Associate can create immediately or appear to do nothing. Check Configure before clicking twice.
- View portal on an uninvited file can land on empty /portal/my-matters. Invite the client (or send a time-limited portal link) first.
- The practice assistant microphone stays blocked until the browser allows legalscout.net. The wake word Scout toggles; listening does not start without that Allow.
- Matter Call -> AI Assistant dials immediately. Confirm before you click it.
- Client Brief can show a practice-area chip that does not match the transcript. Read the transcript and Case Details fill bar.

- Matter Email can still say Connect even when Platform Gmail is Connected. Connect per matter or use Actions -> Send Email.
- Dispatch Copy Link creates a time-limited URL and says manual notification is required. Do not paste secret link fragments.
- Client Portal Link on the Actions menu has been seen to copy a public firm domain. Prefer Access -> View portal / Send Portal Access Email.
- The Home help guide mentions a Phone page that is not in the sidebar.
- Memory can flash "unavailable" then "ready." Entities counts can lag.
- Matters search may change Overdue/Urgent counts without filtering the table.

Short glossary

Term | Meaning

Brief | A scored consultation record: typed fields + 7-part summary from an associate interview.
Qualified | A usable new-prospect intake you are charged for. Unqualified / test calls are not.
Ball in court | Who owes the next move - Attorney, Client, Ai, opposing party, court, or third party. a
Associate | An AI agent your firm runs. Prospect (public intake), Active Client (logged-in portal), or Productized (internal matter assistant for a service). Not a human hire.
Practice assistant | Your in-app attorney assistant. Page-aware. Different from client-facing associate. Scout is only the voice wake word you can enable to activate it. o
Dispatch | An outbound mission you send the associate on (collect, sign, follow up, ...) via SMS, phone, email, or link.
Product | A scoped, priced legal offering (flat, subscription, or stakes). Assigned to prospect assistants so callers can choose it. Has an internal matter assistant. A booking link is optional, not a separate host.
Stakes | A pricing model based on what is at stake, not only hours.

The line that does not move: AI does not practice law. You approve; the associate executes. Associates will not issue a retainer or give legal advice. Follow-up emails are written so they do not pretend the caller spoke with you unless the transcript shows that.

Related machine-readable files: https://legalscout.net/docs/product-manual - https://legalscout.net/developers - https://legalscout.net/llms.txt - https://legalscout.net/api/mcp