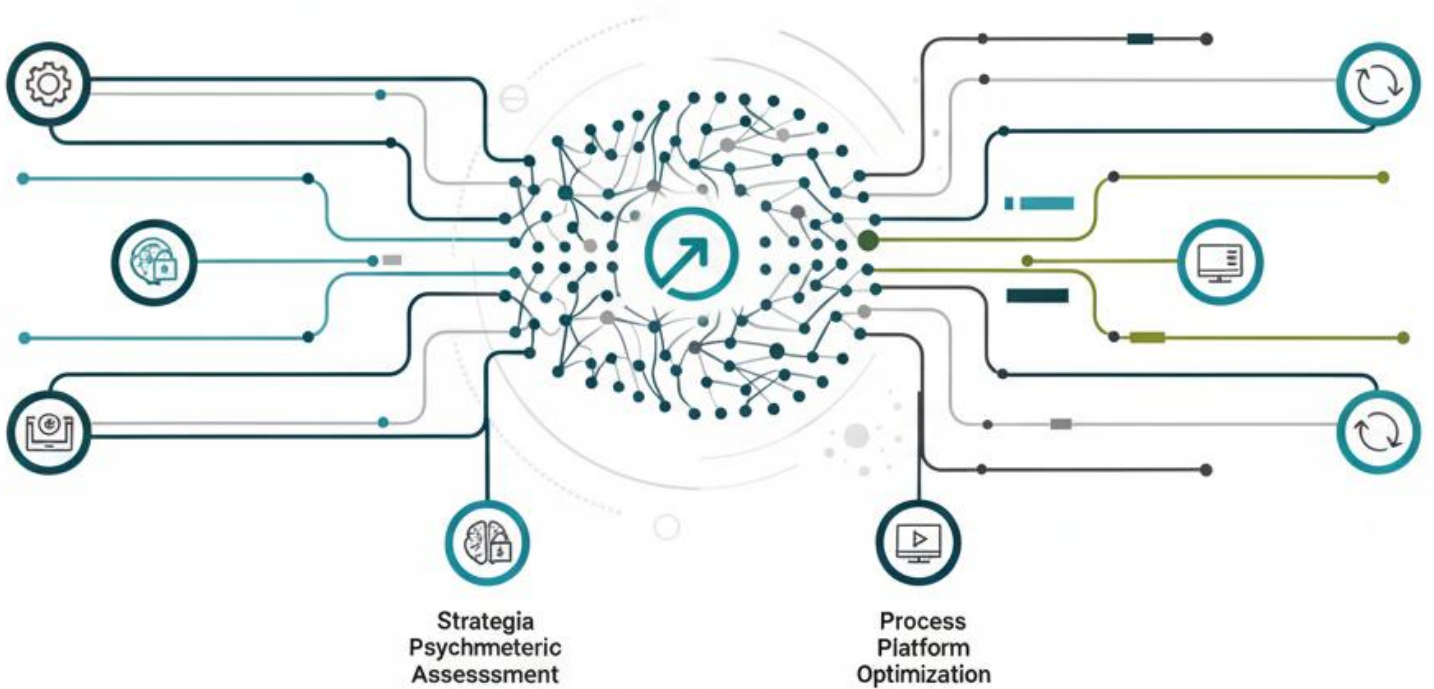


VisionJuris: The Intersection of Law and Intelligence



Customer Guide (For law firms, attorneys, paralegals, and clients)

1.1 Executive summary (customer)

VisionNext is an AI-powered paralegal and practice management platform built for South African law practices. It combines legal research, automated document drafting, matter tracking, calendaring, POPIA-compliant storage, client portals, and billing — all in one app. The Starter plan begins at **R750 / firm / month** for micro-practices and solo attorneys.

1.2 Who should use VisionNext

- Solo practitioners who need a cost-effective paralegal assistant.
- Small firms (1–10 lawyers) that want to automate admin and improve turnaround.
- Medium firms (10–50) that want analytics, predictable workflows, and compliance tracking.
- Legal support teams that need centralized document versioning, e-signing, and secure client communication.

1.3 Core customer-facing features (what you will actually use)

Each feature below explains user actions and expected result.

A. Legal Research (SA focus)

- **What it does:** Instant search across statutes, regulations, court judgments, and annotated precedents relevant to South African practice.
- **How you use it:** Type plain-language queries like “case law on prescription – consumer credit” or “elements of unlawful arrest in SA” and get concise summaries plus cited case law and links to full texts.
- **Deliverables:** Short legal memo, list of cited authorities, recommended next steps, suggested wording for pleadings.

B. Document Studio

- **What it does:** Template-driven drafting — fill client/matter fields and generate pleadings, affidavits, letters of demand, contracts.
- **How you use it:** Choose template → upload facts or paste a brief → AI drafts a first pass → you edit → finalize & e-sign.
- **Advanced:** Clause library, clause-reuse, boilerplate management, version compare.

C. Case & Deadline Management

- **What it does:** Central matter pages with timeline, docket, deadlines, and court date sync.
- **How you use it:** Create a matter → add parties, opposing counsel, deadlines → tasks created automatically from templates (e.g., “serve notice 14 days before hearing”) → calendar & reminders.
- **Escalations:** If a deadline is missed, the system triggers escalation e-mails/SMS based on firm rules.

D. Client Portal & Secure Messaging

- **What it does:** Clients can log in, view status, upload documents, and receive privileged messages.
- **How you use it:** Invite a client to a matter → client sees redacted documents, messages, and upcoming court dates → two-way secure messaging replaces insecure email.
- **PI / Security:** All document transfers are encrypted; privileged threads marked and only visible to permitted roles.

E. Multilingual Support

- Interface and client communications available in **English, Afrikaans, Zulu, Xhosa, and Sotho**. Documents can be generated in any supported language (subject to translation checks).

F. Automated Notifications & Communications

- Email, SMS (Plivo), and in-app push notifications for filing confirmations, calendar reminders, completed drafts, payments, and compliance prompts.

G. Finance & Trust Account Monitoring

- Matter-based time tracking, invoice generation, trust deposit tracking, reconciliation warnings, export to QuickBooks/Sage/Xero.

H. Compliance & CPD (firm-level)

- POPIA controls, audit logs, and a CPD tracker for attorneys to log their continuing professional development activities.

I. Document Intelligence (added value)

- Contract clause risk flags, “novice vs. expert” readability checks, redline comparison, and automated grammar & legal style review.

1.4 Customer journeys / use cases (detailed examples)

Use case 1 — Solo attorney (family law)

- **Problem:** One lawyer handles intake, research, drafting, and court attendance.
- **Flow:** Intake form → VisionNext extracts facts → generates a first-draft affidavit → lawyer edits & approves → sends to client for e-signature → files document and schedules hearing.
- **Impact:** Reduces drafting time by ~60%, faster intake, improved client transparency.

Use case 2 — Small litigation firm

- **Problem:** Missed deadlines and inconsistent templates.
- **Flow:** Create matter → select litigation template → system auto-populates tasks (discovery deadlines, filing windows) → RAG-powered research returns precedent suggestions → confirms filings → automated reminders to paralegal and attorney.
- **Impact:** Fewer missed deadlines, better compliance, auditable trail.

Use case 3 — Medium practice (commercial contracts)

- **Problem:** Manual contract reviews and slow turnaround.
- **Flow:** Upload contract → VisionNext performs clause extraction & risk scoring → highlights non-standard clauses → junior drafts changes → senior reviews → final contract exported and signed.
- **Impact:** Faster turnaround, consistent risk flags, lower external counsel spend.

Use case 4 — Client-facing experience

- **Problem:** Clients demand transparent updates.
- **Flow:** Client portal shows matter timeline, document uploads, invoices and next steps. Client can pay online via integrated payments.
- **Impact:** Higher client satisfaction, fewer billing disputes.

1.5 Pricing & packaging (what you pay and why)

- **Starter** — R750 / firm / month (1–3 users)
 - 10 GB storage, 20–30 AI drafts/month, basic templates, client portal, POPIA storage.
- **Professional** — R3,000–R5,000 / firm / month (4–10 users)
 - Unlimited drafting, 50–100 GB storage, e-sign, accounting integration, multilingual features.
- **Enterprise** — R10,000+ / firm / month (10+ users)
 - Predictive analytics, full API access, dedicated support, unlimited storage.

Important: Starter restrictions (AI token limits, storage caps, and feature gating) keep the R750 price viable. Overage pricing for extra AI usage: e.g., R200 per additional 100k tokens (example – tune for actual costs).

1.6 Onboarding & support

- **Self-service onboarding** for Starter (knowledge base + videos).
- **Assisted onboarding** for Professional (setup call + migration help).
- **Enterprise** includes dedicated onboarding, SLA, and optional on-site training.

1.7 Data ownership, privacy & compliance (what clients need to know)

- **Data ownership:** Customer retains ownership of client matter data.
- **Data residency:** Option for SA-hosted tenancy for POPIA compliance.
- **Encryption:** TLS 1.3 in transit, AES-256 at rest.
- **Access controls:** RBAC, 2FA recommended.
- **Breach notification:** 72-hour notification procedure aligned with POPIA best practice.
- **Retention & deletion:** Admins can set retention policies per matter.

1.8 KPIs clients see (how they benefit)

- Reduced drafting time (minutes per document).
- Deadline compliance rate.
- Billing realization (time captured vs billed).
- Client satisfaction scores (CSAT).
- Matter cycle time (open → closed).

1.9 Frequently asked questions (FAQ)

- Q: “Is my client data private?” → A: Yes; encrypted, RBAC, opt for SA-hosted tenancy.
- Q: “Can I migrate old documents?” → A: Yes; assisted migration available for Professional & Enterprise.
- Q: “What if I need a custom template?” → A: Professional/Enterprise include custom template creation.
- Q: “How is AI trained?” → A: RAG on SA legal corpus + prompt engineering; no private client data is used to train shared models unless opted in for improvements.