



D365 LEGAL HUB

QUICK START GUIDE

Getting Started

Accounts, Contacts and Matters

Navigate • Accounts • Contacts • Matters



d365.Global

Purpose of this guide

A short introduction to Legal Hub and its three core records.

What this covers

Opening **Legal Hub**, finding your way around, and creating and reading **accounts**, **contacts** and **matters**.

Who should use it

Lawyers, paralegals and **support staff** who are new to Legal Hub.

Recommended process

Set up the **client** first, as an **account** or **contact**, then open the **matter** for their work.

Important: a matter needs a **client**. Create the account or contact before you create the matter.

01

Open Legal Hub

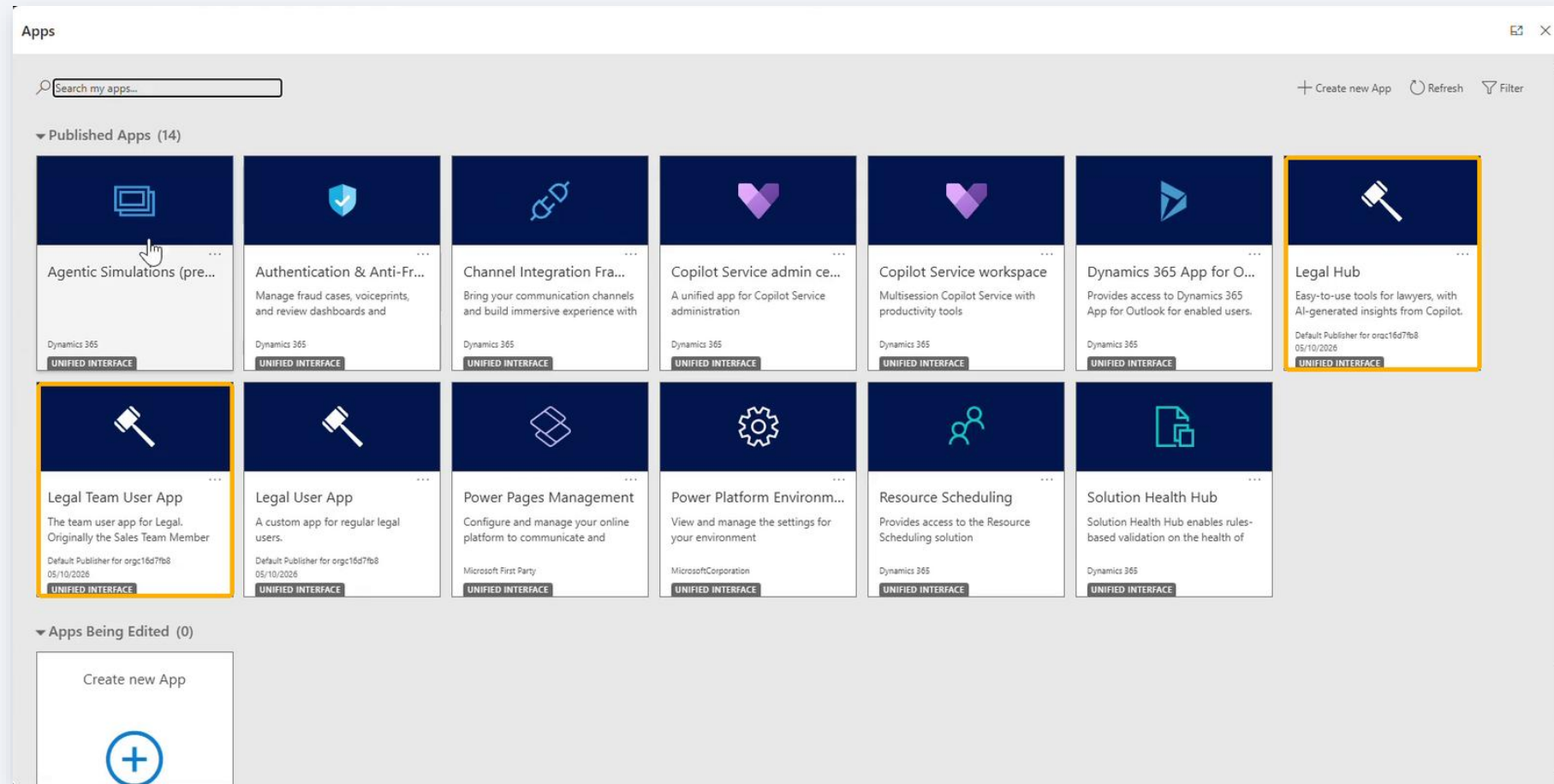
Choose the **Legal Hub** app from the app selector.

Steps:

1. Sign in with your **work account**
2. Click the app name at the top left to open the **app selector**
3. Click **Legal Hub**

Note: Team members see the Legal Team User app. Full admins see every app.

Legal Hub is built on Dynamics 365. The apps you see depend on your security role.



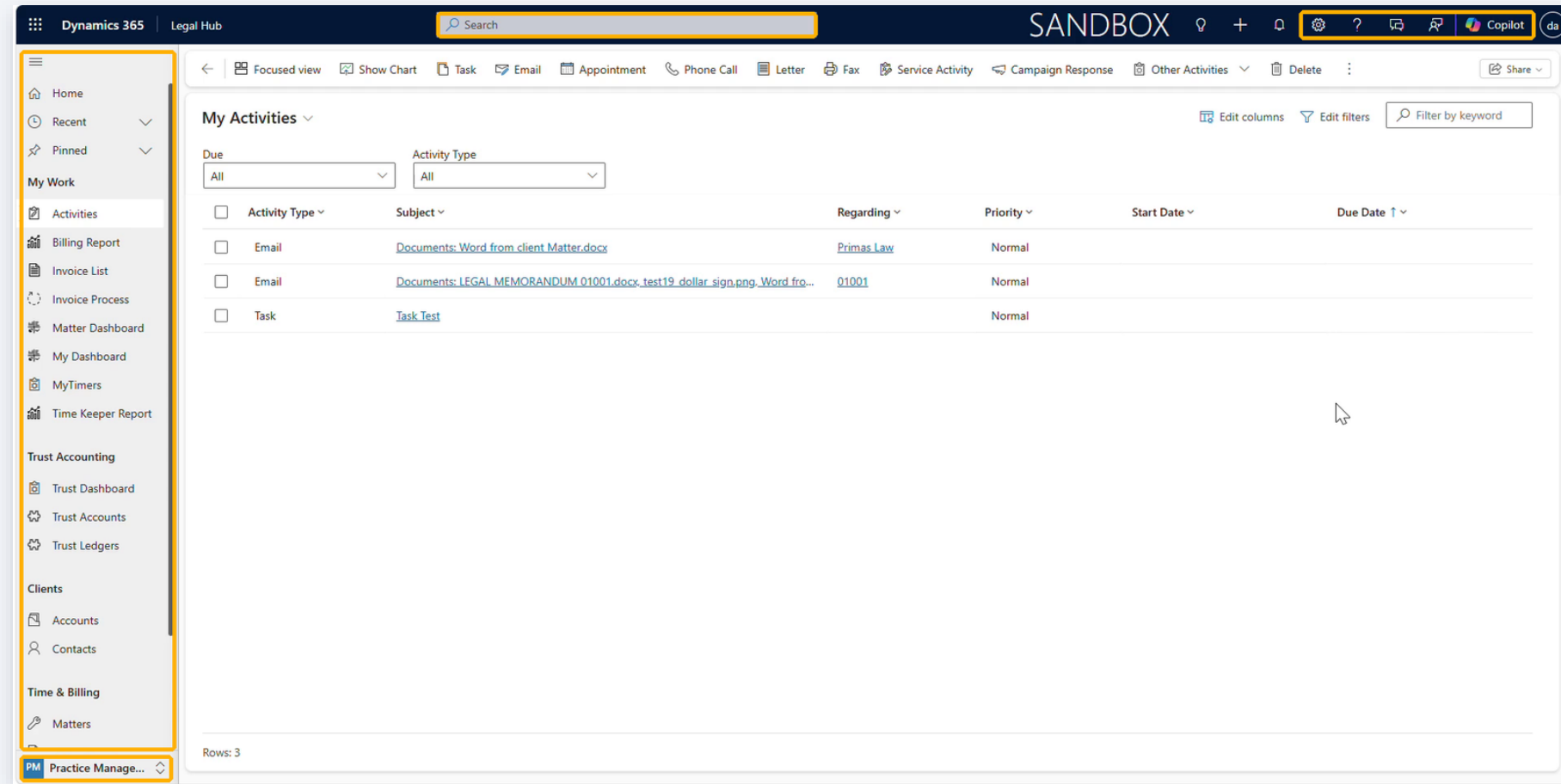
Find Your Way

Everything starts from the **left navigation**.

Steps:

1. Click a page in the **navigation pane**
2. Switch between **Admin** and **Practice Management** with the **area selector**
3. Use **global search** at the top to find any account, contact, matter or ledger

The navigation pane lists your pages. Whatever you click opens in the workspace on the right.



Navigation Pane (Left):

- Home
- Recent
- Pinned
- My Work**
 - Activities
 - Billing Report
 - Invoice List
 - Invoice Process
 - Matter Dashboard
 - My Dashboard
 - MyTimers
 - Time Keeper Report
- Trust Accounting**
 - Trust Dashboard
 - Trust Accounts
 - Trust Ledgers
- Clients**
 - Accounts
 - Contacts
- Time & Billing**
 - Matters
- PM Practice Manage...**

Main Workspace (Right):

My Activities

Due: All | Activity Type: All

Activity Type	Subject	Regarding	Priority	Start Date	Due Date
Email	Documents: Word from client Matter.docx	Primas Law	Normal		
Email	Documents: LEGAL MEMORANDUM 01001.docx_test19_dollar_sign.png_Word fro...	01001	Normal		
Task	Task Test		Normal		

Rows: 3

Accounts

An **account** is an organisation or institution.

Steps:

1. Click **Accounts** in the navigation
2. Click **New**, fill in the details and click **Save**
3. Select a record to **edit** or **delete** it

The Accounts page lists all active accounts.

Active Accounts ▾							 Edit columns	 Edit filters	 Filter by keyword
☐	Account Name ↑ ▾	Client Type / Account Type ▾	Main Phone ▾	Primary Contact ▾	Address 1 ▾	City ▾			
☐	Paul White Holdings Limited	Education Provider / Institution	07500885622		Graylands 503 Broadway...	Letchworth Garden City			
☐	Primas Law								
☐	test								
☐	Test Account	Company / Employer							
☐	The Excellency Centre Limited		07792 676786	Tay Meruk	8 Carlton Street Bolton B...	Bolton			
☐	Vendor demo account	Other Organisation							
☐	Warwick Holdings Group Limited	Company / Employer	0151 933 3030	Antony Clarke	36 Howe Street Boolte L...	Boolte			

Account Details

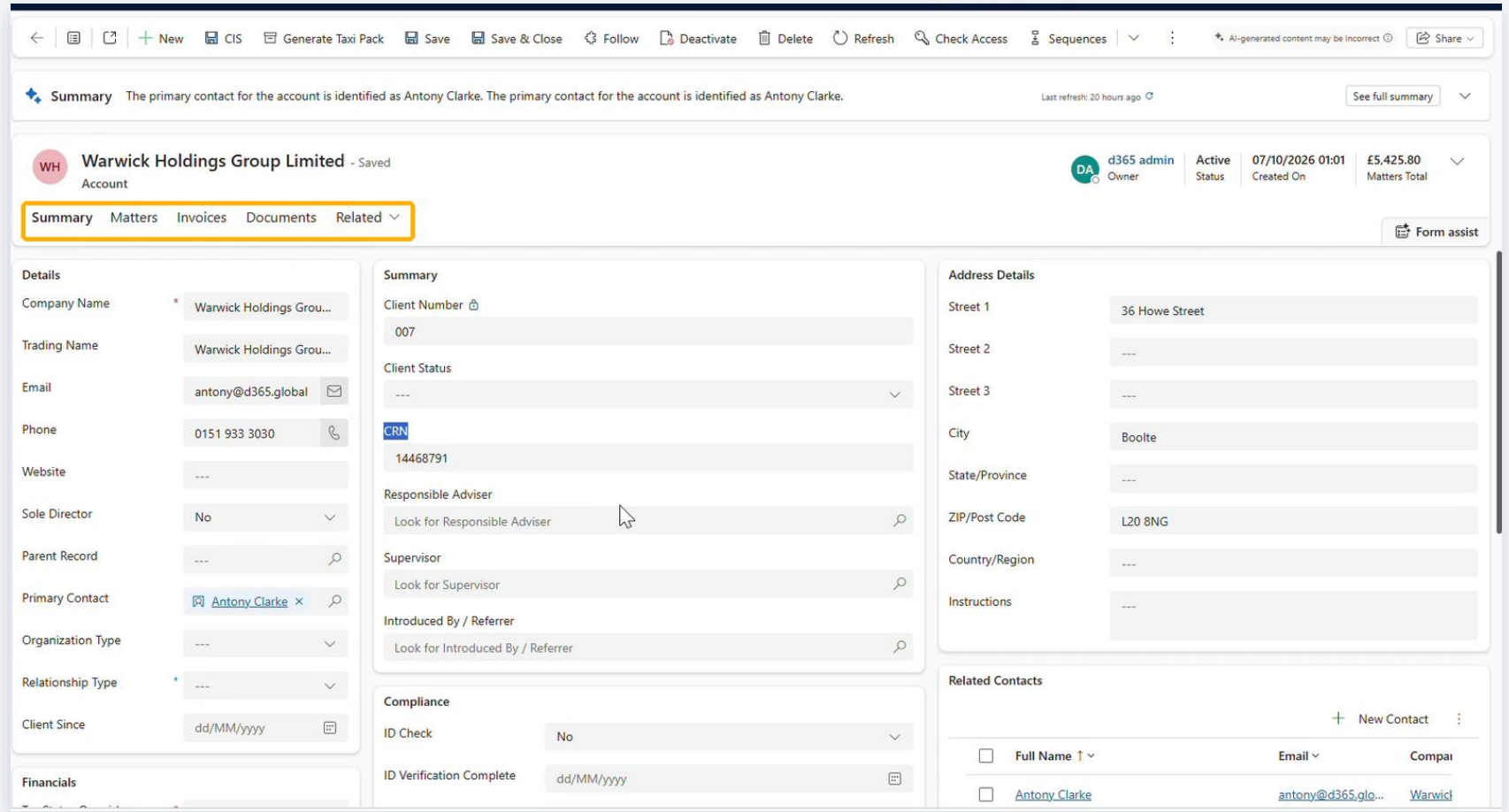
The **Summary** tab holds the basics.

Steps:

1. Open an account from the list
2. Check the **Summary** and **compliance** details
3. Add a **primary contact**, which also appears in **Related Contacts**

Note: Use the **Timeline** to send emails, log calls and create appointments.

Open an account to see its details, CRN number, responsible advisors and primary contact.



The screenshot shows the 'Summary' tab of an account for 'Warwick Holdings Group Limited'. The page is divided into several sections:

- Summary:** Displays the primary contact as Antony Clarke. It includes fields for Client Number (007), Client Status (---), CRN (14468791), Responsible Adviser (Look for Responsible Adviser), Supervisor (Look for Supervisor), and Introduced By / Referrer (Look for Introduced By / Referrer).
- Details:** A sidebar on the left containing fields for Company Name, Trading Name, Email (antony@d365.global), Phone (0151 933 3030), Website, Sole Director (No), Parent Record, Primary Contact (Antony Clarke), Organization Type, Relationship Type, and Client Since (dd/MM/yyyy).
- Address Details:** Fields for Street 1 (36 Howe Street), Street 2, Street 3, City (Boolte), State/Province, ZIP/Post Code (L20 8NG), and Country/Region.
- Compliance:** Fields for ID Check (No) and ID Verification Complete (dd/MM/yyyy).
- Related Contacts:** A table at the bottom showing related contacts, with 'Antony Clarke' listed as the primary contact.

The top navigation bar includes options like New, CIS, Generate Taxi Pack, Save, Save & Close, Follow, Deactivate, Delete, Refresh, Check Access, Sequences, and a share button. The account status is shown as 'Active' with a creation date of '07/10/2026 01:01' and a total value of '£5,425.80'.

Account Matters

See all work for an account in one place.

Steps:

1. Open the **Matters** tab
2. Click a matter name to open it
3. Open the **Invoices** tab to see invoices for those matters

The Matters tab lists every matter where this account is the client. The Invoices tab lists their invoices.

WH

Warwick Holdings Group Limited - Saved

Account

DA

d365 admin

Owner

Active

Status

07/10/2026 01:01

Created On

£5,425.80

Matters Total

Summary

Matters

Invoices

Documents

Related

Form assist

Client Matters 4

Matters for Warwick Holdings Group Limited.

Delete

+ New Matter

Matter	Jurisdiction	Application/Visa Category	Responsible Attorney	Billable Type	Matter Status	Created On
☐ 01010 - Commercial	—	—	d365 Test User	Fixed Fee	Open	10/19/2026
☐ 01005 - MC TEST – Matter Contacts	—	—	d365 admin	Fixed Fee	Open	10/13/2026
☐ 01001	—	—	d365 admin	Per Diem	Open	10/7/2026
☐ 01000 - Test	—	—	d365 admin	Per Diem	Open	10/7/2026

Related Matters 0

Matters linked through connections.

No matters found for any connected people.

Contacts

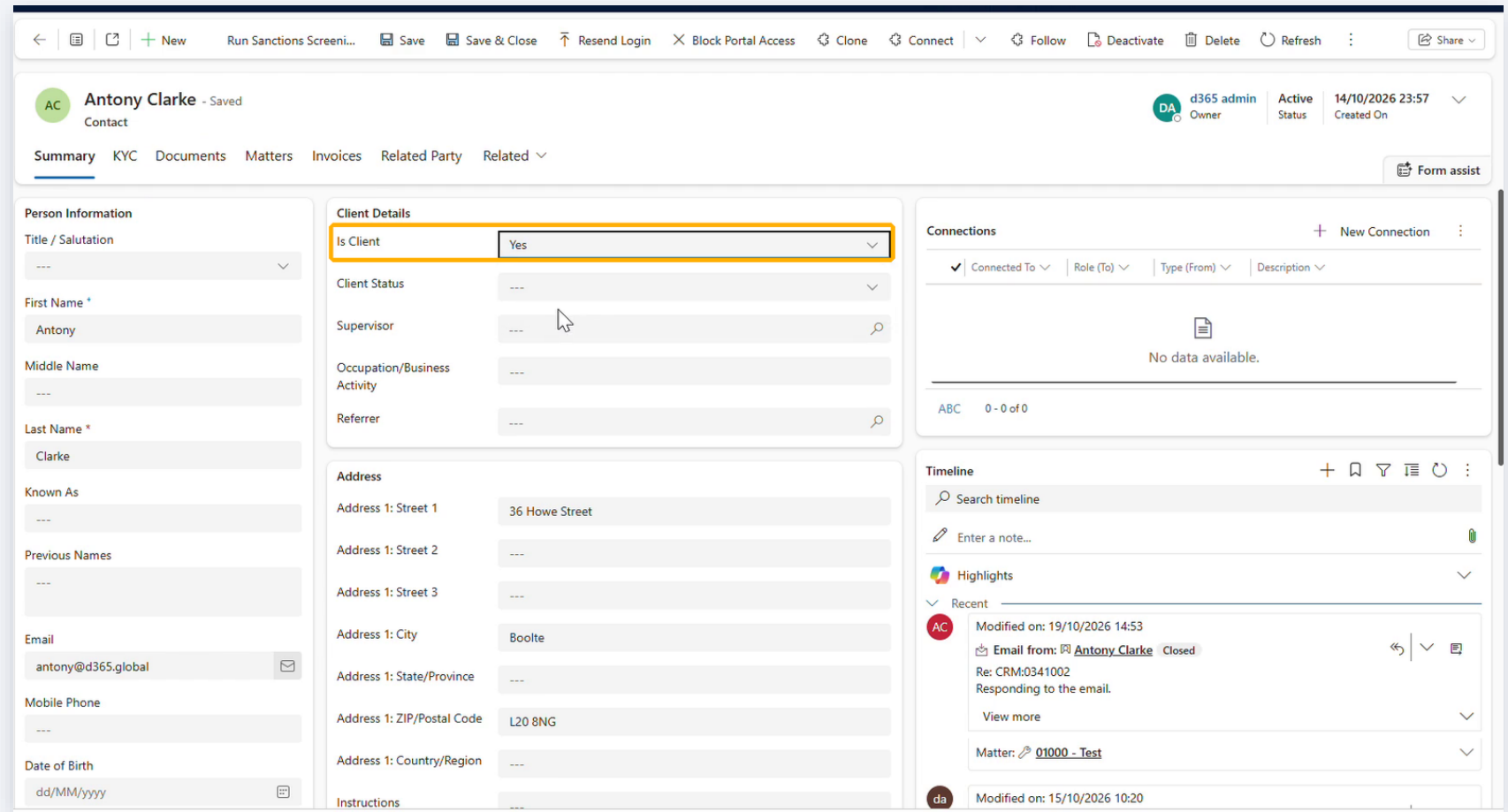
A **contact** is an individual person.

Steps:

1. Click **Contacts**, then **New**
2. Enter their details, and a **company name** if they belong to an account
3. Set **Is Client** to **Yes** if they have a matter, then **Save**

Note: A **client number** is created automatically when **Is Client** is **Yes**.

Contacts work like accounts. Create one with **New** and fill in the Summary tab.



The screenshot shows the 'New Contact' form in d365 Global. The contact is named 'Antony Clarke' and is saved. The 'Summary' tab is active. The 'Is Client' dropdown is highlighted with an orange box and set to 'Yes'. The form includes sections for Person Information, Client Details, Address, and Connections. The 'Client Details' section shows 'Is Client' as 'Yes', 'Client Status' as '---', 'Supervisor' as '---', 'Occupation/Business Activity' as '---', and 'Referrer' as '---'. The 'Address' section shows 'Address 1: Street 1' as '36 Howe Street', 'Address 1: Street 2' as '---', 'Address 1: Street 3' as '---', 'Address 1: City' as 'Boolte', 'Address 1: State/Province' as '---', 'Address 1: ZIP/Postal Code' as 'L20 8NG', and 'Address 1: Country/Region' as '---'. The 'Connections' section shows '0 - 0 of 0' connections. The 'Timeline' section shows a recent event: 'Email from: Antony Clarke - Closed' with details 'Re: CRM:0341002 Responding to the email.' and 'Matter: 01000 - Test'.

Matters

Matters are where most of the work happens.

Steps:

1. Click **Matters** in the navigation
2. Click **+ New Matter**, fill in the main details and **Save**
3. Click a matter name to open it

The Matters page lists all active matters.

← Show As Show Chart + New Matter Delete Refresh Excel Templates Export to Excel Import from Excel Open Dashboards Share										
Active Matters Edit columns Edit filters Filter by keyword										
☐	Matter Title	Matter Na...	Matter Subj...	Client	Responsible Attorney 1	Jurisdicti...	Application / Visa Cate...	Matter Sta...	Billable Ty...	Overall Matter Decision St...
☐	01010 - Commercial	01010	Commercial	Warwick Holdings Group ...	d365 Test User			Open	Fixed Fee	
☐	01009 - Trust disagreement	01009	Trust disagre...	Paul White	Kate Duty			Open		
☐	01008 - TA TEST B	01008	TA TEST B	MCT2 NoCompany	d365 admin			Open	Fixed Fee	
☐	01007 - TA TEST A	01007	TA TEST A	MCT2 NoCompany	d365 admin			Open	Fixed Fee	
☐	01006 - MC TEST 2 - Matt...	01006	MC TEST 2 - ...	MCT2 NoCompany	d365 admin			Open	Fixed Fee	
☐	01005 - MC TEST - Matter...	01005	MC TEST - M...	Warwick Holdings Group ...	d365 admin			Open	Fixed Fee	
☐	01001	01001	PA Test - Billi...	Warwick Holdings Group ...	d365 admin			Open	Per Diem	
☐	01000 - Test	01000	Test	Warwick Holdings Group ...	d365 admin			Open	Per Diem	

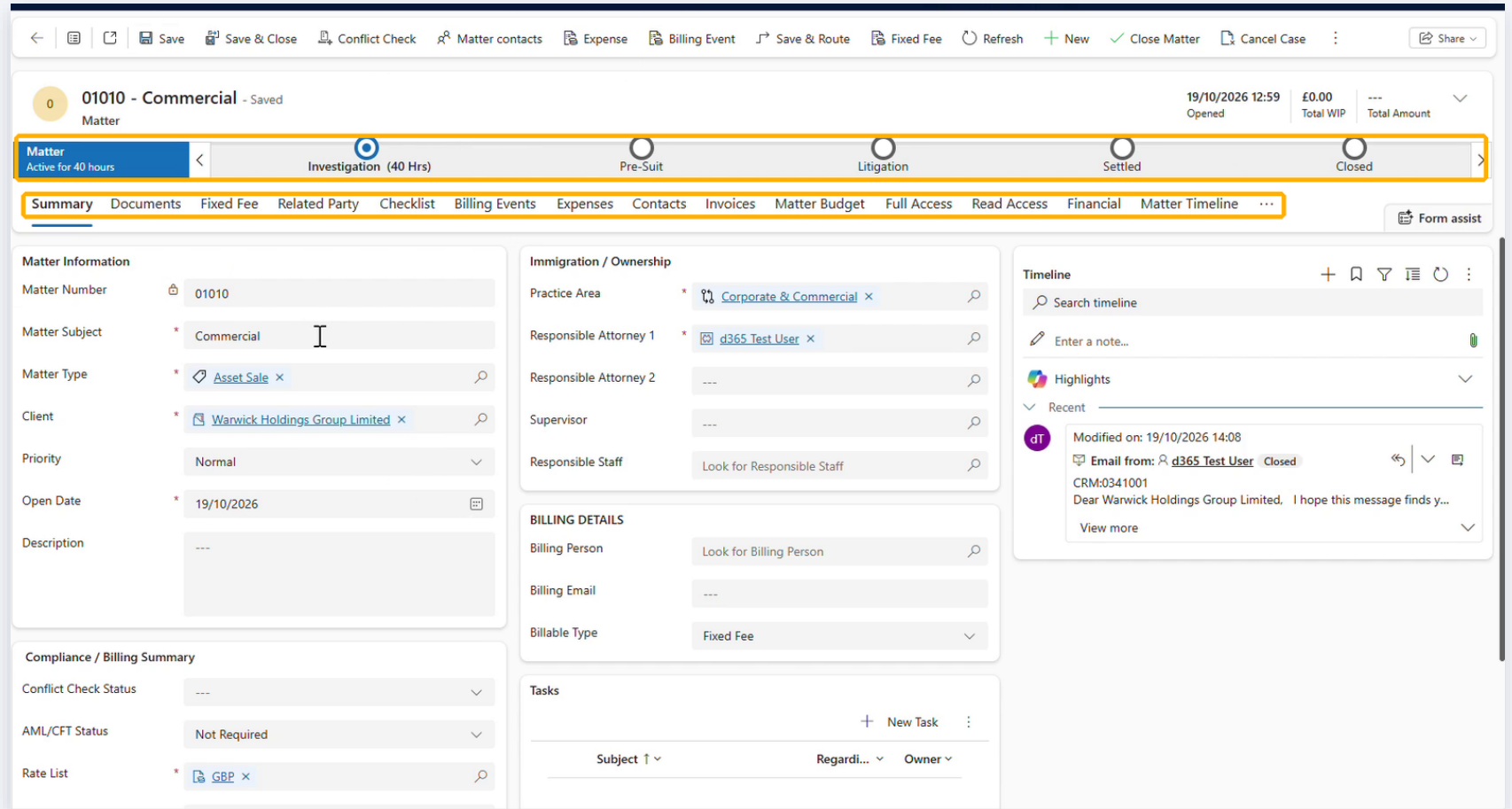
Matter Details

Complete the **Summary** and follow the **stages**.

Steps:

1. Fill in the **red star** fields: **subject, type, client** and **practice area**
2. Choose the **responsible attorney**
3. Use the tabs for **Tasks, Documents, Related Party** and **Checklist**

The stage bar guides you from Investigation through to Closed. Each tab holds a different part of the matter.



Tips for Getting Started

Three things worth remembering.

Use the Timeline

The **Timeline** on accounts, contacts and matters tracks emails, calls and appointments. Click **+** to add one.

Search everything

Global search finds contacts, accounts, matters and trust ledgers from any page.

Mandatory fields

Fields with a **red star** must be filled in before you can save.

Need help? Contact **d365.Global** if you cannot see an app or a record you expect.