FOR LAW FIRMS

Keep matter data in step across your systems, without anyone retyping it

Most firms run matters in more than one place: the practice management system, plus Notion, SharePoint, a CRM or a spreadsheet. Staff retype matter details and trust balances between them. Osher Digital connects those systems, with checks that never overwrite a lawyer's work and hold anything uncertain for a person.

1,100	4	0	341
open matters kept current on every run	mismatched matters caught before any data was written	hand-set categories or notes overwritten	automated tests behind the sync

What we automate

01
Matter sync
New matters, descriptions and trust balances flow from the practice management system to Notion, SharePoint or your CRM, so nobody types them twice.

02
Client intake
Web enquiries and intake forms become a checked new-matter record, with the details ready for a conflict check.

03
Document drafting
Letters, cost agreements and standard forms drafted from matter data and your templates. A lawyer reviews each one before it goes out.

04
Email and document filing
Incoming email and attachments filed against the right matter, and named the same way every time.

05
Private AI over your precedents
An assistant that answers from your own precedents and procedures, runs privately and links every answer to its source.

06
Audit trail and weekly report
Every change is logged, with a plain-English summary of what changed and which records need a person.

Works with your practice system and the tools around it

Whichever system your firm runs on, we keep it in step with the tools your lawyers use.

Affinity · SharePoint · Notion · LEAP · Smokeball · Actionstep · Clio · Microsoft 365

We pick the most reliable way in, and we change only what the automation owns:

1. **API.** Where the system has one, records move directly and securely.
2. **Scheduled export.** We read the export your IT provider already produces, as we do for a Melbourne firm on Affinity.
3. **Change only the differences.** Each run writes only the fields it owns, and holds anything doubtful for a person.
4. **Software robot.** For steps with no other way in, a bot with its own login works through the screens like a person. We quote its upkeep up front.

CASE STUDIES

Examples from our work

MATTERS SYNCED FROM AFFINITY TO NOTION

Sharrock Pitman Legal, a Melbourne law firm, runs matters in Notion and keeps its records in Affinity. Admin staff retyped matter details and trust balances between the two, and the lists drifted every week.

A small service now reads Affinity's scheduled export and writes only the differences to Notion. It never touches hand-set categories or working notes, and it refuses to run when the numbers look wrong.

- About 1,100 open matters kept current on every run
- Four mismatched matters caught before any data was written
- A weekly audit email that names every record needing a person

DOCUMENTS DRAFTED AND PRIVATE AI

For an NDIS provider, we built an AI agent that drafts insurance claim forms from incident reports, quotes and photos. Manual data entry fell by about 70%.

For a building inspection firm, we built a self-hosted AI assistant that answers staff questions from internal procedures, legislation and standards, with a link to the source for every answer.

- Drafts are reviewed by a person before they go out
- Private AI that runs on infrastructure the firm controls
- Answers that cite the document they came from

Confidential by design

- ✓ We host in Australia, and access is scoped to the one site or folder a workflow needs.
- ✓ Every writer is off by default. You see weeks of "here is what it would do" before it writes anything.
- ✓ A record the system cannot place is held for a person. It is never guessed into the wrong matter.
- ✓ AI drafts, a lawyer decides. Nothing we build gives legal advice.

How a project runs

1. **A 15-minute call.** Tell us which systems hold your matters and where staff retype data today.
2. **A clear quote.** We tell you which method fits and what it costs, including upkeep.
3. **Report first, then write.** The automation reports what it would change until you switch each writer on.
4. **Go-live and tuning.** We train your team, set up the review list and tune the checks on real use.

About Osher Digital

Osher Digital is a Brisbane AI and business process automation consultancy. We build automations, AI agents and custom software for Australian businesses, and we host them in Australia.

More on this page

The web version of this statement, with every case study and our answers to common questions, is at osher.com.au/industries/law-firm-automation/

Stop retyping matters

Book a free 15-minute call. Tell us which systems hold your matters, and we'll tell you what fits and what it costs.

Book a 15-minute call
osher.com.au/book-a-call
info@osher.com.au
+61 7 3357 1154

Osher Digital is a trading name of Unlimited 4 Pty Ltd, Level 38, 71 Eagle Street, Brisbane QLD 4000. Results are from case studies published at osher.com.au. Affinity, SharePoint, Notion, LEAP, Smokeball, Actionstep, Clio, and Microsoft 365 and other product names are trademarks of their owners. Osher Digital is not affiliated with these companies.