

Sterlington

Client Name: Lawal Fashola

Country: United States

Total Users: 173

Subscription: Zoho One



ABOUT THE CLIENT

Sterlington PLLC is a New York-based international law firm specializing in complex corporate, executive compensation, litigation, and transactional matters. The firm provides high-level legal expertise and tailored solutions, helping clients worldwide achieve their business objectives. With a focus on innovation, financial flexibility, and personalized client service, Sterlington's experienced partners handle sophisticated business matters with a strategic and client-centered approach.



PROJECT OVERVIEW

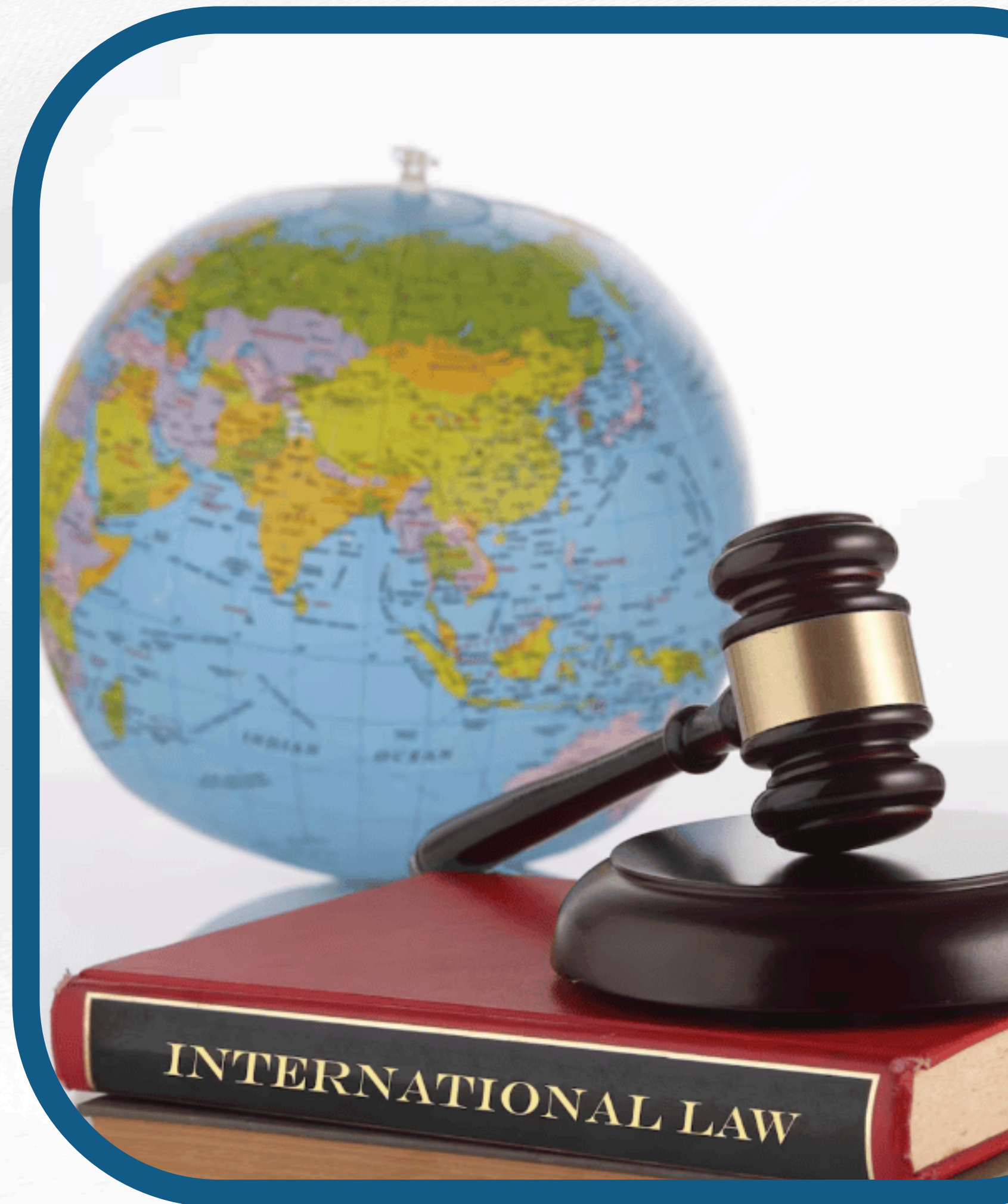
Sterlington Law wanted to implement a centralized legal management system to manage clients, matters, time tracking, billing, and internal team collaboration across all departments. The main goal was to automate their end-to-end operations from client onboarding and case handling to tracking billable hours and generating invoices using Zoho's suite of applications, ensuring better control over workflows and data.

PROJECT OBJECTIVES

Prior to the project, Sterlington Law relied heavily on manual processes, which made it difficult to keep track of cases, monitor team progress, and maintain accurate client records. Sterlington collaborated with UniCloud IT Services to implement Zoho's platform and bring all operations into a single system. This partnership improved coordination between teams, enhanced visibility into ongoing matters, and allowed Sterlington Law to manage complex legal work more efficiently while keeping client information organized and up-to-date.

CHALLENGES

During the implementation, UniCloud IT Services faced several challenges while setting up a centralized system for Sterlington Law. Integrating multiple Zoho applications with existing processes required careful planning to ensure data consistency and avoid disruption of ongoing operations. Customizing the Zoho Creator application to meet the firm's specific workflow needs while maintaining flexibility for future updates was complex. Additionally, coordinating with multiple departments to standardize processes and ensure smooth adoption of the new system required effective communication and change management strategies.



SOLUTIONS

UniCloud IT Services worked closely with Sterlington Law to design and implement a custom Zoho Creator application as the firm's central operational hub. The solution was tailored to integrate with multiple Zoho applications, enabling automated workflows, real-time data synchronization, and better visibility across clients, matters, billing, and team activities. By centralizing operations in this way, the firm was able to reduce manual effort, track progress efficiently, and manage complex legal processes with greater accuracy and control.

FEATURES AND FUNCTIONALITIES

1. Team Members Module

- Stores details of all team members, their roles, and hourly or project-based billing rates.
- Rates are auto-applied to project time entries.
- Linked with Zoho People for syncing user details and attendance.

The screenshot shows the 'Add a Team Member' form in the Sterling Automation application. The form is divided into two columns for data entry. The left column includes fields for Team Member ID (with a note 'auto generated by the system'), First Name, Middle Name1, Middle Name2, Last Name, Suffix, Nickname, W9 Name, Current Member (Yes/No), joining Date, Last Working Date, Role Title, Invoice Title, Practising Lawyer (Yes/No), Recruiter Involved (Yes/No), and Department. The right column includes fields for First Name, Last Name, Middle Name1, Middle Name2, Current Member (Yes/No), joining Date, Last Working Date, Role Title, Invoice Title, Practising Lawyer (Yes/No), Recruiter Involved (Yes/No), and Data Entry Status (Pending).

The screenshot shows the 'All Team Members' table in the Sterling Automation application. The table lists team members with columns for Team Mem..., Company, TM Header Form, Current Me..., First Name, Last Na..., Middle Name1, and Middle Name2. The table is filtered to show 10 team members.

Team Mem...	Company	TM Header Form	Current Me...	First Name	Last Na...	Middle Name1	Middle Name2
10480	PLLC	TM Header Form	Yes	Christin	Staszewski		
10479	SPSC	TM Header Form	Yes	Henrique	Ouro Weber		
10478	PLLC	TM Header Form	Yes	Kevin	Collins		
10477	SPSC	TM Header Form	Yes	Rowan	Lloyd		
10476	SPSC	TM Header Form	Yes	Dawn	Emmery		
10475	SPSC	TM Header Form	Yes	Diana	Jones		
10474	SPSC	TM Header Form	Yes	Rakesh	Valand		
10473	SPSC	TM Header Form	Yes	Anjali	Unnath		

2. Clients Module

- Manages client profiles and contact details.
- Syncs automatically with Zoho CRM to ensure alignment between client records and ongoing matters.

The screenshot displays the 'Add Client' form within the Sterling Automation application. The interface includes a top navigation bar with the application name, user profile, and help options. A left sidebar lists various modules, with 'Clients' currently selected. The main form area is divided into two sections: 'Add Client' and 'Invoicing Details'. The 'Add Client' section contains fields for 'Client ID' (with a red asterisk), 'Client Group', 'Sterling Entity', and 'Company Name' (also with a red asterisk). The 'Invoicing Details' section includes 'Applicable Rate Card' (with a red asterisk), 'Contact Person', and 'Client Address' (which is further divided into 'Address Line 1' and 'Address Line 2').

Sterling Automation

Subscription Edit this application Help

SA Sterling Autom...

TM IT Data

TM Billing Rates

TFC Rates and Costs

Tfc Rates

Direct Costs

Clients

Add Client

All Clients

Matters

SF US State Bar Admission

SF Non US Bar Admission

Sf Referral Details

Add Daily Time Entry

Add Client

Client ID * 11241

Client Group -Select-

Sterling Entity -Select-

Company Name *

Invoicing Details

Applicable Rate Card * -Select-

Contact Person

Client Address

Address Line 1

Address Line 2

3. Matters Module

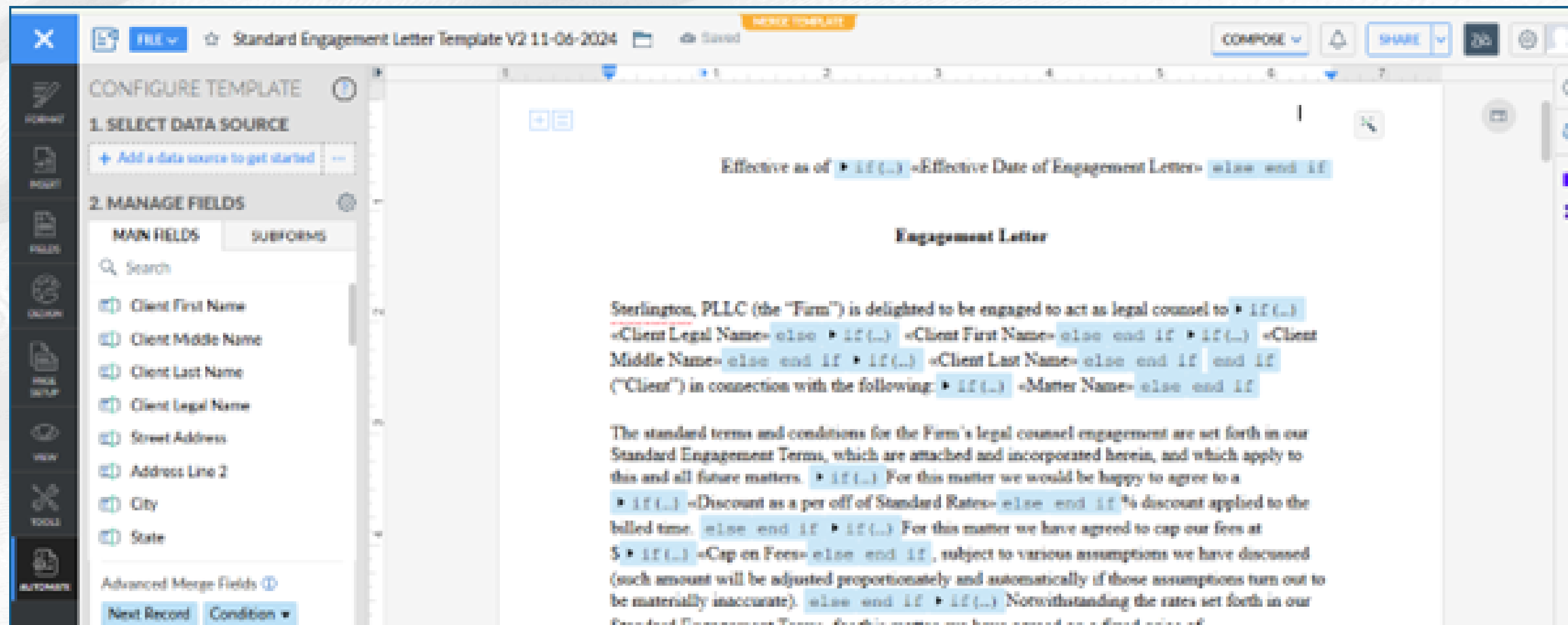
- Centralized record for each legal matter.
- Each matter stores the associated client, assigned team members, billing type (hourly or project-based), and engagement details.
- On creation, the matter automatically triggers project creation in Zoho Projects through a workflow.

The screenshot displays the 'Add Matter' form within the Sterling Automation application. The interface includes a top navigation bar with 'Subscription', 'Edit this application', and 'Help' links. A left sidebar contains a menu with options like 'Clients', 'Matters', 'Add Matter', 'All Matters', and various reports. The main form area is titled 'Add Matter' and contains several input fields and dropdown menus. The fields are organized into two columns. The left column includes 'Client' (a dropdown menu), 'Matter ID' (a text field with a 'System generated' note), 'Project Name' (a text field), 'Matter Owner' (a dropdown menu), 'Industry Group' (a dropdown menu), 'Matter (Project) Type' (a dropdown menu), 'Open / Closed Status' (a dropdown menu with 'Open' selected), and 'Data Entry Status' (a dropdown menu with 'Pending' selected). The right column includes 'Entity' (a dropdown menu), 'Client-Matter ID' (a text field), 'Accounting Class' (a dropdown menu), and 'Department' (a dropdown menu). At the bottom of the form, there is a 'Phone' field and a 'Email' field.

Field	Value
Client	-Select-
Entity	-Select-
Matter ID	System generated
Client-Matter ID	
Project Name	
Matter Owner	-Select-
Industry Group	-Select-
Matter (Project) Type	-Select-
Accounting Class	
Department	
Open / Closed Status	Open
Data Entry Status	Pending
Phone	
Email	

4. Engagement Letter Module

- Automatically generates engagement letters using Zoho Writer templates.
- Merges client and matter data dynamically.
- Stores the final signed document in Zoho WorkDrive.



5. Invoices Module

- Creates invoices based on time entries and matter billing type.
- Fetches time entries from Zoho Creator and calculates total billable amount.
- Invoices are sent through Zoho Books/Zoho Invoice integration (optional).

The screenshot displays the Sterlington Automation web application interface. The top navigation bar includes the application name, user profile (Parmmeet Singh), and links for Subscription, Edit this application, and Help. A left sidebar lists various modules, with 'Invoice Automation' currently selected. The main content area features the Sterlington logo and a dashboard with eight summary cards: Today's Invoices (0), Current Month's Invoices (130), All Sent Invoices (164), Already Invoiced (1,984), Drafted (1,760), Pending For Approval (2), Approved (55), and Rejected (3). Action buttons for 'Gen Spreadsheet' and 'Generate Invoice' are present. Below the dashboard is an 'Invoices' table with columns for Preview, Void, Invoice Number, Client Name, Project Name, Period Cove..., and Status. Two draft invoices are listed.

Preview	Void	Invoice Number	Client Name	Project Name	Period Cove...	Status
Preview	Void	11235-1-01974-DCo	Leporace, Joseph	Trust FBO Anna Marie Frusco	September 2025	Draft
Preview	Void	11234-1-01973-DCo	French - Harry French Trust	Trust Administration	September 2025	Draft

6. Time Entries Module

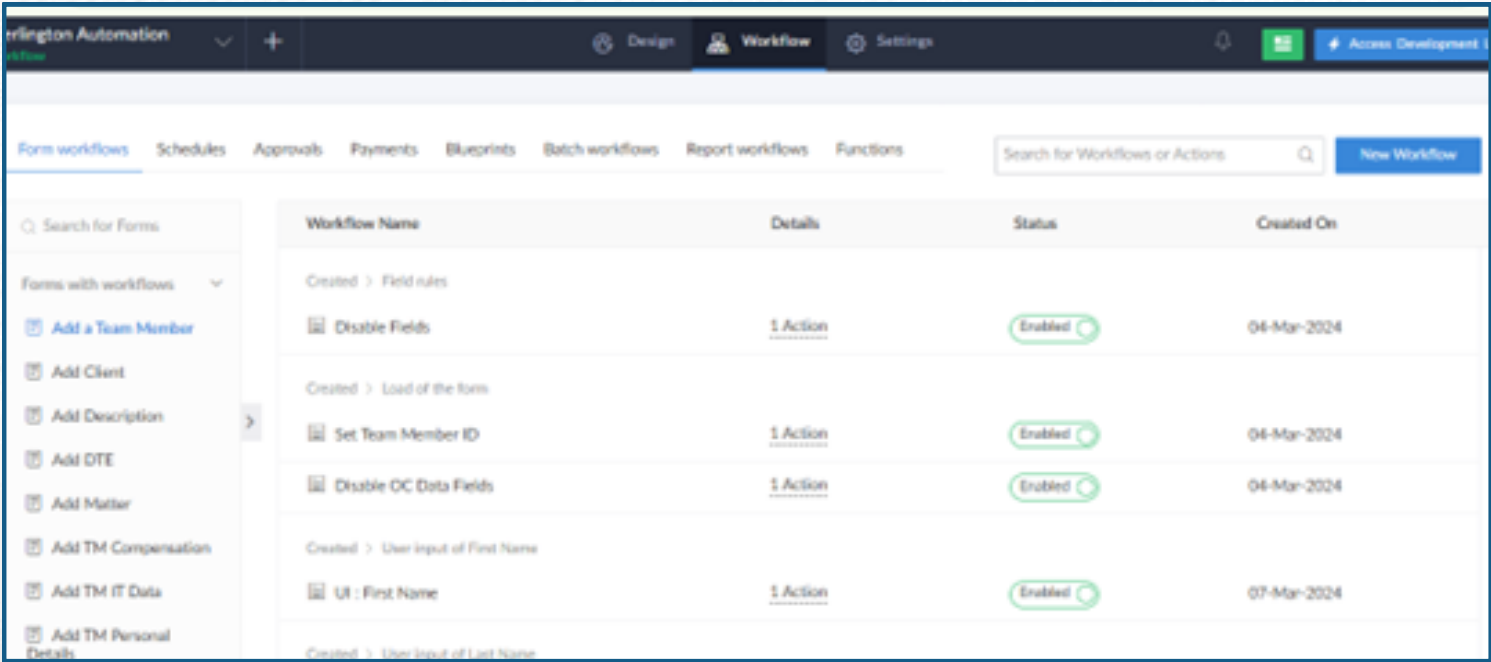
- Tracks daily work logs from all team members.
- Automatically syncs with Zoho Projects Timelogs.
- If any time entry fails or contains invalid data, a ticket is auto-created in Zoho Desk for review.

The screenshot shows the 'Add DTE' (Add Daily Time Entry) form within the Sterling Automation application. The interface includes a top navigation bar with 'Sterling Automation', 'Subscription', 'Edit this application', and 'Help' links. A left sidebar contains a menu with options like 'Dashboard', 'Time Checks', 'All DTEs', 'Add DTE', 'JLG DTEs', 'DTE Change Log', 'All Dte Change Logs', 'Backend of All DTEs', 'Monthly Time Check', 'Monthly Time Entries', and 'All Monthly Time Checks'. The main form area is titled 'Add DTE' and contains several input fields: 'Record Id' (text), 'Source' (dropdown menu showing 'TW'), 'Date' (calendar icon), 'DateTime' (calendar icon), 'Hours' (text), 'TW Created' (calendar icon), 'TW Last Updated' (calendar icon), and 'Team Member' (dropdown menu). The user 'Parmmeet Singh' is logged in, as indicated in the top right corner.

Automations Implemented

1. Workflows

Workflow Name	Trigger	Functionality
Create Project in Zoho Projects	On Matter Creation	Creates a new project in Zoho Projects with the same name and links it to the client.
Sync Time Entries		Syncs entries to Zoho Projects Timelogs automatically. Through scheduler
Generate Engagement Letter	On Client Approval	Merges data with Zoho Writer template and uploads to WorkDrive.
Invoice Auto-Generation	On Project Completion	Generates an invoice automatically and sends for review.
Error Ticket Creation	On Error Event	Creates a error tickets in Zoho Desk for any sync or data mismatch issues



2. Schedulers

Scheduler Name	Frequency	Purpose
Time Entry Sync Scheduler	Hourly	Syncs time entries from Zoho Projects to Zoho Creator.
Error Check Scheduler	Daily	Scans for missing or invalid entries and creates Zoho Desk tickets automatically.
Analytics Sync Scheduler	Daily	Pushes summarized data to Zoho Analytics for reporting.

Sterlington Automation
Workflow

+

Design

Workflow

Settings

Access Development User

Form workflows

Schedules

Approvals

Payments

Blueprints

Batch workflows

Report workflows

Functions

Search for Workflows, Forms or Actions

New Workflow

Workflow Name	Details	When	Status	Created On
Inactive Matters Report	1 Action	14-Oct-2020 : 00:30:00	Enabled	04-Mar-2024
ZP FA Sync Main 00:05	10 Actions	27-Jan-2021 : 00:05:00	Enabled	04-Mar-2024
ZP FA Sync Main 01:05	10 Actions	27-Jan-2021 : 01:05:00	Enabled	04-Mar-2024
ZP FA Sync Main 02:05	10 Actions	27-Jan-2021 : 02:05:00	Enabled	04-Mar-2024
ZP FA Sync Main 03:05	10 Actions	27-Jan-2021 : 03:05:00	Enabled	04-Mar-2024
ZP FA Sync Main 04:05	10 Actions	27-Jan-2021 : 04:05:00	Enabled	04-Mar-2024

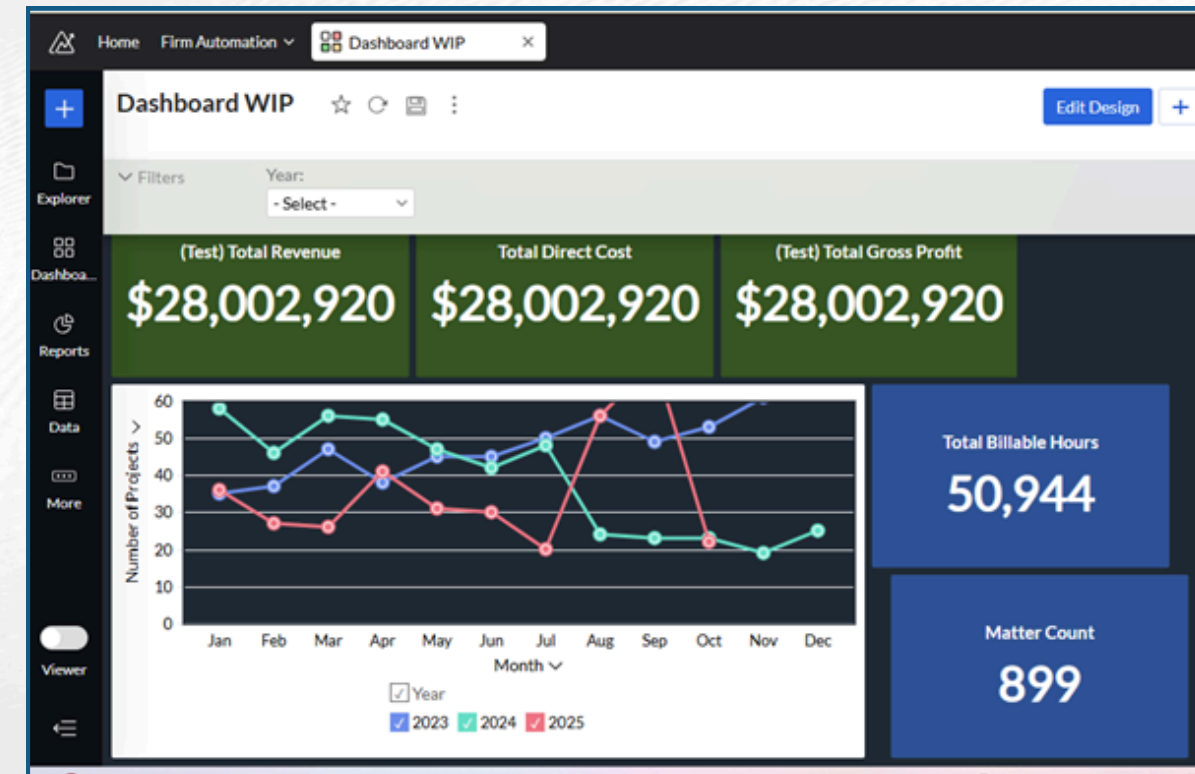
Integrations

Application	Integration Type	Description
Zoho Projects	API Hourly	Projects and time log synchronization.
Zoho Desk	API	Error and issue tracking via automated ticket creation.
Zoho Writer	Merge Templates	Document generation for engagement letters.
Zoho WorkDrive	API	Central document storage.
Zoho Analytics	Data Pipeline	Reporting and dashboard visualization.
Zoho People	API	Team member data sync and attendance mapping.

Reporting & Analytics

All operational and financial data flows into Zoho Analytics, where dashboards are built for:

- Team utilization and performance tracking
- Matter-wise profitability
- Client billing summaries
- Project progress and timelines
- Invoice and payment status



The dashboard displays a table titled "Revenue Accruals for Fee for Service Matters" with columns: Company Name, Project Name, Accounting Class, Open / Closed Status, Fees at 100% Standard Billing Rate, Fees at Discounted Standard Billing Rate, and Revenue Accrual. The table shows a Grand Total and several rows of data for different companies and projects.

Company Name	Project Name	Accounting Class	Open / Closed Status	Fees at 100% Standard Billing Rate	Fees at Discounted Standard Billing Rate	Revenue Accrual
Grand Total:				\$39,358,899	\$22,886,282	\$21,917,145
AFI Partners LLC	Credit facility for Garbille	Corporate-Fee For Services	Closed	\$9,646	\$6,753	\$6,753
Adam Rikander	Estate Planning	Corporate-Fee For Services	Open	\$64,530	\$64,530	\$64,530
	Investment Manager Transaction	Corporate-Fee For Services	Closed	\$125,208	\$125,208	\$125,208
Akbar Thobhani	Corporate governance discussions	Corporate-Fee For Services	Closed	\$16,761	\$16,761	\$16,761
Alyone Events LLC	Contracts	Corporate-Fee For Services	Closed	\$2,097	\$2,097	\$2,097

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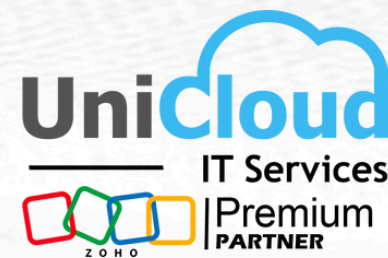
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ABOUT US

Founded on September 12, 2018, Unicloud IT Services is a trusted cloud service provider specializing in ZOHU solutions. Our team of experienced developers brings over seven years of combined expertise, delivering tailored services that help businesses across industries achieve their goals.

To date, we have successfully completed 1,000+ projects for over 5,000 clients, maintaining a 95% project success rate and strong client retention. Our team holds multiple ZOHU certifications, reflecting our commitment to quality, security, and reliable support.

Unicloud continues to expand its services, partnering with organizations of all sizes to implement effective, technology-driven solutions.



<https://www.uniclouditservices.com>