

## Success Stories

# Website app to provide services by modules to corporate clients of Morgan & Morgan

Rootstack moved, re-designed, and added new functionality to Morgan & Morgan's website app where they run some business services.

### About Morgan & Morgan

Morgan & Morgan is a recognized law firm with headquarters in Orlando, Florida, and with offices in different states within the US. In Panama, they also have offices to provide services to different companies from different industries such as real estate, banking and finance, government contracts, insurance, and maritime litigation among others.



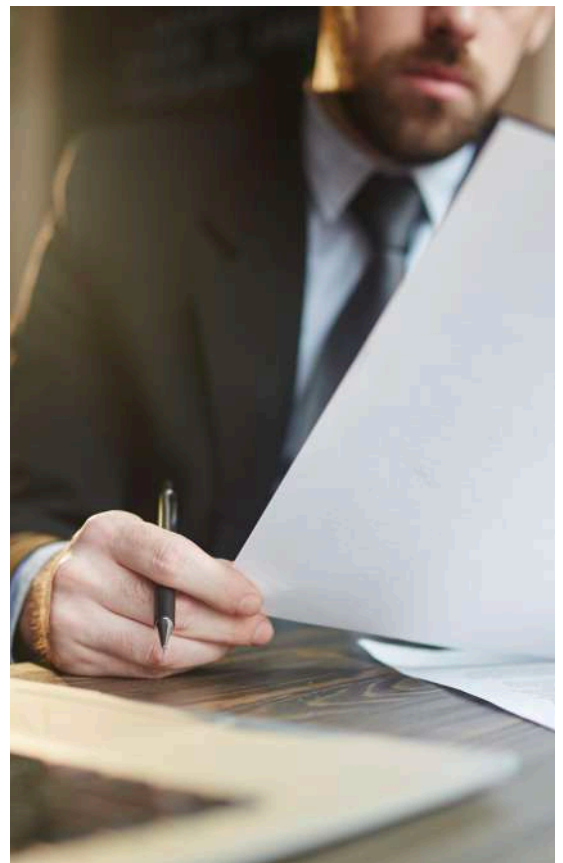
### Challenge

With the constant growth of Morgan & Morgan in Panama and new laws that came into force, it was necessary to make a change in the platform and execution of processes of some services. For this reason, Morgan & Morgan turns to Rootstack, to present their new ideas and needs, so Rootstack can apply them to a new system that responds to the client's requirements.

### Solution

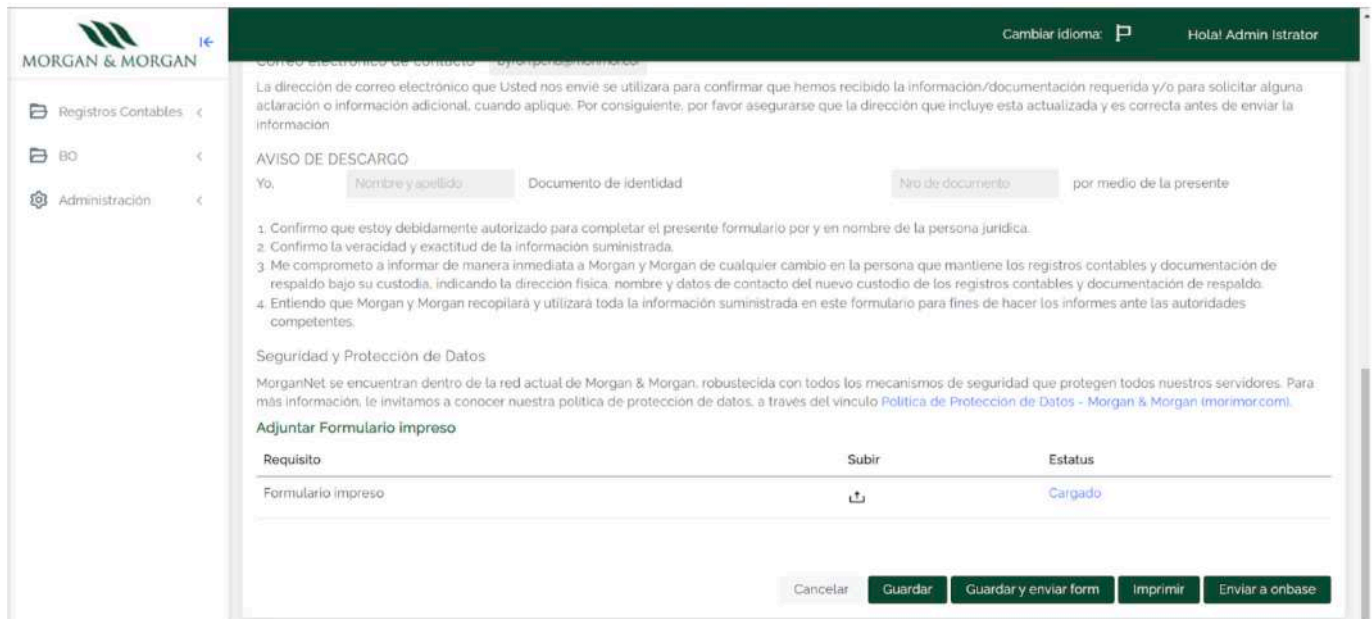
Considering the various factors of the market and the needs of the client, it was agreed to host the website app in the Microsoft Azure cloud, to guarantee security and constant operation.

This website app had to separate by module some client



solutions in relation to Law 254, real rights, and final beneficiaries, among other modules that will be developed soon.

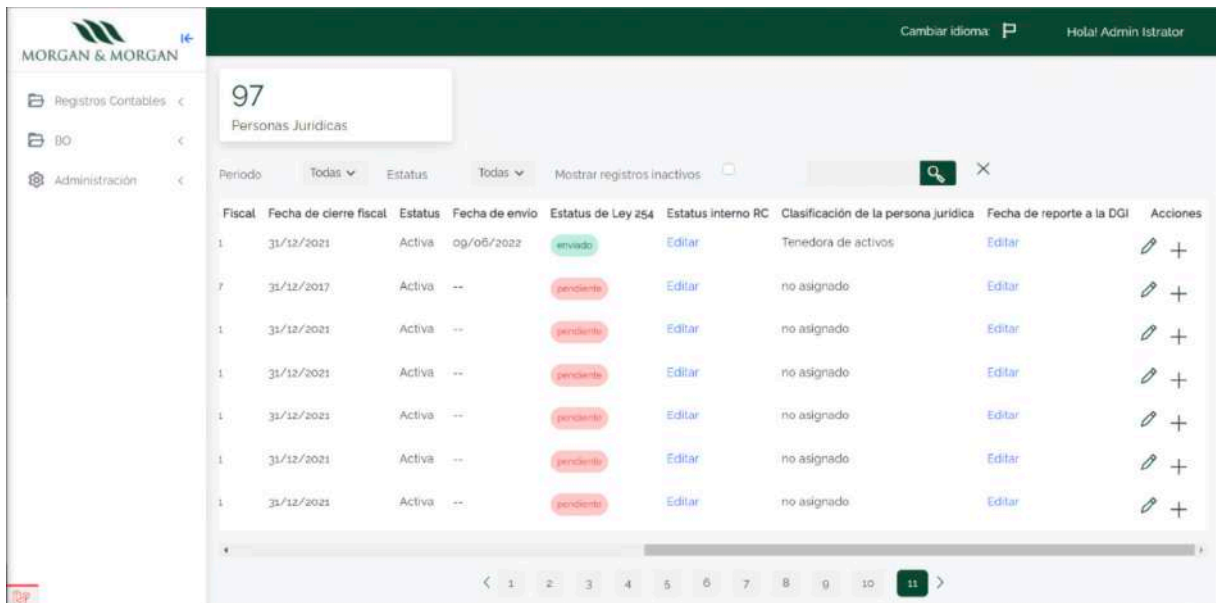
It had to be intuitive and friendly both with the internal user of Morgan & Morgan and with the users of corporate clients, both parties can access the platform, and have different permissions, restrictions, and functionalities depending on their profile and credentials.



The screenshot displays the Morgan & Morgan web application interface. The header includes the Morgan & Morgan logo, a language selector (Cambiar idioma: P), and a user greeting (Hola! Admin Istrator). The main content area is titled 'Correo electrónico de contacto' and contains a form for document upload. The form includes a text input for 'Nombre y apellido', a 'Documento de identidad' field, and a 'No de documento' field. Below the form, there are four numbered terms of service and a 'Seguridad y Protección de Datos' section. At the bottom, there is a table for 'Adjuntar Formulario impreso' with columns for 'Requisito', 'Subir', and 'Estatus'. The table shows one row for 'Formulario impreso' with a 'Subir' button and a 'Cargado' status. At the very bottom, there are buttons for 'Cancelar', 'Guardar', 'Guardar y enviar form', 'Imprimir', and 'Enviar a onbase'.

Morgan clients can interact with the platform depending on the service and need they seek to solve with the firm, regarding Law 254, to comply with the regulations of the new standard, the platform requests documentation and information that is filled out directly by the client. , where it selects and fills in fields that are displayed as it progresses through the possible flows depending on factors such as type of company, size, type of company, and other factors. This platform can appreciate and interact with different notifications, alerts, status, documents, the process in general, and clients.

Once the fields are filled in, the Morgan & Morgan staff proceeds to analyze the registered information, verify if there are any missing information or errors, and then proceed with the statements until they are finalized and stored. Backup copies are constantly saved in the cloud, however, the data is also held within the same website app.

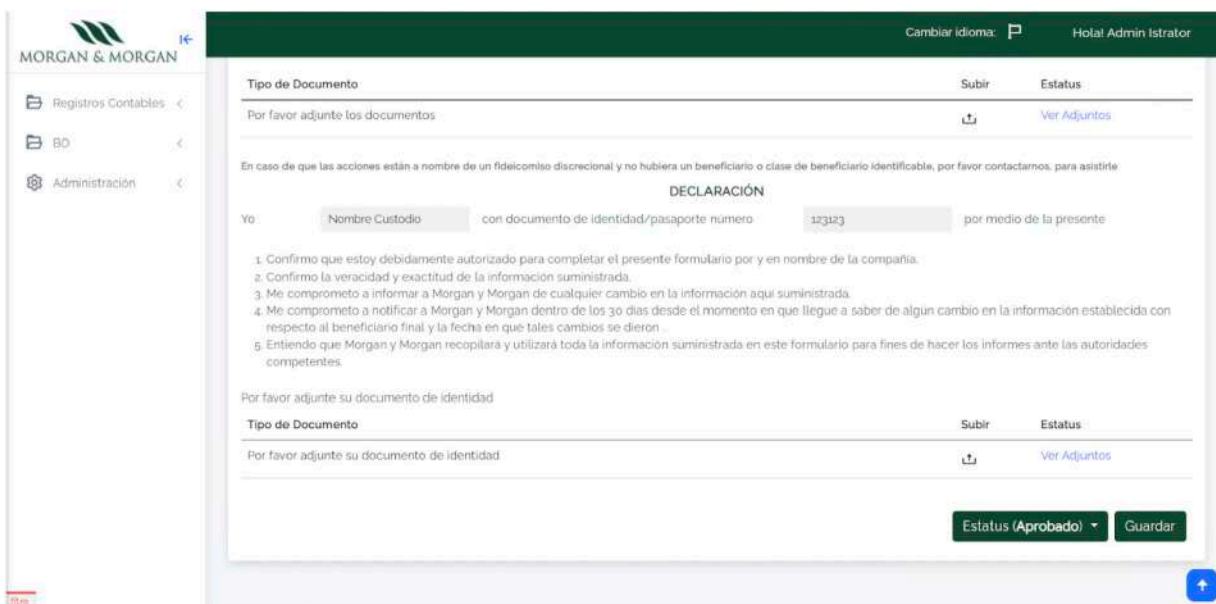


The screenshot shows the 'Personas Jurídicas' section of the Morgan & Morgan ERP. It features a search bar with the number '97' and a table with the following columns: Fiscal, Fecha de cierre fiscal, Estatus, Fecha de envío, Estatus de Ley 254, Estatus interno RC, Clasificación de la persona jurídica, Fecha de reporte a la DGI, and Acciones. The table contains several rows of data, with some entries marked as 'pendiente' (pending) and others as 'enviado' (sent).

Fiscal	Fecha de cierre fiscal	Estatus	Fecha de envío	Estatus de Ley 254	Estatus interno RC	Clasificación de la persona jurídica	Fecha de reporte a la DGI	Acciones
1	31/12/2021	Activa	09/06/2022	enviado	Editar	Tenedora de activos	Editar	[Pencil] +
7	31/12/2017	Activa	--	pendiente	Editar	no asignado	Editar	[Pencil] +
1	31/12/2021	Activa	--	pendiente	Editar	no asignado	Editar	[Pencil] +
1	31/12/2021	Activa	--	pendiente	Editar	no asignado	Editar	[Pencil] +
1	31/12/2021	Activa	--	pendiente	Editar	no asignado	Editar	[Pencil] +
1	31/12/2021	Activa	--	pendiente	Editar	no asignado	Editar	[Pencil] +
1	31/12/2021	Activa	--	pendiente	Editar	no asignado	Editar	[Pencil] +

The Morgan and Morgan ERP is connected to the website app to update the information of clients, files, users and maintain traceability of the company's internal staff involved in the processes within the app. Thus, providing confidence and security for customers and for the company. The security of the website app was endorsed and certified by a third-party cybersecurity company in the United Kingdom, which confirmed that it did not find possible major vulnerabilities in it.

Another functionality that was implemented was the automation and easy management of filling out and reviewing documents by clients and Morgan & Morgan, templates were created in the system for different types of contracts, where the information collected by the client is imported and this way is reflected in interactive fields and can be quickly reviewed by both parties, also avoiding possible human errors. In the dashboard, you can also see the status of the documents for each client, and it is integrated with notifications and alerts for transparency and visibility of the parties.



The screenshot shows a document submission form in the Morgan & Morgan ERP. The form includes a 'Tipo de Documento' field, a 'Subir' button, and an 'Estatus' field. Below this, there is a section for 'DECLARACIÓN' with a text area for the user to provide information. The form also includes a 'Guardar' button and a dropdown menu for 'Estatus (Aprobado)'. The user is currently logged in as 'Hola! Admin Istrator'.

Something that stands out throughout the project is the different formats for each module and area of different types of contracts and services, uniformity was achieved throughout the process despite the different variants of the information entered in the interactive fields of templates. As well as in the organization of internal files for each client. On the other hand, four different jurisdictions were enabled for the Final Beneficiaries module in companies, this is why the information is responsive to what the client selects as he fills out the form.

For the information that must be analyzed and made public to the regulatory entities, APIs were integrated under a methodical REST standard so that it reaches the regulatory entities in a safe and timely manner.

## Technologies

The previous platform was created and supported with PHP and Java. The technologies, tools, and languages used throughout this project were Microsoft Azure, Laravel, PHP, Bootstrap, CSS, HTML, Java Script, MYSQL, and Azure complementary services.

Three Rootstack Fullstack developers were involved in this project, with their capabilities they were able to solve the client's requirements and propose different solutions and perspectives to the proposed scenarios.

This is one of our projects for the legal industry. At Rootsack we have more than 10 years of experience designing and implementing solutions for companies from different industries, impacting different areas and operations. Here the key to success was the knowledge of our collaborators, who have been able to work with some of our more than 200 clients in more than 300 projects using various languages and technologies. Are you interested in a solution for your company? contact us

