Build the case.
Check the complete delivery.

Final Exhibit | iPhone, iPad, and Mac Catalyst

Case Files, Reports, and Billing | Review draft | October 30, 2026

Bring an assignment's linked evidence, narrative, supporting documents, and billing records together. Reuse appropriate agency and client information, then preview the actual report or invoice and verify every file before delivery.

One client can have several separate Case Files

Create a separate Case File for each matter or assignment. Reuse the client context and agreed rates where supported, while checking the case number, parties, item details, charges, attachments, and recipient for that matter. A Client Profile is not itself the case record.

SETTING / CONTROL	WHAT TO DO AND WHY
Case organization	Create/rename cases, link existing Evidence Locker items, assign a Client Profile, and write the Case Summary. The user-facing Apple label is Case Files; some internal source names still say CaseSession.
Report outputs	The supplied full case PDF/Word previews and PDF/Word/ZIP exports explicitly require Pro. Case organization is available without those export permissions.
Supporting Documents	The case file-picker workflow explicitly requires Pro. It stores copies of supported paperwork as attachments, without overlaying or editing those files.
Billing / invoices	Billing and invoice tools are described as Pro. Invoice actions explicitly check Pro; Add Billing Entry itself has no local Pro guard in the supplied case view/editor. Verify the production Free experience rather than promising every billing screen is locked.
Practical output limits	20,000 Case Summary characters is confirmed. No fixed case-count, linked-item-count, or full-report-page cap was identified in these views. File size, device resources, missing files, and layout still limit successful output.

Inside this chapter

2 Create a Case File | 3 Client and case context | 4 Link evidence | 5 Case Summary | 6 Supporting documents | 7 Choose output | 8 PDF checks | 9 Word and ZIP | 10 Billing entry | 11 Calculations | 12 Invoice options | 13 Branding and delivery | 14 Mac, sync, and search | 15 Field examples | 16 Review checks and help

Source-checked against the supplied Apple ZIP, with Android typography/presentation as reference. Missing Xcode project/model files and unresolved release/device behavior prevent final verification. This chapter identifies those gaps and does not change the app.

02 Create and maintain a Case File

1. On iPhone/iPad, open Case Files from Evidence Locker. On Mac, select Case Files in the Command Center sidebar.
2. Choose Create New Case File where offered, enter Case File Name, and Save. Use a recognizable matter number, address, or short assignment reference.
3. Open the case and use Assign Client Profile for the intended client.
4. Add existing media, write Case Summary, and add supporting documents and billing as applicable.
5. Reopen the same case as work develops, rather than creating another folder for each work period.

SETTING / CONTROL	WHAT TO DO AND WHY
Case File Name	Names the working case and appears in generated case output. It is separate from the Client Profile's Case Number used by the report/invoice builders.
Rename Case File	In case details, use Rename Case File and Save. List views also provide rename controls. Renaming does not automatically rewrite the profile's Case Number or tags on each item.
Assign / Change Client Profile	Sets the case's client relationship. Review the displayed client before generating reports, rates, invoices, or email handoffs.
Remove an item	Use the item's removal/trash control and review the case-detail confirmation. This unlinks the item from this case; it does not delete the Evidence Locker media.
Delete Case File	Preserve needed output first. The case-detail delete path unlinks evidence, deletes billing entries, and deletes imported supporting-document records and app-stored copies. Original source files remain separate.
Delete from a list	Some supplied case-list delete paths act directly and do not show the same confirmation as case details. Do not assume every delete requires a second confirmation.

Keep the editable record and retained files

A generated report is a snapshot, not a complete restore of the app database. Keep required source evidence, supporting originals, and retained report/invoice copies. Deleting a case can discard narrative and financial records even though Evidence Locker items remain.

Item Details entry

The item Case Files manager can show View Current Case File, Remove from Current Case File, Use This Case File, View Case File, and Create New Case File. Use the control actually shown on your device. Changing an item's case relationship is different from applying client defaults to its metadata.

No verified case-count quota

The reviewed Apple case-list creation code does not impose a numerical case limit. This does not establish unlimited storage, performance, or synchronization capacity. Test the actual release with representative work.

03 Keep client, case, and item facts aligned

The strongest way to avoid a wrong client on an export is to assign the intended Client Profile explicitly in the Case File, then inspect the generated header and recipient. Do not rely on a case name or a guessed automatic match.

SETTING / CONTROL	WHAT TO DO AND WHY
Assigned Case File client	The report/invoice/email helper uses session.clientProfile first. Assign Client Profile or Change Client Profile sets this relationship.
Fallback matching	If no profile is assigned, the helper can match a profile Case Number to case-tag hints on linked items. If none matches, it falls back to the first fetched profile, generally most recently updated. This can be unrelated to the matter.
Case Number on output	The supplied report/invoice builders take Case Number from the selected/matched Client Profile. A case's working name is a different field. Preview both, especially for multiple matters for one client.
Individual item details	Purpose, tags, address, notes, and chosen date/time remain item values. Assigning the case client does not automatically rewrite those item fields.
Reusable rates	The billing editor loads enabled positive service rates from the chosen profile, with supported legacy rate fallback. Saved rates reduce repeated entry; quantities still have to be entered for actual work.
Reusable agency identity	Supported report and invoice paths read saved agency/prepared-by and company contact settings. Process Server Information, license details, overlay settings, report header, and invoice identity are distinct paths; no universal propagation is established.
Changing profiles later	Previously saved billing entries contain their own quantity/rate values. Do not assume reassigning the client or editing its rates reprices every saved line. Check each entry and regenerate output.

Several matters for one client need a case-number check

Reusing a profile is useful, but changing the profile's Case Number can affect later exports from other cases using that same profile. Verify each case's resulting Case Number, case name, client, recipient, and agreed charges. Do not invent a separate case-number field that these case editors do not expose.

A practical pre-export check

1. Confirm the assigned client.
2. Compare the working case name and profile Case Number with the assignment.
3. Inspect linked items for old client/case tags or incorrect facts.
4. Review billing entries under the correct rate agreement.
5. Preview the generated report and invoice, then check the recipient.

04 Link and organize the evidence

1. Import/scan supported material into Evidence Locker using the workflows in the earlier chapters.
2. In the case, select Add Media to Case File.
3. Use Display By and Sort By Date to recognize the available records. Select the intended items.
4. Choose Add, Add followed by the selected count, or Add [count] Selected as shown.
5. Check the case's Items list, then open and review the relevant item details.

SETTING / CONTROL	WHAT TO DO AND WHY
Display By	Media Type, Case Number, File Number, Client, or Address changes the identifying text shown in the add-media list. Case/file/client values are read from supported tag prefixes. This is a display option, not full-text search.
Sort By Date	The add-media picker sorts by createdAt. In case details, Newest First / Oldest First uses customTimestamp when present, otherwise createdAt. Different ordering between the lists can therefore be expected.
One case per item relationship	The source uses item.caseSession. Selecting an item already linked elsewhere can move that relationship to this case. It is not a verified multi-case alias system; check the previous case when reassigning shared evidence.
Photos / screenshots	The full PDF draws a visual evidence page and metadata for each eligible non-video item. Long notes can reduce the displayed image area.
Scans / PDF items	A PDF used as a normal evidence item is represented by its preview, commonly the first page. This is different from importing a PDF under Supporting Documents for appended pages.
Video	Videos are listed as separate attachments in case report output and are processed as separate files in ZIP. A PDF/Word report is not a playable copy of the clip.
Generated document items	The mobile case view separates itemType document into generated Supporting Documents. The Mac case view lacks the same dedicated classification. Inspect actual form/document output on each platform.

Keep capture facts distinct from later entries

Media from supported cameras, camcorders, drones, dashcams, doorbells, security systems, or Mail/Messages attachments must first reach a supported import path and process successfully. Embedded metadata can differ from manually entered dates, addresses, or notes. A case link does not validate those facts or make every playable file processable.

Before/after and surveillance records

Keep the sequence identifiable with accurate item dates, notes, tags, and Case Summary references. Do not assume list order alone proves the sequence or that burned text inside an image/video becomes searchable app text.

05 Write and review Case Summary

1. On iPhone/iPad, enter or paste the narrative in Case Summary. Changes save through the case context.
2. On Mac, choose Add Case Summary or Edit Full Summary. The full editor provides text selection, Clear Summary, and Done.
3. Write the assignment purpose, chronology, actions, observations, findings, and references to relevant evidence.
4. Compare names, dates, places, and conclusions with the actual items and supporting records.
5. Use Preview Full PDF Report and inspect the complete narrative pagination.

SETTING / CONTROL	WHAT TO DO AND WHY
20,000 characters	The supplied mobile editor, Mac full editor, and Word report path cap the summary at 20,000 characters. Extra pasted text can be truncated. Check the count and ending after paste.
Not a fixed page count	The mobile helper estimates approximately 11 to 15 typed pages, but actual page count depends on layout and text. Do not promise that range or a universal maximum report length.
Mac preview	Case details show a short summary preview, limited to eight lines. That preview is not the full stored narrative; open Edit Full Summary to inspect the rest.
Clear Summary	The Mac full editor clears the bound narrative. Preserve needed text before using it, then review and choose Done for the intended result.
Item notes	Individual item notes remain separate. The earlier media workflow has shorter photo/video note limits; they do not reduce or extend the 20,000-character Case Summary limit.
Report Title	Export Report As offers Case File, Investigative Report, Evidence Report, and Documentation Report. This saved preference is used for PDF/ZIP report cover pages, not a promise of the same title/layout in Word.

Keep the narrative factual and traceable

Distinguish observations from information supplied by others. Identify the actual media, service attempts, conditions, or work results. Adding a statement to Case Summary does not correct a wrong timestamp or address on an item, and selecting a report title does not validate the report's contents.

A useful structure

Use readable paragraphs for assignment background, dates/time periods, locations, actions taken, observations, outcomes, and supporting evidence. Add limitations or unresolved matters where relevant to the actual work. Adapt to the client's requested report style rather than forcing every assignment into one narrative template.

Build the record progressively

Update the same case after each work period while facts are fresh. Link the evidence, preserve supporting paperwork, and enter the actual charges. Reopen the generated file after saving; a complete-looking editing box is not proof that every output page is complete.

06 Attach supporting paperwork

1. In the case's Supporting Documents section, choose Add Supporting Documents. This file-picker path requires Pro.
2. Select one or more available files from the document picker. The declared types include PDF, plain text/text, RTF, DOCX, and DOC.
3. Confirm the filename and case assignment after import.
4. Open/share the stored document when needed and preserve the original source copy.
5. Choose an output that actually carries the required pages or separate files.

SETTING / CONTROL	WHAT TO DO AND WHY
Stored copy	Import copies the file into app storage and creates a case attachment record. These attachment files are not metadata-edited or overlaid by the case workflow.
PDF attachment	The report appender reads .pdf files and draws their pages into the report. Check readability, rotation, protected files, margins, and the actual number of appended pages.
Word / RTF / text	Can be retained as supporting files through the picker. They are not automatically converted into PDF report pages or opened as editable Form Generator fields.
Generated forms	A saved generated document linked to a mobile case appears in Supporting Documents. Its listing is different from proof that all its pages/files are included in an export. See page 8 for the supplied-source discrepancy.
Receipts and expenses	Attaching a receipt, hotel bill, repair order, or delivery record does not create an expense charge. Add the applicable billing quantity/rate separately.
Remove supporting document	The case-detail confirmation states that removal deletes the app-stored copy and case attachment, while the original source remains untouched. Preserve needed records before removal.
Mac Supporting Docs board	The Command Center has a Supporting Docs view with case holders and Drop supporting documents here. It accepts dropped file references from Finder. This is a distinct path from the case's Pro file picker and needs release access/format testing.

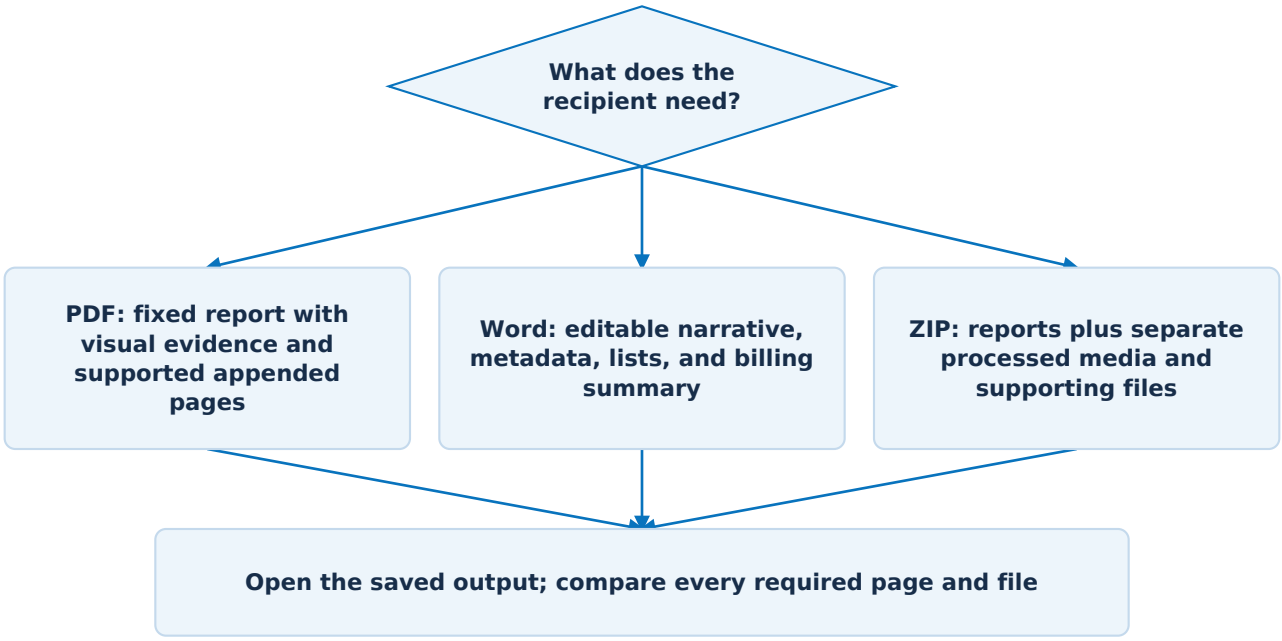
A filename in the list is not the attached content

A PDF/Word attachment list can name a file without embedding it. Inspect the chosen delivery for the actual document pages/files. Missing or unreadable files may be skipped by supplied output paths, so successful export alone does not prove completeness.

Files and iCloud Drive

Use documents available through the system picker, including Files/iCloud Drive providers where offered and accessible. Wait for the file to be available, then verify the app-stored copy. AirDrop, Mail, or Messages can help get material to a supported device location, but this case picker is not a promise of direct inbox import or arbitrary file processing.

07 Choose the right output



SETTING / CONTROL	WHAT TO DO AND WHY
Preview Full PDF Report	Builds the full case PDF for inspection. Pro required. Preview is separate from retaining or delivering a saved copy.
Preview Word Document	Builds the editable case Word document. Pro required. Case Word output is text/metadata and lists; it is not the visual PDF report in another file extension.
Export as PDF	Use the case Export menu. Produces the compiled report. Supporting originals can also be supplied as separate share/email attachments through supported post-export paths.
Export as Word Document	Exports the editable case report. Send required actual media/supporting files separately or verify them in ZIP.
Export as ZIP	Builds PDF and Word case reports plus separate evidence/video/supporting folders. Inspect the extracted package; it is not a database backup.
Preview / Export Invoice	Use for the invoice alone. The options sheet offers Preview Invoice PDF, Export Invoice PDF, and Export Invoice Word. This source does not expose a separate Preview Invoice Word button.

Invoice inclusion differs by format

Attach invoice to exported reports can append invoice pages to the case PDF, including the PDF inside ZIP. The case Word builder adds Billing Summary lines, not the full detailed invoice. The reviewed ZIP builder does not create a separate Invoice.pdf file; export that separately if the recipient needs it.

08 Check every PDF page and attachment

The normal case PDF builds a cover, any Case Summary pages, a page for each non-video report item, and attachment-list pages when needed. Readable imported PDF supporting documents are then appended, and an invoice can follow when enabled and billing entries exist.

SETTING / CONTROL	WHAT TO DO AND WHY
Photo evidence pages	Review the image and the metadata beneath it: item type, chosen date/time, filename, purpose, tags, address, and notes where available. Missing files can produce placeholders or File: Missing.
Long item text	The page layout adjusts media height for longer notes, but metadata drawing stops at the available page bottom. A 1,000-character note allowance does not guarantee every combination of notes/tags/address fits visibly on one evidence page.
PDF as normal item	The visual evidence page uses a preview, typically the first PDF page. For complete supporting pages, use the appropriate PDF attachment path and inspect all appended pages.
Supporting PDF pages	Appended pages are fitted into a Letter page with margins. They are not automatically rebranded or stamped with your own media overlay.
Page numbering	The base report total is computed before supporting PDF and invoice pages are appended. Check numbering and actual page count; do not promise one continuous Page X of Y sequence covering every attachment.
Invoice append failure	The appender can catch an invoice failure without stopping the report. Verify that the required invoice is actually present, or export/send it separately.

Mobile generated-document inclusion needs testing

In both supplied mobile PDF builders, the loop appending generated document PDFs is nested inside the imported-supporting-document loop. With no imported attachment, a generated PDF can be listed without its pages being appended; with several imported attachments, its pages can repeat. Do not promise complete or single-copy inclusion until the actual build is tested. Check and deliver the needed generated PDF separately if required.

Mac generated documents differ

The Mac case view does not use the mobile generated-document separation. A generated PDF linked as an ordinary item can instead receive the normal PDF-preview treatment. Verify full form pages independently rather than assuming the mobile and Mac output is identical.

Check contents, not just successful creation

Compare the final PDF against the source checklist: narrative ending, every evidence item, every required scan/form page, supporting documents, and the intended invoice. Open the retained file after export. A valid PDF with at least one page can still omit material you expected.

09 Word reports and ZIP contents

SETTING / CONTROL	WHAT TO DO AND WHY
Case Word report	Contains case information, prepared-by/date, Case Summary, evidence metadata text, supporting/video filenames, and optional Billing Summary. This case exporter does not embed photo images or the original supporting documents.
Word versus PDF appearance	The Word report is an editable working document with its own heading/layout. It does not reproduce the PDF cover, selected Report Title, company logo, or visual evidence pages.
ZIP report files	The supplied builder creates 00_Case_File_Report.pdf and 01_Case_File_Report.docx at the package root.
Evidence_Media	Still images are decoded/downsampled and rendered as documented JPEG copies using the current overlay settings. Other eligible non-video files are copied. This is not a promise of bit-for-bit original photo preservation in the package.
Video_Attachments	The ZIP path attempts to burn/export documented video copies through the video exporter and stores .mov results. A report's video filename is not the actual playable file.
Supporting_Documents	Imported supporting files are copied separately. The package retains their file format; it does not convert arbitrary Word/text files into report pages.
Missing / unsupported files	Several loops skip unresolved, missing, or undecodable source files. Video processing can fail. Compare extracted contents with the case list, open the media, and check audio as relevant.
Separate invoice	The package's PDF can include the invoice when enabled, but there is no separately created invoice file in the reviewed ZIP builder. Export Invoice PDF/Word separately when needed.

Mobile generated-document ZIP discrepancy

The loop copying mobile generated documents into Supporting_Documents is also inside the imported-document loop. Generated files can be omitted when no imported document exists or duplicated when several do. The Mac builder has no matching generated-document folder path. Verify each required form file in the extracted ZIP and deliver a separate verified copy when needed.

Retain original evidence separately

ZIP is a client delivery package of the files the builder successfully produces or copies. It is not a complete archive of original metadata, original photos/videos, all app settings, interview audio, or the editable case database. A General Statement's separate interview recording does not automatically join the case ZIP merely because its PDF is linked.

Editable delivery

Open DOCX in a compatible Word application and check text, tables, page flow, and completeness. Exported Word changes do not automatically update the Case File or its stored billing entries.

10 Enter actual work and charges

1. Assign the correct Client Profile and save the agreed enabled service rates there.
2. In the case, choose Add Billing Entry and wait for Preparing billing tools to finish.
3. Set Date and Description. Expand the applicable Billing Services category.
4. Select a service, enter the displayed Hours, Miles, or Qty, and choose Apply Quantity.
5. Repeat for the other services used. Leave unused services blank. Set Billable and Notes as appropriate.
6. Choose Save once to create the separate positive-quantity billing lines in this Case File.

SETTING / CONTROL	WHAT TO DO AND WHY
Enabled saved rates	The editor loads enabled rates greater than zero, sorted by their saved order. If none are available, add rates to the client profile before saving an entry.
Hourly	Quantity represents hours. Report Writing and Additional Professional 1/2 use separate accumulated hour fields; other hourly services use the primary hours field.
Distance	Quantity is shown as Miles in this editor. Enter actual applicable mileage and a rate in the same unit. Route Planner estimates do not fill it automatically.
Expense / flat services	The source still multiplies quantity by the selected saved rate. Expense uses Qty; other non-hour/distance types use Qty. Inspect the displayed rate rather than assuming the entry is an unrestricted dollar-amount override.
Billable	Off preserves an entry with a calculated invoice amount of zero. It is excluded from the case's billable summary totals, but the invoice builder still maps all entries and can display the non-billable line.
Edit a line	Open the existing billing entry and its service quantity. Check service, rate, date, description, notes, and Billable, then Save. The editor can use current profile rates; do not assume the historical amount remains unchanged.
Delete a line	Use the billing-entry delete control and confirmation in case details. Review totals again after changes.

Rates are reusable; work is case-specific

Saving a rate does not record time, mileage, a service, or an expense. The entry editor copies quantity/rate/service details into saved lines. Reopening an old line after profile-rate changes can select a current matching rate or fallback service, so inspect before saving.

Receipts and charge entry are separate

For an actual $80 reimbursable expense, use an appropriate agreed rate/quantity combination that totals $80 and a clear description, then attach its receipt separately. Confirm your client agreement and preview the result. Do not assume attaching an $80 receipt adds $80 to the invoice.

11 Understand the calculations

For a billable entry with positive quantity and rate, the displayed amount is quantity multiplied by rate. Otherwise the helper can use the saved totalCalculatedAmount. Non-billable entries contribute zero to invoice amounts. Case summary totals use billable entries only.

SETTING / CONTROL	WHAT TO DO AND WHY
Total Hours	Case details add primary and Additional Professional 1/2 hours. Report Writing Hours are shown separately there. Mac Billing overview's Billable Hours includes report-writing time too.
Total Mileage	Sum of the billable entries' stored mileage quantities. It is not an automatically recorded vehicle trip.
Incidentals	Sum of the billable entries' expense/incidentals amounts. A saved supporting receipt alone contributes nothing.
Estimated Billing Total	Sum of billable line amounts before the invoice-level discount. A case total and a discounted invoice total can therefore differ.
Invoice subtotal	Sum of the mapped invoice-line amounts. Non-billable lines can be present with zero amount.
Discount	The invoice percentage is constrained to 0-100. Discount amount = subtotal x percentage / 100. Estimated Total = subtotal minus discount, with a minimum of zero.
Whole-invoice effect	Discount applies to the entire subtotal, including mileage, incidentals, report writing, and other entries. For selected-service discounts, adjust the applicable service agreement/entries instead of applying a blanket percentage.

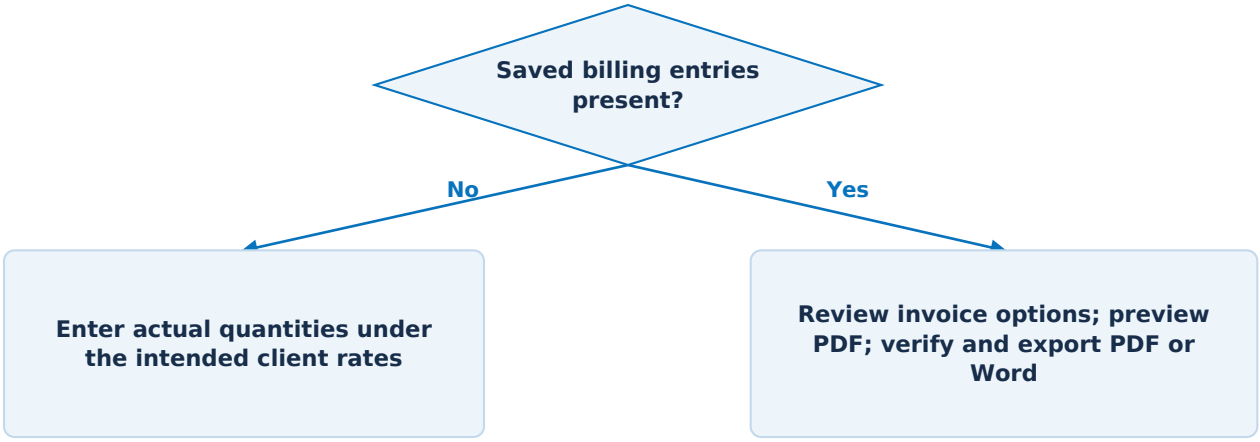
Worked example using illustrative agreed rates

SETTING / CONTROL	WHAT TO DO AND WHY
Field work	3 hours x $100 = $300
Report writing	0.5 hour x $80 = $40
Mileage	40 miles x $0.50 = $20
Expense	1 quantity x $30 = $30
Before discount	Subtotal / Estimated Billing Total = $390
10% whole-invoice discount	$390 x 10% = $39 discount; invoice Estimated Total = $351

Quantities and terms still need review

The reviewed workflow does not automatically enforce your minimum hours, emergency/holiday multipliers, travel policy, retainer credit, taxes, payment status, or collection terms. Record the agreed charge appropriately and check the invoice rather than assuming those business rules are calculated for you.

12 Prepare the invoice deliberately



1. Select Preview / Export Invoice. Pro and at least one saved billing entry are required.
2. Review Payment Link, Invoice Note, Discount label, and Discount percentage.
3. Choose Preview Invoice PDF and inspect the result. Return to the case/options as needed.
4. Choose Export Invoice PDF or Export Invoice Word, then check the actual exported file and recipient.

SETTING / CONTROL	WHAT TO DO AND WHY
Initial values	Opening the options sheet resets the note to blank, starts the payment link from the global invoice default, and loads the matched profile's default discount. Recheck after reopening.
Payment link	A temporary link can override the global default for the current options state. A blank value falls back to the default. The file displays Pay Online text; this workflow does not process payment or confirm payment received.
Invoice Note	Optional payment/invoice wording. A blank note resolves to Thank you for your business. The sheet says temporary payment text is not permanently saved to the client profile.
Invoice identity	The builder creates a new short random invoice number and current invoice date for each build. Preview and a later export can have different identifiers. Retain the actual issued copy.
Attach invoice toggle	Attach invoice to exported reports is separate from exporting an invoice alone. Preview the resulting full PDF. Word receives a summary, not this detailed invoice.

Large invoice PDF needs special review

The supplied invoice PDF renderer creates one page and stops drawing rate/entry rows after vertical thresholds. It does not paginate those rows. A long invoice can omit visible lines while its total still includes all mapped amounts, and lower sections can overflow. Inspect every charge, total, note, and link. Use and inspect editable Word output when a complete PDF cannot be verified.

13 Branding and client delivery

1. Review Global Settings for agency name, prepared-by name/title, company contact fields, and supported PDF header/logo settings.
2. Preview the actual case PDF and invoice separately. Their identity/layout paths differ.
3. Export the intended PDF, Word document, ZIP, or invoice.
4. If Export Ready appears, choose Email Client or Share Normally as appropriate.
5. Review recipients and all attachments in the chosen app, complete delivery, and retain/open your own copy.

SETTING / CONTROL	WHAT TO DO AND WHY
PDF report cover	Uses the PDF header company name when set, otherwise agency name, plus supported phone/email/website, prepared-by data, and client context. Logo loading requires Pro, header enabled, and a readable saved image.
Invoice identity	Uses agencyName and company contact/prepared-by values. InvoiceData has no logo field in this exporter. Do not promise that the PDF report logo or letterhead appears on invoices.
Media overlays	Agency stamp, professional/license lines, and metadata overlays have separate settings and output behavior. They are not a universal header applied to every supporting page or Word document.
Email Client	Requires configured Mail, a matched profile, and a nonblank email address. Saved email subject/body defaults and signature lines can be used. Review them; automatic fallback matching can select the wrong profile if the case is unassigned.
Share Normally	Opens available Apple sharing destinations. Save to Files/iCloud Drive, Mail, Messages, or AirDrop may be offered depending on device, file type, and installed services. Complete the action at the destination.
Separate supporting files	For the full case PDF post-export path, helper code can add supporting originals alongside the report. Word/invoice/ZIP handoffs use different attachment rules. Verify the actual attachment list rather than assuming every share path includes everything.

A share sheet is not a delivery receipt

Check that the final message/upload was completed and that the recipient can open the files. Email/messaging/file providers have their own size and access limits. Preserve the actual sent/issued report and invoice; regenerating can change invoice identity and output content.

Mac export destination

These case exporters build temporary files and use their case share/email flow. Do not assume the Global Settings Desktop Export Folder automatically receives every case PDF, Word, ZIP, or invoice. Confirm the retained destination explicitly. Test the Mail/share handoff on the installed Catalyst build.

14 Mac tools, iCloud, and search

SETTING / CONTROL	WHAT TO DO AND WHY
Mac Reports	Reports lists cases with summary text, evidence items, or supporting documents as Reports In Progress. Its flag marks High priority for that view; it is not an automatic deadline or report-completion status.
Mac Billing	Active Invoices lists Case Files that have billing entries. Counts/totals summarize stored work, not payment collection, sent invoices, or unpaid balances. Open a case to edit and export.
Mac Supporting Docs	Provides draggable case holders and a file-drop area. Holder positions and Reports priority flags use local preference storage in the reviewed code; their cross-device sync is not established.
Shared case data	Case relationships, summaries, billing, and attachment records use Core Data. Persistence configures CloudKit. Eligible data is intended to update on supported devices using the same iCloud account when available/enabled.
Not a universal mirror	The ZIP lacks the Xcode project and Core Data model needed to confirm production CloudKit entity/asset coverage. A synced record or filename does not prove the media/document bytes arrived and open on the other device.
Family Sharing	Subscription access is separate from case/evidence sharing. Different family members' iCloud accounts are not merged into a shared agency database. Verify App Store subscription-sharing configuration before publishing eligibility claims.
Case screen search	No full-text search control is exposed by the reviewed case lists, add-media picker, Mac Reports, or Supporting Docs board. Display By, sort options, and client-matching helpers are not a global evidence search engine.

Be precise about searchable content

Descriptive exported filenames can help you identify files in Files/Finder or another destination's supported search. Word narrative and metadata are text, but external indexing depends on the viewer/provider. Do not promise that photo/video overlays, scanned PDF contents, attachment contents, Case Summary, or every app field are automatically indexed everywhere.

OCR is a separate workflow

The earlier Import Media chapter describes the actual OCR controls and limits, including the reviewed first-PDF-page extraction path. OCR text or a Find result on that screen does not establish case-wide document-content search or automatic indexing of all burned text.

Continue on another device

Before using a synced case, compare the assigned client, name, summary ending, item/document counts, and billing lines, then open the actual files and preview an export. Resolve missing/stale material before delivery. Do not delete the working copy as a sync test.

15 Field workflows that fit the case record

Property condition, before/after, and repairs

Create a case for the property/assignment. Link condition photographs and supporting work orders, identify before/after dates and locations, and write what changed in Case Summary. Enter actual time and agreed expenses separately. Preview the visual PDF and ensure all required supporting pages are present.

Vehicle condition before towing or repossession

Keep the vehicle identifiers and observed condition with the correct item/case record. Link the exterior/interior evidence and relevant paperwork, then report the actual sequence and outcome. Use a verified package for separate video files. Case organization does not validate ownership, legal authority, or the capture metadata.

Doors, locks, proof of work, and incidents

Record the condition before locksmith or repair work and the resulting condition afterward. Link the work authorization, receipt, signed document, or incident material as applicable. Preserve individual observations and a case chronology without assuming every note appears in full on one evidence page.

Surveillance and multi-day assignments

Add time shots and relevant imported clips to the existing case over the work period. Keep dates, observations, and limitations accurate. Record field hours, report-writing time, mileage, and applicable incidentals. PDF/Word can describe video, but deliver and verify the separate playable clips when required.

Service of process and several destinations

Use Route Planner for travel and record each actual attempt/outcome in the case. Attach required address photos, returns, due-diligence paperwork, or statements through their supported paths. A completed route row does not create a return or billing line. Check generated-form attachment handling before relying on the compiled PDF/ZIP.

Deliveries and one client with many cases

Use separate Case Files for separate matters even for the same client. Reuse agreed profile rates and agency identity where supported. Check each case reference, recipient, supporting proof, charge, and export. At one address with multiple papers/deliveries, document each matter's outcome separately rather than using one route mark as proof for all.

A complete delivery can require more than one file

The recipient may need a fixed PDF report, an editable Word narrative/invoice, separate videos, signed forms, supporting originals, and statement audio. Choose supported outputs, compare the actual contents, and provide required separate files deliberately. No single export is a verified substitute for every original record.

16 Review limits and get help

SETTING / CONTROL	WHAT TO DO AND WHY
Confirmed narrative limit	20,000 Case Summary characters. Individual photo/video note limits are separate. Case report helpers limit item-note text to 1,000 characters, while page space can impose an additional visible-layout limit.
No verified universal page cap	No fixed full-report-page limit was found in the reviewed case builders. That does not establish unlimited output; representative large cases must be tested on each platform.
Invoice PDF limit	One-page renderer with row thresholds, not automatic multi-page billing pagination. Inspect all lines and lower-page content.
Missing files / skipped content	Confirm actual source availability and every output page/file. Valid output can still contain placeholders or omissions.
Mobile generated forms	Test PDF append and ZIP copy with zero, one, and several imported supporting documents. The nested-loop discrepancy can omit or repeat generated files/pages.
Mac differences	Test generated PDFs linked as evidence, full summary editing, board drops, Pro enforcement, and Mail/share output. Shared data does not prove identical generated output.
Persistent options	Report title is a saved preference. Invoice note/link/discount edits are view state that can reset when invoice options reopen. Do not assume all temporary choices are durable case fields.

Files and device evidence still needed

Obtain the matching .xcodeproj/project.pbxproj and .xcdatamodeld plus release subscription/configuration evidence. Test Free/Pro behavior, case creation/removal/deletion, profile fallback, multiple cases for one client, 20,000-character paste, long item text, all attachment formats, generated forms, missing/protected files, video/audio, PDF numbering, Word/ZIP contents, many invoice lines, discounts, repeated preview/export invoice IDs, same-account sync, and iPhone/iPad/Mac share delivery. Current screenshots and sample exported files are needed before final publication.

Source review: CaseSessionsView; ItemCaseSessionManager; CaseSessionDetailView and Media/Helpers/Types extensions; DesktopCaseSessionView and DesktopCaseSessionDetailView; BillingEntryEditorView; CaseSummaryFullEditorView; CaseSessionReportPages; FinalExhibitDOCXExporter; FinalExhibitInvoiceDOCXExporter; Desktop Billing/Reports/Supporting Documents; persistence and entitlements. Android Case Files PDF used for presentation reference only.

Help or a personal walkthrough

Email **support@finalexhibit.com** or message **Final Exhibit on Facebook**. Include the device, output type, approximate case/file size, and exact error or missing content. Suggestions for additional forms and field workflows are welcome. Describe the workflow without sending confidential case material unnecessarily.