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# **Triage intake and summarize contracts faster**

AI tools for solo and small firms: intake triage, document summary, and client email in one workflow

About 8 minutes of slides · Three live demos on the platform (~7 minutes)



Presented by: Mohd Naeem, Founder & CEO

25+ years in development, architecture, and DevSecOps. Enterprise experience, built for small business teams

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# Agenda

What we will cover in the next few minutes

Section	Topics	Time
1	Problem · What we built · Keep what works · Sound familiar · How it works	~3 min
2	Three walkthroughs: Intake · Reminders · Bulk Email (scenario, solution, demo on each slide)	~8 min
3	Common questions · Pilot · Pricing · Why trust us · AI Platform tech stack	~4 min
4	Your next step · Q&A	Open



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## The problem

Tackle the daily work that slows you down

## AI built for your industry

- ✓ We augment your existing tools (practice management and document storage). We do not replace them.
- ✓ Intake, summaries, and client updates in clear steps, not a blank ChatGPT tab
- ✓ Same workflow every time. Upload once, move to the next step. No re-typing between apps
- ✓ Human review before every send. Drafts only, not autopilot.

## What we solve

### **Time · Money · Priority**

- ✓ Time: hours back on intake triage and contract summaries
- ✓ Money: matters won when serious leads get a fast, professional reply
- ✓ Priority: finish client updates that pile up between billable work



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## What we built

One login, law apps, and everyday business tools

### Your company workspace

- ✓ One business account
- ✓ Law industry chosen once
- ✓ Team logins by plan

### Legal Apps

- ✓ Intake triage and document summarizer
- ✓ Clause risk, client communication, research

### Everyday Tools

- ✓ Client Relationship Reminders and Bulk Email Processor
- ✓ Documents and case timelines

## How It Feels on Intake Day

- ✓ Open Triage new inquiries, run step one, tap Continue. The next app opens with your draft.
- ✓ Intake Triage, Legal Document Summarizer, and Client Communication Assistant: same path every matter
- ✓ Your admin connects your AI account once (OpenAI, Together, Groq, xAI, and more)
- ✓ We augment your existing tools (practice management and document storage). We do not replace them.



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## Keep what already works

Your existing tools, plus a writing and email layer

### Your practice management

Matters, billing, and client records stay where they are

### Document storage & e-sign

Your existing file systems and portals

### EZ4YouTech.com

Intake notes, summaries, and client email. Same path each time.

We augment your existing tools (practice management and document storage). We do not replace them.

Better Intake · Faster Summaries · Clients Stay Informed



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## Sound familiar?

Many firms paste inquiries and contracts into ChatGPT with no audit trail

### Free ChatGPT or Copilot

- ✗ Open a blank chat and re-explain the matter every time
- ✗ Copy triage notes, summary, and client email in separate steps
- ✗ **Free ChatGPT or Copilot may use your prompts for training and model improvement**
- ✗ **You are tied to one provider and one personal account**

### With EZ4YouTech.com

- ✓ One intake workflow: same steps every time with Continue
- ✓ Triage new inquiries: Intake Triage, Legal Document Summarizer, Client Communication Assistant
- ✓ **Your company workspace and your AI accounts. We do not train on your client data**
- ✓ **Your admin connects your provider once: OpenAI, Together, Groq, xAI, and more**



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## How it works

Three steps for your team. No IT project required.

**1**

### Connect once

- ✓ Your admin links your company's AI account once
- ✓ The whole office shares one secure workspace

**2**

### Triage New Inquiries

- ✓ Intake Triage → Legal Document Summarizer → Client Communication Assistant
- ✓ Tap Continue between steps. Same path every matter.

**3**

### Try free

- ✓ 2-month pilot with platform fee waived
- ✓ Test on real inquiries before you decide

You pay your AI provider directly. Our fee covers the apps and workspace, not your token usage.



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# Walkthrough 1: Triage New Inquiries

## Scenario 1

A new inquiry arrives. You need triage and a summary before billable time.

- ✗ Serious leads hide in spam while you read every email twice.
- ✗ 30-page vendor contracts need bullets before you advise the client.
- ✗ Status emails stall because drafting takes longer than the call.

## Solution 1: Intake Workflow

Three steps, same path every matter.

- ✓ 1 · Intake Triage: Priority score and triage notes
- ✓ 2 · Legal Document Summarizer: One-page bullet summary
- ✓ 3 · Client Communication Assistant: Client status email draft

Triage the inquiry, summarize the document, and draft a client update in one path.

## Demo 1: Triage New Inquiries

Live on the platform · About 3 minutes · Starter plan and above

- ✓ Open Triage New Inquiries
- ✓ Intake Triage, Legal Document Summarizer, Client Communication Assistant
- ✓ Tap Continue between steps. Same path every matter.



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Better Intake · Faster Summaries · Clients Stay Informed



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# Walkthrough 2: Client Follow-Up

## Scenario 2

Birthdays and anniversaries slip when daily billable work stacks up.

- ✗ You mean to send birthday notes, but client work wins every week.
- ✗ Each email is written from scratch or copied from an old template.
- ✗ Your CRM has the dates. Turning them into send-ready drafts still takes time.

## Solution 2: Client Reminder Workflow

Three steps from CSV to sent email.

- ✓ 1 · Upload CSV: Rows ready for draft generation
- ✓ 2 · Review Drafts: Edit anything before you approve
- ✓ 3 · Send: Send approved emails from your account

Review drafts, send all due reminders, or set auto-send and forget the follow-up pain.

## Demo 2: Client Reminders

Live on the platform · About 2 minutes · Growth plan and above

- ✓ Open Client Relationship Reminders
- ✓ Upload your client CSV and review draft emails.
- ✓ Approve and send from Microsoft 365.



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Stay in Touch · Clients Feel Remembered · Less Manual Typing



# Walkthrough 3: Inbox Backlog

## Scenario 3

Saved emails and replies pile up faster than you can write them.

- ✗ Leads and client threads wait in your inbox or saved folder.
- ✗ Starting each reply from scratch eats the hour you needed for client work.
- ✗ Copy from ChatGPT still means paste, fix tone, and send one at a time.

## Solution 3: Bulk Email Workflow

Three steps from inbox to sent replies.

- ✓ 1 · Import: Messages queued for drafting
- ✓ 2 · Review Drafts: Edit any message before you approve
- ✓ 3 · Send: Send from Microsoft 365

**Batch draft replies, approve once, send from your inbox.**

## Demo 3: Bulk Email

Live on the platform · About 2 minutes · Full plan and above

- ✓ Open Bulk Email Processor
- ✓ Upload saved emails or sync inbox, review AI drafts
- ✓ Approve the batch and send.



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Clear the Backlog · Faster Replies · Less Copy-Paste



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## Common questions

Plain answers we give attorneys and firm owners

### Already using ChatGPT?

- ✓ Same workflow every time, not a blank chat each time
- ✓ Steps connect in one company workspace, not personal chats

### Why another subscription?

- ✓ Our fee covers apps and workspace, not AI usage
- ✓ You pay your provider directly; 2-month pilot waives platform fee

### We have practice management software

- ✓ Keep those tools. We finish triage, summaries, and client email
- ✓ Paste our drafts into your PM system as you do today

### Which plan fits us?

- ✓ Starter: Setup admin + up to 2 app users
- ✓ Growth: up to 5 users · Full unlocks Bulk Email Processor



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# Plans and Founding Rates

Free 2-month pilot · Founding rates for our first 50 customers

Plan	Regular	Founding	Team
Starter (Basic)	\$39	\$29	Admin + up to 2 app users
Growth (Standard)	\$59	\$49	Up to 5 app users
Full (Elite)	\$119	\$99	Up to 10 · Bulk Email Processor included
Enterprise	From \$199	From \$149	Up to 25 · contact us

AI usage is billed by your provider, not included in the platform fee.  
Yearly billing saves one month · See [ez4youtech.com/pricing](https://ez4youtech.com/pricing)

## Try free for 2 months

- ✓ Platform fee waived on Starter, Growth, or Full
- ✓ We help your admin connect AI once
- ✓ Run all three live demos on real work
- ✓ Founding rates lock for early adopters



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## Why trust EZ4YouTech.com

Built by a cloud developer and architect for small business teams

### Founder credibility

25+ years in development, Architecture and DevSecOps, now for SMB.

### Your data stays yours

Your AI accounts, your rules.  
We do not resell prompts.

### Real apps, not chat

Clear steps each day.  
Tap Continue to open the next app.

### Start small

Try free first, then add users and apps when you are ready.

Mohd Naeem, Founder & CEO | EZ4YouTech.com LLC | Frisco, TX | USA production platform live May 2026



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# AI Platform Technology Stack

For Technical Audience · USA production posture · May 2026

Layer	Technology	Role
Edge and TLS	HTTPS	ez4youtech.com and aiplatformusa.ez4youtech.com
Application	FastAPI + Streamlit	REST API and agent or admin UI
Compute	Azure Container Apps	Health checks and tagged releases
Secrets	Azure Key Vault	JWT, encryption keys, Mongo URI
Database	MongoDB Atlas (M10)	Tenants and encrypted BYOS credentials
Storage	Azure Blob	tenant_id/ paths for documents
Email	AWS SES · Turnstile	Contact form delivery and CAPTCHA
AI routing	BYOS multi-provider	OpenAI, Together, Groq, xAI, and more

Enterprise-ready architecture. No SOC 2, ISO 27001, or HIPAA claims unless agreed in writing. Shared multi-tenant SaaS with logical isolation per tenant\_id.

Full detail: [ez4youtech.com/security.html#technology-stack](https://ez4youtech.com/security.html#technology-stack)



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## Your next step

Book a walkthrough or try the platform on your next inquiry

**1**

**Book a 30-minute demo**

ez4youtech.com/contact  
or call us

**2**

**Try it free**

2-month pilot; we help  
with setup

**3**

**Run your next intake**

Triage new inquiries on  
the platform

**4**

**Run it on real work**

Triage, summary, client  
update with Continue

30-minute demo · 2-month free pilot · [connect@ez4youtech.com](mailto:connect@ez4youtech.com) · +1 (214) 404-2319

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## Q & A

### Quick answers, then your questions

#### How is this different from ChatGPT?

- ✓ Same workflow every time. Steps connect with Continue. Work stays in your company workspace.

#### Do you replace our existing software?

- ✓ No. We augment your practice management and document tools.

#### What about client reminders and bulk email?

- ✓ Client Relationship Reminders and Bulk Email Processor are on the platform today, on higher plans. We demo both live.

#### What does it cost after the free trial?

- ✓ Platform fee from \$29–\$99/mo founding rates; AI usage is billed by your provider separately.

#### Which plan fits a small team?

- ✓ Starter: Setup admin + up to 2 app users. Growth: up to 5. Full adds Bulk Email Processor for larger teams.

#### Is my client data safe?

- ✓ Your AI accounts and rules stay yours. We do not resell prompts. Your admin connects providers once.

#### How long does setup take?

- ✓ About 15 minutes for admin to connect AI once; attorneys can run intake the same day.

**Still have questions? Ask us anything: [connect@ez4youtech.com](mailto:connect@ez4youtech.com) or book a 30-minute demo.**



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# Thank you

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