

LexSteward

The full feature list

Feature list as of October 2, 2026. Every feature is labeled with an honest status.

Status legend

Live - Usable today by a real firm.

Activates with your account - Built; switches on once the firm connects its account or a connector.

Preview - Demo-grade, rolling out, or tier-gated. Not live for everyone yet.

Roadmap - Planned or spec-only; not built yet.

Get Found

Marketing and acquisition - be the firm clients find on Google and in AI search.

Live

Practice-area pages

Owned, AI-optimized pages for each practice area and jurisdiction, with clean structured data.

Fifteen practice-area pages, each with its own JSON-LD so search and answer engines can read and recommend your firm.

Live

Legal calculators

Client-side benefit and cost estimators that turn a visitor into a lead.

Twenty-six-plus calculators; they compute in the visitor's browser with zero data retention - only the contact request the visitor chooses to send leaves the page.

Live

AEO Audit tool

A free AI-visibility audit with scored, prioritized fixes - no account needed.

Enter your public firm details and get a scored, explained audit of how AI search sees you.

Live

AI intake form

A conversational, branching intake that qualifies a lead and relays it to the firm.

Config-driven flow; the only network call is the lead relay.

Live

Templates & precedents

Engagement, retainer, and demand-letter templates ready to use.

Live

Comparison pages

Honest, sourced cost-and-feature comparisons versus other practice-management systems.

Category-based, sourced, and non-disparaging.

Preview

Marketing control center

Firm-side control of your pages, copy, and offers.

Routers exist but it is demo-grade and not yet in the main dashboard.

Roadmap

SEO / Get-Found control center

AEO monitoring, local SEO, a content loop, and the review flywheel in one place.

Spec written; not built yet.

Roadmap

Local presence (GBP / NAP / reviews)

Local citation and review automation for your Google Business Profile.

Modules exist but there is no UI yet; activates with a Google connector once shipped.

Preview

Partner / referral system

A firm network with referral tracking.

The model is built; the marketplace is building.

Run Every Case

The operating system of record - intake to resolution, plus firm admin.

Live

Matters lifecycle

The system of record for matters - stages, parties, and key dates.

Live

Contacts / CRM

An address book with relationship links and conflict screening.

Live

Conflict-of-interest screening

Automated conflict screening at intake and matter open, with an immutable determination that blocks engagement until cleared.

Phonetic and alias name matching across clients and adverse parties, adverse-party detection, and ethical-wall screening - each recorded as an immutable determination. Related-entity graph resolution is on the roadmap.

Live

Calendar / docket

Month, week, and agenda views with events and reminders.

Live; rule-derived deadline cascades are in Preview (see the deadline / rules engine).

Live

Tasks & workflows

A task board with a configurable workflow engine and approval queue.

Live

Documents / DMS

Encrypted document storage with version history, filed to the matter.

Encrypted at rest with your firm's key and downloadable from the matter at any time; durable storage that keeps files across a platform deploy is not live yet and lands before general availability. Live; e-signature is on the roadmap (see E-signature / RON), and all-media evidence management is in Preview (see Evidence management).

Preview

Evidence management (all media)

Every file type filed to the matter - video, audio, images, and documents - with evidence-grade chain of custody.

All-media capture with write-once originals, a cryptographic chain-of-custody log, hash-on-ingest, preserved metadata, legal hold, and per-firm encryption; OCR, transcription, and redaction follow.

Rolling out; real client media rides the compliance go-live gate.

Live

Client communications timeline

One per-matter timeline of client communications - email, portal messages, and logged calls and meetings.

Captures client emails (forward-to-matter with deterministic attribution), portal messages, and logged calls and meetings into a single matter timeline. Automatic voice capture, two-way texting, and direct mailbox sync (Microsoft 365 / Google) ride their provider gates (see Voice / call capture and Client SMS).

Live

Time tracking

Manual and timer-based time entry with narratives.

Live; AI-proposed draft time entries are in Preview.

Live **Billing (earned-fee)**

Invoices, expenses, payments, and pre-bills - earned-fee only.

Earned-fee billing only; explicitly not a trust ledger (see Trust / IOLTA accounting).

Live **Reporting & analytics**

Revenue, realization, A/R aging, and conversion KPIs.

Live **Data import / migration**

Guided import from CSV, Excel, JSON, and a document zip, with field mapping, a dry-run preview, and a rollback.

Imports matters, contacts, notes, key dates (as unconfirmed events), custom fields, and documents (matched into the encrypted DMS), with a dry-run preview and a rollback. Step-by-step export guides for Clio and MyCase ship today; direct live-API adapters for those systems are on the roadmap.

Live **Practice Hub**

Per-practice-area coverage with a verification queue.

Live **Practice Primer / pack generator**

Auto-drafts a practice pack for attorney verification before go-live.

Live **Document automation / forms**

Learn a form once, confirm the field map, and auto-fill it on any matter.

Refuses to recreate mandatory official forms.

Live **Practice intelligence feeds**

Monitors secondary legal sources into a review queue.

Items stay labeled unverified until an attorney reviews them.

Preview **Deadline / rules engine**

Rule-based deadline calculation with an attorney-verification pipeline.

The engine is built, but no jurisdiction is attorney-verified or shipped yet - it does not emit confident dates until counsel signs off.

Preview **Shared verified library**

Verified, content-free pack scaffolds shared across firms.

Behind a UPL / E&O sign-off gate before real-firm go-live.

Preview **Trust / IOLTA accounting**

A trust-ledger engine with three-way reconciliation.

Flag off; activates per jurisdiction after CPA and bar review.

Preview **Litigation readiness**

UTBMS/LEDES e-billing and e-discovery support.

Flags off; synthetic data only today.

Roadmap **Physical-doc orchestration**

Reads an inbound notice, extracts dates, and proposes a deadline cascade.

Extraction is built; vendor wiring pending.

Roadmap **E-signature / RON**

E-signature and remote online notarization.

Behind the NY SB 1780 gate.

Roadmap **Voice / call capture**

Turns a call into a conflict-screened lead and dictation into a draft time entry.

Twilio / A2P gated.

Roadmap **Attorney continuity deadlines**

CLE, bar, and pro-hac-vice deadlines with break-glass coverage.

A business / scope decision.

Live **Roles / RBAC + ethical walls**

Custom roles, per-matter access, supervision, and an access map.

Live **Team & onboarding**

Invite staff, assign roles, and follow guided onboarding.

Live; offboarding automation is in Preview.

Live **Settings / firm config**

Firm profile, packs, rates, numbering, and custom fields.

Live; advanced config is in Preview.

Live **Scheduled automation**

Opt-in background jobs for reminders and alerts.

Roadmap **Governance control centers**

Recovery, governance, access/walls, audit, compliance, finance, client-experience, and growth control centers.

Specs written; which are built is being confirmed.

Preview **Enterprise suite [Enterprise]**

An in-house front door, proposals, account-based marketing, and outside-counsel review.

Surfaces are live; the workflows are building. Enterprise tier.

Ward Runs It With You

Your governed AI chief of staff - it proposes, you approve.

Live **Ward / chief of staff**

One governed assistant across the firm - it proposes, you approve.

The core assistant is live; advanced action surfaces are in Preview.

Live **Case-file RAG**

Grounded Q&A and summaries over a matter's documents.

Preview **Smart AI routing**

Routes each task to the right model so heavy work is metered, not billed by surprise.

Rolling out. Today all work runs on the same BAA-backed frontier model; tiered routing is building.

Preview **Matter intelligence / doc-set analysis**

Cross-matter status and risk with structured extraction.

Matter-level AI is live; cross-matter analysis is building.

Roadmap **Ward grounding & citation layer**

Every answer shows its sources - "show your work."

Spec written.

Roadmap **Proactive obligation view**

A continuous, forward-looking view of your obligations.

Spec written.

Preview **Confidential AI**

A privilege ledger with in-app redaction.

Flag off.

Roadmap **Comms track-changes + voice learning**

Differs Ward's draft against your edits and learns your firm's voice.

Spec written.

Your Clients Love It

A firm-branded client experience that markets itself.

Preview **Client portal (web)**

A firm-branded portal for status, documents, and invoices.

The web surfaces are live and rolling out.

Live **Two-brand client surfaces**

Your client sees your firm's brand; LexSteward stays invisible.

Preview **Client-Ward mode**

A scoped client-facing assistant - Full, Limited, or Off - that never gives legal advice.

Off by default; the firm controls the mode.

Activates with your account **Payment links / no-login pay**

A passwordless pay link so clients can pay by card.

Built; activates with the firm's payment account.

Roadmap **Client SMS / two-way texting**

Status and reminders with inbound replies filed to the matter.

Behind an A2P provider + DPA gate.

Private by Default

Governed AI, isolation, and ownership - privilege-grade by default.

Live **Governed AI (no training, no retention)**

AI runs under a BAA in a confidential, zero-data-retention environment - never a consumer chatbot.

Live: BAA-hosted frontier model in a confidential, zero-data-retention environment, per-firm isolated and fully logged. A self-hosted governed model is on the roadmap.

Live **Per-firm encryption (AES-GCM)**

PII and content encrypted with a per-firm key.

Live; the customer-managed-key (CMK) go-live gate is still open.

Live **Data residency at signup**

An immutable region set at signup - US today, region-pinned and fail-closed.

US only today: the region is pinned at signup and enforced in-app. Canadian residency, and physical in-region storage down to backups, are on the roadmap (both ride the residency go-live gate).

Live Multi-tenant isolation

Every query is firm-scoped.

Live; a database row-level-security backstop is planned.

Live Export / ownership

Export your matters, contacts, time and billing anytime, across every module. No lock-in.

On-demand export is live for matters, contacts, time and billing. Documents download individually from their matter today; bulk document export is not live yet and lands shortly. Scheduled self-export delivered to your own storage activates with the backup/DR gate.

Roadmap Backup & recovery

Continuous backup, an immutable copy, and tested restore - on the roadmap, not running yet.

Not running yet. On-demand export is live today (see Export / ownership); scheduled backup, immutable copies and tested restore ride the backup/DR gate.

Preview SSO (SAML / OIDC) [Enterprise]

Single sign-on for enterprise identity providers.

Configured in the portal; live federation with your identity provider is rolling out. Enterprise tier, scoped per deployment.

Live Audit trail

An append-only log of material changes.

Live Vendor pass-through (BYO)

Connect your own vendor accounts; DPA and residency checks fail closed.

The framework is live; specific adapters vary.

Preview Device trust / remote sign-out

See known devices and revoke a session mid-use.

Design complete; wiring in progress.

Preview Sovereign / BYO-KMS / zero-knowledge [Sovereign]

You hold the key - single-tenant, on-prem, or air-gapped, delivered by engagement.

Design-only today; the Sovereign tier is not live. Any zero-knowledge wording is reserved to this tier and must stay conditional until it ships.

Roadmap SOC 2 / HIPAA / PIPEDA

Third-party security and compliance certifications.

Referenced as roadmap; not yet obtained.

Roadmap Assisted redaction / de-identification

Mask PII before sharing or sending to AI, and harden intake de-identification.

Spec written.

Disclaimers

LexSteward is a legal-technology platform, not a law firm, and does not provide legal services or advice. Security and compliance certifications referenced as roadmap items are not yet obtained. Sovereignty and data-residency guarantees depend on the chosen deployment configuration and are confirmed during procurement. Vendors and safeguards are disclosed by function; specific implementations may change without weakening these commitments. Every feature listed is labeled with its status as of the date shown; statuses are reviewed before publication.

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