

How to Add Task Related to the Litigation Case

Objectives

- Insert a task related to the litigation case in the database

Steps

In LEXZUR you can add a new task via the **Actions** button in the Stages & Activities tab or via the **Plus** button in the Tasks section within each stage.

The screenshot displays the LEXZUR interface for a litigation case. The left sidebar contains navigation options: General Info, Stages & Activities (highlighted), Emails, Bills, Attachments, Expenses, Time Entries, Matters, Contracts & Documents, and Settings. The main area shows the 'First Instance Court' stage with a 'Tasks' section. The 'Actions' menu is open, showing options like Change Stage, New Hearing, Add Event, New Task, New Reminder (highlighted), and Export to Excel. The 'Tasks' section shows a task titled '161 - Translation' with fields for Assigned to, Due Date, Priority, Task Status, Attachments, and Task Type.

There are 6 mandatory fields: Title, Task type, assigned to, requested by, priority, and due date.

- Task Title: The title for this task.
- Task Type: A list that can be customized on the fly.
- Assigned to: LEXZUR User who is going to work on the Task. There is an "Assign to Me" quick button that automatically adds the logged-in user to the field.
- Priority: A defined list. Priority serves the color coding on Task Boards
- Due Date: When this task needs to be done.
- Notify me before: Add a reminder related to the task based on the due date and then press save.
- Requested by: the user who requested for this task to be done, by default the logged-in user.
- Add a Description: What is needed to be done on this task.
- Related Matter: The associated matter is selected by default.
- Stage: You can select the stage where you need to add the task for.
- You can add more details or attach documents related to this task.

New Task



Task Title*

Task Type*

[+ Task Type](#)

To-Do 

Assigned to*



[Assign to me](#)

Priority*

 Medium 

Due Date*

2023-03-19 

[Notify me before](#)

Requested by*

James Marven 

Description

☒ Send Notification by email

Save

Save and create another

Cancel

New Task



Description

Normal



B

I

U



Shared With

Everyone

Related Matter / Contract



Matter



Contract/Document

Matter

M0000181: BLP industry x ABC



Stage : First Instance Court



Select



Send Notification by email

Save

Save and create another

Cancel

New Task

Shared With

Everyone

Related Matter / Contract

Matter

Contract/Document

Matter

M0000181: BLP industry x ABC

Stage : First Instance Court

Select

More Details

Related Documents

Send Notification by email

Save

Save and create another

Cancel

Once you add your task it will appear in the Stages & Activities tab by clicking on the tasks in each stage.

App4Legal Dashboards Clients Contacts Matters Contracts & Documents Time Tasks Money iDocs New Universal Search 278 125

M00000181 BLP industry x ABC Matter - Litigation Case Actions

General Info

Stages & Activities

Emails New

Bills

Attachments

Expenses

Time Entries

Matters

Contracts & Documents

Settings

Trust 9,600.00 USD

Paid 1,600.00 USD

Due 0.00 USD

Billable 0.00 USD

First Instance Court

last attended hearing 2023-03-17 11:00:00 By James Marven , Sam Marven

Audit Judges Opponent Lawyers

Court Type: Commercial Court Degree / Circuit: Appeal Court

Court Region: Court:

Client: BLP industry Client Position:

Judgment Date: In this Stage for 8 day(s)

Hearings (1) Tasks (1) Events

Tasks

161 - Translation

Assigned to: Sam Marven Due Date: 2023-03-15 Attachments: 0 Document(s)

Priority: Medium Task Status: 1-Open Task Type: Translation

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For more information about LEXZUR, kindly reach out to us at help@lexzur.com.

Thank you!