

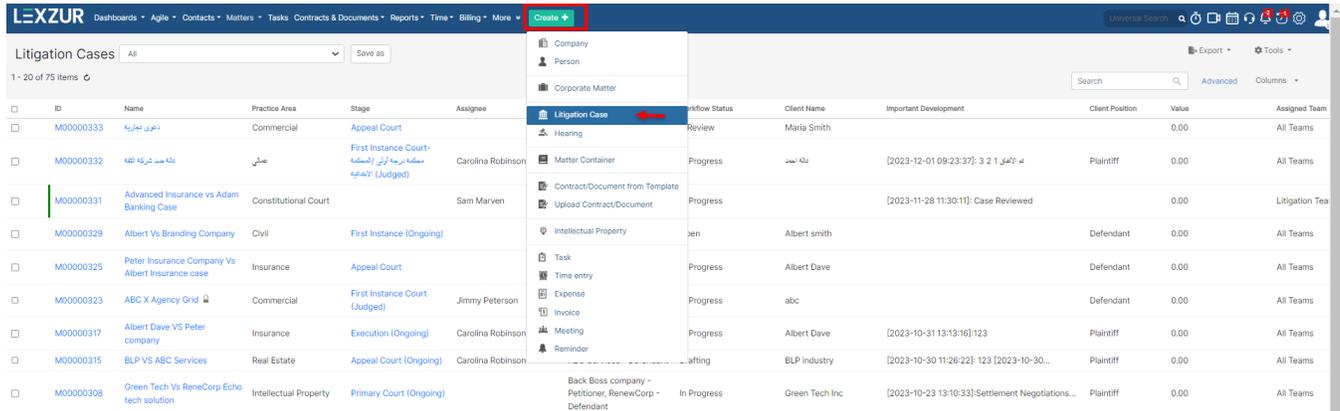
How to Add a New Litigation Case

Objectives

- Insert a Litigation Case in the database

Steps

Litigation Cases can be easily added via the quick Create button in the navigation menu:



You will be asked to fill out some mandatory fields and additional cases details:

The screenshot shows the 'Add Litigation Case' form with the 'General Info' tab selected. The form has a sidebar on the left with options: 'General Info' (selected), 'More Details', 'Opponents', 'Date & Time', 'People', 'More Details', 'Custom Fileds', and 'Matter rate'. The main form area has the following fields:

- Name:** * (required) - BLP Industry X Advanced Manufacturing Civil Case
- Practice Area:** * (required) - Civil
- Arrival Date:** * (required) - 2023-06-15
- Client Name:** * (required) - BLP industry
- Client Position:** * (required) - Plaintiff
- Description:** - Description

First, within the **General Info** tab, specify the name, area of practice, case arrival date, and so on...

- **Name:** Enter a name for the litigation case- this will make it easier to search for later.
- **Practice Area:** A customizable list for defining the related area of practice for this Case. For example, Criminal, Financial, Civil, Labor, Real Estate, and so on.
- **Arrival Date:** When this case reaches your office, by default, it takes the current date.



The 3 fields above are sufficient for creating litigation cases, however, you can add more information for reporting purposes.

Additionally, you can describe the matter and identify the client requesting it, search for existing clients, or add new ones on the fly, indicate the client's position, specify the internal reference number, priority and privacy, and attach any related files if needed.

Under the **More Details** tab, provide some extra details such as opponents' details, dates, related people, custom fields, rates, and so on:

Opponents:

Add as many opponents as needed, search for existing opponents name or add one on the fly and indicate their position.

Date & Time:

Some information includes:

- **Filed on:** the date on which you started working on the Case.
- **Due Date:** Whether a deadline is imposed by the client or from your end.
- **Estimated Effort:** You can add an estimate of how much effort this case will require (This can later be compared with the actual effort from the Time Logs that are recorded on the litigation case)

Add Litigation Case

Cancel send a notification Save & Create New Save

General Info

More Details

- Opponents
- Date & Time
- People
- More Details
- Custom Fileds
- Matter rate

More Details

Opponents

Date & Time

Filed on: ← Hijri Date

Due Date: ← Hijri Date

Closed On: Hijri Date

Estimated Effort: ←

Date

People

People:

Includes related people details such as:

- **Requested by:** the specific contact who requested this litigation case.
- **Assignee:** The specific LEXZUR user who is assigned to this case, will belong to the chosen Assigned Team.
- **Assigned Team:** Select the Team that will be working on this case.

By default, all Users belong to the Team called All Teams. However, you can create multiple teams to reflect your workplace.

Add Litigation Case

Cancel send a notification Save & Create New Save

General Info

More Details

- Opponents
- Date & Time
- People
- More Details
- Custom Fileds
- Matter rate

Date & Time

People

Referred By:

Requested by: ←

Assigned Team: ←

Assignee: ←

Company

Person

And the names of any related company or person as well.

More Details:

- **Stage:** Select the Litigation Stage this Case will start in. This is a customizable list that depicts the Litigation Stages a Case can go through. ex. First Instance, Appeal, Cassation, and so on.
- **Matter Container:** In case you've defined a Matter container you can link this new case to its related container.
- **Value:** A monetary value to this Litigation Case.

Add Litigation Case

- General Info
- More Details**
- Opponents
- Date & Time
- People
- More Details
- Custom Fileds
- Matter rate

Cancel send a notification Save & Create New Save

More Details

- Opponents >
- Date & Time >
- People >
- More Details** v

Stage: + Add Stage

Matter Container:

Value:

- Custom Fileds >
- Matter rate >

Custom Fields:

Fill out the custom fields while adding the case if necessary.

Add Litigation Case

- General Info
- More Details**
- Opponents
- Date & Time
- People
- More Details
- Custom Fileds**
- Matter rate

Cancel send a notification Save & Create New Save

- People >
- More Details >
- Custom Fileds** v

Billing Arrangement

Department

Custom Field 1

Custom Field 3

Custom Field 2

Custom Field 4

Matter Rate:

Add any specific rate for this matter as well.

Add Litigation Case Cancel ✓ send a notification Save & Create New Save

General Info

More Details

Opponents

Date & Time

People

More Details

Custom Fileds

Matter rate

More Details

Opponents >

Date & Time >

People >

More Details >

Custom Fileds >

Matter rate ▾

Entity Name: ←

Rate: ←

+ Add Entity Rate

Now you have added your litigation case, you can go further with additional steps such as adding related tasks, reminders, or attachments.



The Litigation Case has been created successfully.

M00000482

Now you can go further. for more steps

☰
Add Task
>

🔔
Add Reminder
>

📁
Add Documents
>

⏩ Skip

You can now track and manage all your litigation cases from one grid.

LEXZUR Dashboards - Agile - Contacts - **Matters** - Tasks - Contracts & Documents - Reports - Time - Billing - More - **Creates** +

Universal Search 🔍 [Icons]

Litigation Cases All [Dropdown] Save as

1 - 20 of 75 items

ID	Name	Stage	Assignee	Opponents	Workflow Status	Client Name	Important Development	Client Position	Value	Assigned Team
M0000333	مخبري التجارية	Intellectual Properties			1-Review	Marla Smith			0.00	All Teams
M0000332	تلكه صمد شركة الكفة	عقلى		شركة كمال لخدماته	In Progress	تلكه صمد	[2023-12-01 09:23:37]: 3 2 1	Plaintiff	0.00	All Teams
M0000331	Advanced Insurance vs Adam Banking Case	Constitutional Court	Sam Marven		In Progress		[2023-11-28 11:30:11]: Case Reviewed		0.00	Litigation Tea
M0000329	Albert Vs Branding Company	Civil		Branding Company - Plaintiff	Open	Albert smith		Defendant	0.00	All Teams
M0000325	Peter Insurance Company Vs Albert Insurance case	Insurance		Peter Insurance Company - Plaintiff	In Progress	Albert Dave		Defendant	0.00	All Teams
M0000323	ABC X Agency Grid	Commercial	Jimmy Peterson	Agency Grid - Plaintiff	In Progress	abc		Defendant	0.00	All Teams
M0000317	Albert Dave VS Peter company	Insurance	Carolina Robinson	Peter Finance - Defendant	In Progress	Albert Dave	[2023-10-31 13:13:16]:123	Plaintiff	0.00	All Teams
M0000315	BLP VS ABC Services	Real Estate	Carolina Robinson	ABC Services - Defendant	Drafting	BLP Industry	[2023-10-30 11:26:22]: 123 [2023-10-30...	Plaintiff	0.00	All Teams
M0000308	Green Tech Vs ReneCorp Echo tech solution	Intellectual Property		Back Boss company - Petitioner, RenewCorp - Defendant	In Progress	Green Tech Inc	[2023-10-23 13:10:33]:Settlement Negotiations...	Plaintiff	0.00	All Teams



Learn more about how to manage your litigation cases [here](#).

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

Thank you!