

How to Capture & Manage Litigation Case Details

Objective

- Capture & Manage Litigation Case details

Steps

After adding a case, it will be accessible from the grid in the Litigation Cases module.

You can access a case by clicking on its name or ID in the grid.

ID	Name	Practice Area	Stage	Assignee	Opponents	Workflow Status	Client Name	Important Development	Client Position	Value	Assigned Team
M00000333	مصرى العليزيه	Commercial	Appeal Court			1-Review	Maria Smith			0.00	All Teams
M00000331	Advanced Insurance vs Adam Banking Case	Constitutional Court		Sam Marven		In Progress		[2023-11-28 11:30:11]: Case Reviewed		0.00	Litigation Tea
M00000329	Albert Vs Branding Company	Civil	Execution (Ongoing)		Branding Company - Plaintiff	Open	Albert smith		Defendant	0.00	All Teams
M00000325	Peter Insurance Company Vs Albert Insurance case	Insurance	Appeal Court		Peter Insurance Company - Plaintiff	In Progress	Albert Dave		Defendant	0.00	All Teams
M00000323	ABC X Agency Grid	Commercial	First Instance Court (Judged)	Jimmy Peterson	Agency Grid - Plaintiff	In Progress	abc		Defendant	0.00	All Teams
M00000317	Albert Dave VS Peter company	Insurance	Execution (Ongoing)	Carolina Robinson	Peter Finance - Defendant	In Progress	Albert Dave	[2023-10-31 13:13:16]:123	Plaintiff	0.00	All Teams
M00000315	BLP VS ABC Services	Real Estate	Appeal Court (Ongoing)	Carolina Robinson	ABC Services - Defendant	Drafting	BLP industry	[2023-10-30 11:26:22]: 123 [2023-10-30...	Plaintiff	0.00	All Teams
M00000308	Green Tech Vs ReneCorp Echo tech solution	Intellectual Property	Primary Court (Ongoing)		Back Boss company - Petitioner, RenewCorp - Defendant	In Progress	Green Tech Inc	[2023-10-23 13:10:33]:Settlement Negotiations...	Plaintiff	0.00	All Teams
M00000300	Michael VS BLP company	Constitutional Court	Execution (Ongoing)	Sam Marven	BLP industry	In Progress	Michael Cavin	[2023-10-12 11:35:24]: 123		0.00	Litigation Tea
M00000297	NBO X ABC	Commercial	Appeal Court	Sam Marven		In Progress	NBO	[2023-09-25 09:17:55]:here are the updates...		0.00	Litigation Tea

In the panel on the left, there are sub-tabs to capture items related to this Case. Across the top of the page, you'll find the Matter ID and Name, the ability to change the status of the case, enable Email Notifications, Add a note, save, and perform a number of actions related to the Case.

M00000175 Paul Jones Vs Basil Crown Contracting Case
Matter - Litigation Case

Cancelled Closed Done more Save Actions

Trust 0.00 USD Paid 1,050.00 USD Due 0.00 USD Billable 1,050.00 USD Cap 10,000.00 USD

General Info

Name Paul Jones Vs Basil Crown Contracting C Practice Area Construction, Contracting

Workflow Status In Progress Workflow used System Workflow (default)

Internal Ref Number 2023/5698 Matter Container Start typing

Matter Priority Medium Stage None

Success Probability None Value (USD) 0

Judgment Value (USD) 0 Recovered Value(USD) 0

Client Name Paul Jones Client Position Report Requester

Opponent (1) Basil Crown Opponent Position None

+ Add another Opponent

Description

People

Assigned Team All Teams

Assignee Carolina Robinson

Referred By Start typing

Requested By Start typing

Privacy

Shared With Set as Private

Everyone

Date & Times

Arrival Date 2023-03-01

Under this section, you have 5 widgets that reflect in general the financial information about this Case. If there was a Trust Fund balance, the amount paid by the Client, the amount Due to being paid, the Billable amount, and the Capping.

The screenshot displays a litigation case management interface. At the top, the case title is "M00000175 Paul Jones Vs Basil Crown Contracting Case". Below the title, there are buttons for "Cancelled", "Closed", "Done", "more", "Save", and "Actions". A horizontal bar shows financial status: Trust (0.00 USD), Paid (1,050.00 USD), Due (0.00 USD), Billable (1,050.00 USD), and Cap (10,000.00 USD). The main section is titled "General Info" and contains the following fields:

Name	Paul Jones Vs Basil Crown Contracting Cc	Practice Area	Construction, Contracting
Workflow Status	In Progress	Workflow used	System Workflow (default)
Internal Ref Number	2023/5698	Matter Container	Start typing
Matter Priority	Medium	Stage	None
Success Probability	None	Value (USD)	0
Judgment Value (USD)	0	Recovered Value(USD)	0
Client Name	Paul Jones	Client Position	Report Requester
Opponent (1)	Basil Crown	Opponent Position	None

Additional fields include "Description" and "Add another Opponent". On the right side, there are sections for "People" (Assigned Team: All Teams, Assignee: Carolina Robinson), "Privacy" (Shared With: Set as Private), and "Date & Times" (Arrival Date: 2023-03-01).

In the middle of the screen you have multiple sections to capture information related to the Case:

Matter Details: Main Litigation case details entered on the New Litigation Case window

This screenshot is identical to the one above, showing the same litigation case management interface with the same financial status and case details.

- **Important Development:** This is a field you can use to keep track of the latest updates on the Case, with the option to include a timestamp of the development.
- **Custom Fields:** If there's any additional information you wish to capture and we don't have a field for it, you can create a Custom Field, and give it a name and a type.
- **External Advisor:** If you outsource your Litigation Case to external Legal Practitioners you can mention them here, enter the company name and the external advisor's name.

External Advisor

Company *

Start typing

External Advisors *

Start typing

Rate Per Hour

0

Share documents. ?

Save Cancel

- Related Contributors: If there is anyone else working on this Case you can mention them here, select the contact name.
- Notes: Here you can keep a trail of all the noteworthy updates related to this Case.
- History: The Audit Report tab is to keep track of the changes made to the main fields of the Case, who made the changes, and when.

Along the right side of the page, you have sections for the People related to this Case, Privacy options, and the Dates and Times.

M00000175 Paul Jones Vs Basil Crown Contracting Case
Matter - Litigation Case

Cancelled Closed Done more Save Actions

Trust 0.00 USD Paid 1,050.00 USD Due 0.00 USD Billable 1,050.00 USD Cap 10,000.00 USD

General Info

Custom Fields
External Advisor
Related Contributors
Notes
History

Stages & Activities

Emails New

Bills

Attachments

Expenses

Time Entries

Matters

Contracts & Documents

Settings

General Info

Name * Paul Jones Vs Basil Crown Contracting Co Practice Area * Construction, Contracting

Workflow Status In Progress Workflow used System Workflow (default)

Internal Ref Number 2023/5698 Matter Container Start typing

Matter Priority Medium Stage None

Success Probability None Value (USD) 0

Judgment Value (USD) 0 Recovered Value(USD) 0

Client Name Paul Jones Client Position Report Requester

Opponent (1) Basil Crown Opponent Position None

+ Add another Opponent

Description ?

People Zoom Meet Now

Assigned Team All Teams

Assignee Carolina Robinson

Referred By Start typing

Requested By Start typing

Privacy

Shared With Set as Private

Everyone

Date & Times

Arrival Date * 2023-03-01

You have also sections for related Persons and Companies - you can add them from Add New - search for them, and specify their role on this Case. Roles are a customizable list.

📅 Date & Times	
Arrival Date *	2023-03-01 
Filed on	2023-03-01 
Due Date	2023-08-31  Notify me before
Closed On	YYYY-MM-DD 
Estimated Effort	
Effective Effor...	3h 30m

🏢 Related Companies + Add New	
Advanced Solutions	  

👤 Persons + Add New	
Paul Jones	  
Basil Crown	  

Lastly, an Audit section that shows the Case creation and modification date along with the users who performed those actions.

🔍 Audit ▼	
Created On	2023-03-01 17:22
Modified On	2023-03-26 14:15
Created By	Carolina Robinson
Modified By	James Marven

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

Thank you!