

How to Generate Hearing Reports

Objectives

- Generate hearing reports
- Send the report directly to the client

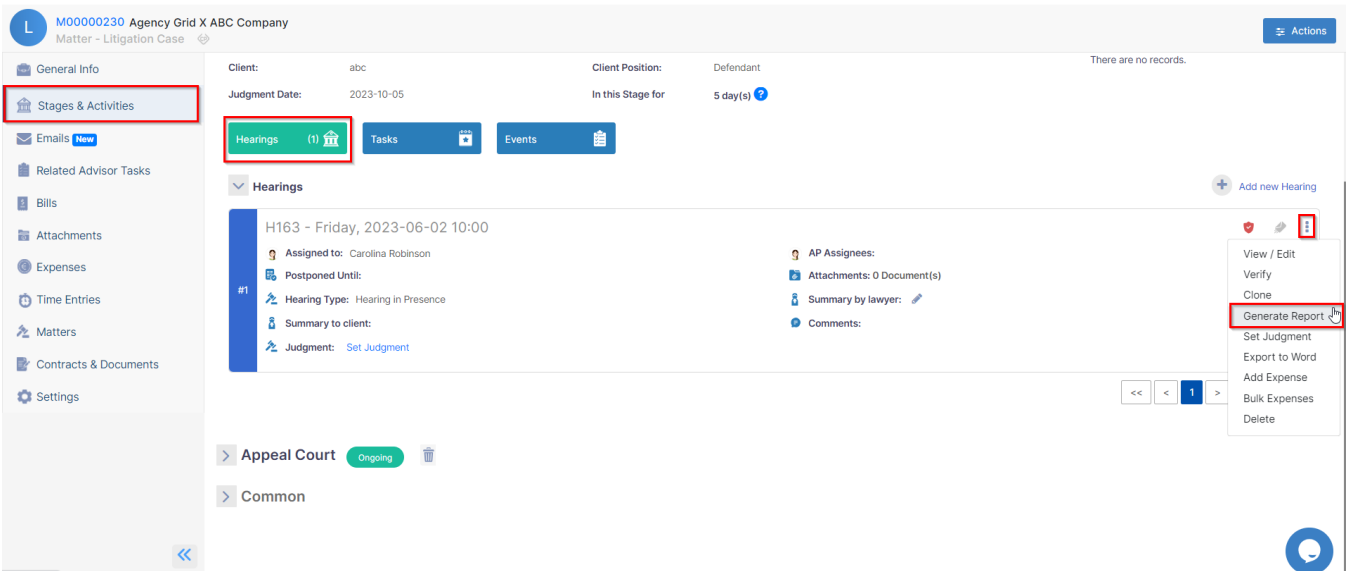
Steps

In LEXZUR, you can create and send a hearing report to your client.

Client reporting enables you to regularly interact with your client and helps you educate your client on what you do.


Open the Litigation Case, then from the **Stages & Activities** tab choose the **Hearing** you wish to send.

From the 3 dots at the level of the hearing, click **Generate Report**



From the Hearing Report Generator, you can choose a template from the list that you have already added.



 The templates can be customized depending on your needs, so you can create your own with the information you need to send and use it while generating reports. [Learn more here.](#)

The system will automatically fetch the hearing's data based on your template. The report is now ready; you can give it a new name, download it, or send it to your client.

site.app4legal.com/7691/cases/events/00000230

LEXZUR Dashboards Agile Contacts Matters Tasks Contracts & Documents Reports Time Billing More Create + Universal Search

M00000230 Agency Grid X ABC Company Matter - Litigation Case Actions

General Info Stages & Activities Emails New Related Advisor Tasks Bills Attachments Expenses Time Entries Invoices Matters Contracts & Documents Settings

Trust 0.00 USD Paid 0.00 USD Due 0.00 USD Billable 10,500.00 USD

Dispute

Last attended hearing 2023-10-26 18:17:00

Court Type: Court Degree / Circuit: Court Region: Court: External/Court Reference Date

Client: ABC Services Client Position: In this Stage for 40 day(s)

Judgment Date: Hearings (2) Tasks Events

Hearings

H213 - Thursday, 2023-10-26 18:17

Assigned to: AP Assignees: Micheal Cav

Postponed Until: Attachments: 1 Document(s)

Hearing Type: Answering note Summary by lawyer: Answering hearing notes

Summary to client: Comments:

Judgment: Travel Ban Set Judgment

H168 - Wednesday, 2023-06-21 10:30

The hearing report could be sent directly to the client by email. Add your client's email address and write your message. The email subject is automatically taken from the system including the client's name, the matter's stage, and the hearing's date and time.

Once you are done, click on send.

Send Report to Client



To *

JonesAAlice21@gmail.com x

CC

Includes users or external emails

Subject *

M00000230 - ABC services - Execution - 2023-06-02 10:00

Message *

Dear Alice,

Find attached the hearing updates....

Attachment *



H163-M00000230-20230608140810.pdf

[View Download](#)

Send

Cancel

Once you click send, a pdf version of the hearing template will be sent to your client.

You can then differentiate the hearings that were sent to the clients and how many times, by clicking on the envelope icon within each hearing.

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M00000230 Agency Grid X ABC Company

Matter - Litigation Case

General Info

Stages & Activities

Emails New

Related Advisor Tasks

Bills

Attachments

Expenses

Time Entries

Matters

Contracts & Documents

Settings

Client: abc

Client Position: Defendant

There are no records.

Judgment Date: 2023-10-05

In this Stage for 5 day(s)

Hearings 1

Tasks

Events

Hearings

H163 - Friday, 2023-06-02 10:00

#1

Assigned to: Carolina Robinson

Postponed Until:

Hearing Type: Hearing in Presence

Summary to client:

Judgment: [Set Judgment](#)

AP Assignees:

Attachments: 0 Document(s)

Summary by lawyer:

Comments:

This Hearing was sent to client 1 time(s).

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

Thank you!