

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.

Litigation Cases											Export	Tools	
1 - 20 of 74 Items											Search	Advanced	Columns
<input type="checkbox"/>	ID	Name	Practice Area	Stage	Assignee	Opponents	Workflow Status	Client Name	Important Development	Client Position	Value	Assigned Team	
<input type="checkbox"/>	M00000333	مخبرتي التأمينية	Commercial	Appeal Court			1-Review	Maria Smith			0.00	All Teams	
<input type="checkbox"/>	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	
<input type="checkbox"/>	M00000329	Albert Vs Branding Company	Civil	Execution (Ongoing)		Branding Company - Plaintiff	Open	Albert smith		Defendant	0.00	All Teams	
<input type="checkbox"/>	M00000325	Peter Insurance Company Vs Albert Insurance case	Insurance	Appeal Court		Peter Insurance Company - Plaintiff	In Progress	Albert Dave		Defendant	0.00	All Teams	
<input type="checkbox"/>	M00000323	ABC X Agency Grid	Commercial	First Instance Court (Judged)	Jimmy Peterson	Agency Grid - Plaintiff	In Progress	abc		Defendant	0.00	All Teams	
<input type="checkbox"/>	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	
<input type="checkbox"/>	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	
<input type="checkbox"/>	M00000308	Green Tech Vs ReneCorp Echo tech solution	Intellectual Property	Primary Court (Ongoing)		Back Boss company - Petitioner, ReneCorp - Defendant	In Progress	Green Tech Inc	[2023-10-23 13:10:33]: Settlement Negotiations...	Plaintiff	0.00	All Teams	
<input type="checkbox"/>	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	
<input type="checkbox"/>	M00000297	NBO v 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

CancelledClosedDonemoreSaveActions

General Info

Custom Fields

External Advisor

Related Contributors

Notes

History

Stages & Activities

EmailsNew

Bills

Attachments

Expenses

Time Entries

Matters

Contracts & Documents

Settings

Trust0.00 USD

Paid1,050.00 USD

Due0.00 USD

Billable1,050.00 USD

Cap10,000.00 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.

Cancel

- 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.

 Settings

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!