How to Automate Tasks and Reminders

Objectives

Automate Tasks and Reminders upon creation of Corporate Matter/ Litigation Case/ Judgment/Contracts

Steps

Task and trigger automation in LEXZUR allows you to streamline and automate tasks and reminders when certain events occur such as creating corporate matters, litigation cases or contracts, or setting judgments.

Navigate to the System Settings and choose "Tasks & Triggers Automation" from System Preferences.

| App4Legal Dashboards - Agile - Contacts - Matters - Tas | sks Contracts & Documents + A.I. + Reports + Time + Billing + More + New + | Universal Search 🔍 Ō 🕩 🔠 🖑 🚱 👩 |
|---|---|---|
| Keniniter Types | Manage non-business days Jusers & Permissions User Groups Manage Users User Groups Permissions | Custom Fields Custom Fields Applicable Laws Attachment Status Attachment Type Document Generator Templates Folder Folder Templates SLA Management |
| Setup & Configuration Notification Scheme Look & Feel Integrations Task & Triggers Automation Document Content Search (Full Text Search) | Imi User Management Reports Users Audit Report Login History Report User Management Report User Management Report Light Import Data Light Import Data | DocuSign Integration Intellectual Property Intellectual Property Rights IP Classes IP Subcategories IP Statuses IP Statuses Petition/Opposition Types |
| Setup | Companies Persons Corporate Matters Intellectual Properties Litigation Cases | Manage Boards Matter Boards |

The admin can add a trigger, edit, or delete existing ones.

Settings / Task & Triggers Automation

Spend less time on repetitive tasks and reminders



Matter Triggers (23)

| Trigger Type | Practice Area | From | То | Trigger | Acti | ons | |
|-------------------------|----------------|----------------------|----------------------|--|------|-----|--|
| Set Judgment | Commercial | Appeal Court | Cassation/High Court | Add Task (To-Do) | Ø | Û | |
| Set Judgment | Criminal | Appeal Court | Cassation/High Court | Add Task (To-Do) | Ø | Û | |
| Set Judgment | Administrative | Appeal Court | Cassation/High Court | Add Task (To-Do) | Ø | Û | |
| Create Corporate Matter | Acquisition | | | Add Task (calling clients) / Add Task (Attach Docs on App4legal) | Ø | Û | |
| Create Corporate Matter | Commercial | | | Add Task (Attach Docs on App4legal) / Add Reminder (Reminder) | C | Û | |
| Set Judgment | Arbitration | Appeal Court | Execution | Add Task (Attach Docs on App4legal) | 6 | Û | |
| Create Corporate Matter | Commercial | | | Add Task (Attach Docs on App4legal) / Add Reminder (License) | Ø | Û | |
| Set Judgment | Civil | First Instance Court | Appeal Court | Add Reminder (Appeal) / Add Task (Attach Docs on App4legal) | Ø | Û | |
| Create Corporate Matter | Legal opinion | | | Add Task (Attach Docs on App4legal) / Add Reminder (License) | Ø | û | |

In order to add a trigger, you must first select the type: set judgment, create corporate matter, create litigation case, or create/upload a new contract /document.

Define the conditions that should trigger the automation, such as the trigger types, practice areas, or other criteria. Then, specify the action you want to be performed, which could include creating a task, or reminders.

For example, The "Set Judgement" trigger type has the following mandatory fields:

- Practice Area: This trigger should be assigned to a practice area
 From Stage: Choose the "From" stage
 To Stage: The "To" stage should be selected

| Frigger Type* | | |
|---|------------------------|--|
| Set Judgment | ~ | |
| | | |
| | | |
| Conditions | | |
| Conditions Practice Area* | | |
| Conditions Practice Area* Constitutional Court | ~ | |
| Conditions Practice Area* Constitutional Court From stage* | ✓ To stage* | |
| Conditions Practice Area* Constitutional Court From stage* Appeal Court | To stage* Execution | |

A task or a reminder can be added from the Add Actions.

After selecting the task, you must select the due in (the number of days), assign the task to the user, and specify the task type and title.

| Actions | Add Reminder | | |
|--------------------------------|--------------|--------------------------|---|
| Due in (days)* | | Task Type* | |
| 10 | | Attach Docs on App4legal | , |
| Assigned to* | | Title* | |
| Matter Assignee Matter Creato | r Other | Attach related documents | |
| Description | | | |
| | | | |
| Attach the related legal files | | | |
| Attach the related legal files | | | |
| Attach the related legal files | | | |
| Attach the related legal files | | | |
| Attach the related legal files | + Add | More Action | |

After selecting the reminder, you must select the due in(the number of days), the user to remind, the reminder type, and the summary.

| Actions | | | | |
|--------------------|----------------|-------|----------------|---|
| Due in (days)* 🛛 🛶 | | | Reminder Type* | |
| 10 | | | | ~ |
| User to Remind* 🔸 | _ | | Summary* | |
| Matter Assignee | Matter Creator | Other | Summary | |
| | | | | |

A trigger can contain as many actions as you need.

Repeat this action based on your business rules within the legal team.

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

Thank you!