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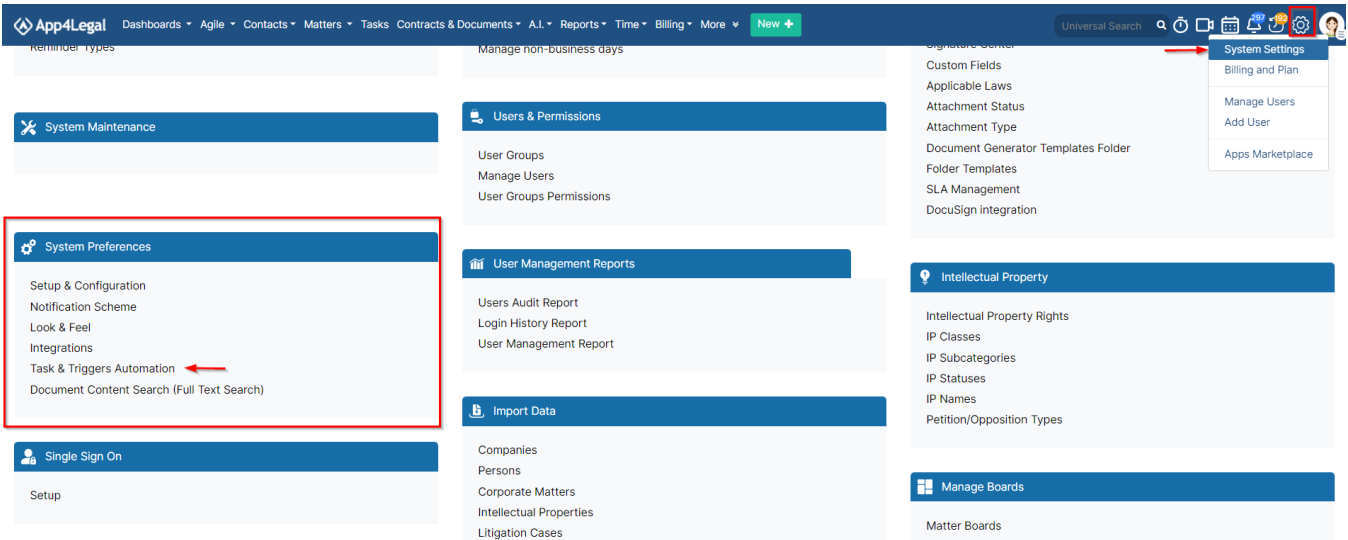
The admin can add a trigger, edit, or delete existing ones.

Matter Triggers (23)

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

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:

1. **Practice Area**: This trigger should be assigned to a practice area
2. **From Stage:** Choose the "From" stage
3. **To Stage:** The "To" stage should be selected

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.

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