

How to assign multiple cases/matters to different teams?

Objectives

- Assign Cases or Matters to different teams

Steps

In LEXZUR, you can assign cases and matters to different teams.

Select the matters you want to assign in the Corporate Matters/ Litigation Cases grid by simply clicking on the checkboxes.

Corporate Matters							
All		Save as		Export		Tools	
1 - 20 of 147 items		Search		Advanced		Columns	
<input type="checkbox"/>	ID	Assignee	Client Name	Name	Practice Area	Workflow Status	Important Development
<input checked="" type="checkbox"/>	M00000342			legal opinion	Legal opinion	Open	
<input checked="" type="checkbox"/>	M00000341	Carolina Robinson	Maria Smith	Legal Advice for Maria	Real Estate	In Progress	[2023-12-05 13:11:41]: matter reviewed
<input type="checkbox"/>	M00000340	Alice Jones	Branding Company	Branding Company Registration	Other	Open	
<input type="checkbox"/>	M00000334	Carolina Robinson	Brand Line Company	Legal Advice on Purchase Agreement for BLC	Acquisition	In Progress	[2023-12-01 16:21:26]: legal research...
<input type="checkbox"/>	M00000330	Carolina Robinson	Adam Skims	Legal Advice for Adam	Commercial	In Progress	[2023-11-27 11:38:18]: Matter in...
<input type="checkbox"/>	M00000328	Jimmy Peterson	Anna Robin	Legal Consultation for Paul Jones	Consultation	Under Review	[2023-11-21 10:40:47]: matter under...
<input type="checkbox"/>	M00000327	Alvah Zarzour (Inactive)	Maria Smith	legal advice	Consultation	Open	

Click on the Tools button Change Assignee.

Corporate Matters							
All		Save as		Export		Tools	
1 - 20 of 147 items		Search		Ad		Manage Filters Archive Unarchive Change Assignee	
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In the change assignee page, you can change the assigned team and assignee user for the selected matters.

Change Assignee

Assigned Team

All Teams

Assignee

Save

Cancel

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

Thank you!