

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.

 Date & Times


Arrival Date *2023-03-01



Filed on2023-03-01




Due Date2023-08-31




Notify me before

Closed OnYYYY-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 On2023-03-01 17:22

Modified On2023-03-26 14:15

Created ByCarolina Robinson

Modified ByJames Marven

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

Thank you!