How to Configure Matter SLA

Objectives

- Enable the "SLA Management" feature for Matters
- Configure SLA for Matters/Cases

Steps

In LEXZUR, you can define a target time duration for different Matter workflow statuses.

To enable this feature, you have to go to System Settings and select Setup & Configuration from System Preferences.

¢	System Preferences
	Setup & Configuration Notification Scheme
	Integrations
	Task & Triggers Automation
	Document Content Search (Full Text Search)
	Custom Integrations

In the System Values tab, you have to set the default value of "Allow feature "SLA Management" " to Yes and click on Save.

Settings / Setup & Configuration				
Active Directory			۹ 🔺	
Adobe Sign Integration	Property	Default Value	Actions	
Advisor Portal	Allow feature "API"	Yes	Save	
Contract/Document Default Values	Aller Andrew 1991 A Management			
Client Portal	Allow reactive SLA Management	Yes	Save	
Default Values	Allow Custom Email	Not Set *	Save	
Delegation	Allow feature "Al"	Disabled and Hide from Menu	Save	
DocuSign Integration		Astheter		
emSigner Integration	Lock Add/update Matter Time Entries	NO v	Save	
External Links		Lock matter workflow status		
Hearing Verification Process		User groups without restriction Select		
Document Content Search	Lock Add/Update Time Entries 📀	Activate: No *	Save	
Maker Checker Control		Days in Past 3		
Menu External Links		User groups without restriction Select		
Notifications			•	٢
Outgoing Mail				
Password Policy				
Reminders				
Sayen Integration				
System Values				
UAE Pass Integration	_			
Web Hooks				
Save All				

To manage the matters SLAs, head to the "Matters" section SLA Management.

Sea Matters
Matter Client Decitions
Matter Success Prohabilities
Matter Company Poloc
Matter Dereen Belee
Matter Centeiner Statuese
Stages
Practice Areas & Due Dates
Assignment Rules
Custom Fields
Matter Value Tiers
Manage Workflows
SLA Management
Event Types
Email Templates

You can add, edit or delete SLAs.

LEXZUR Dashboards - Agile - Contacts	• Matters • Tasks Contracts & Do	ocuments * Reports * Time * Billing * More * Create +	1		Universal Search	Ō D 🛗	0400 🕹
Settings / SLA Management , Add SLA							
Total Records: 8							·
						ŧ.	0 -
Name	Target 😮	Workflow	Start	Pause	Stop	Edit	Delete
Special Projects	3 week(s)	System Worklow (default)	Open	Pending	Cancelled, Closed, Done	Edit	Delete
Administrative	5 week(s)	Administrative workflow	Open		Cancelled, Done	Edit	Delete
Criminal Cases	1 week(s)	Criminal	Under Review , Working on it	Pending	Closed, Rejected	Edit	Delete
Consultations	1 week(s)	Consultation Workflow	Under Review	Pending Internally	Completed, Rejected	Edit	Delete
Legal Review	4 week(s)	Consultation Workflow	Open, Under Review	Pending Internally	Completed, Rejected	Edit	Delete
Consultation Requests	1 week(s)	Consultation Workflow	Open, Under Review	Pending Internally	Completed, Rejected	Edit	Delete
Legal Team Review	3 week(s)	System Workflow (default)	Open	Pending	Cancelled, Closed, Done	Edit	Delete
test	1 day(s)	Financial Cases	In Progress	Pending	Completed	Edit	Delete

Once adding a new SLA, you have some mandatory fields:

- SLA name: specify the SLA name
 Workflow: select the workflow you want to apply to this SLA.
 Target time: specify the target time such as in weeks, days, or hours.
- 4. Practice Area: you can enable this SLA to all practice areas or customized ones.
- 5. Starting Status to start counting the time
- 6. Status when you want to stop counting.

Settings / SLA M	anagement / Add SLA						
Add SLA							
Name*	Name		Target*	Target e.g. (3w, 4d, 12h)	Priority	Choose All	•
Workflow*	Select Workflow	*	Practice Area*	Custom	Client Name Choose All) Custom	
Start*	Choose Workflow Status		Pause	Choose Workflow Status	Stop*	Choose Workflow Status	
	Start the time counter when			Time counter should stop during		Stop the time counter when	
Email Notification fo	r breached SLAs:						
Notify (To)	<u> </u>			Notify (CC)			
JonesAAlice21	@gmail.com ×			Includes users or external emails			
Save Reset							

You can also specify the workflow status for the pause counting time, Specify the matter's priority, and customize this SLA to particular clients if needed.

In the Email Notification for breached SLAs section, you can specify the user that will get notified once the SLA is breached.

To view the SLA elapsed time for a specific Matter, head to the matter/case page, and click "Show SLA elapsed time" from the Actions button on the top right:

M00000219 Consultation for Matter - Corporate Matter	Paul Jones				C	Dpen 🌲 🗙	🖬 Save 🚔 Actions
🔤 General Info	💮 Trust	7,520.00 USD 🐻 Paid	0.00 USD	Due	0.00 USD	📺 Billa	Export to Word Partners Shares
Custom Fields External Advisor Related Contributors	🔤 General Info					😵 People	Show SLA Elapsed Time Convert To Litigation Show Matter in Client Portal
Notes	Name *	Consultation for Paul Jones	Practice Area * 🚹	Consultation	•	Assigned Tea	Archive Delete
History	Workflow Status	Completed	Workflow used	Consultation Workflow	ø	Assignee	Carolina Robinson 💌
Reminders	Internal Ref Number		Matter Container	Start typing	С,	Referred By	Start typing Q
Emails New	Matter Priority	A Medium -	Stage 🕂	None	Ŧ	Requested By	Start typing Q
Related Advisor Tasks	Client Name 🖸	BLP industry	Value (USD)	0		Company Nam	e Q
Bills	Description ?						
Attachments						Privacy	
Expenses					4	Shared With	Set as Private
A Matters	Important Development	0					0
S						🛗 Date & T	imes

This will show you all the cycles done at the level of this particular matter, with all the details, what was the target, the elapsed time, and if **Met** the target or was **Breached**.

LA Elapsed Time				>
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SLA	Target	Elapsed Time	Status	
Consultations (Cycle 1)	1 week(s)	1 week(s) 9 hour(s) 39 min(s)	Stopped - Breached	
Consultations (Cycle 2)	1 week(s)	10 hour(s) 7 min(s)	Stopped - Met	

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Setting SLAs for matters becomes effortlessly accessible right from the matters page. When you click to display the elapsed time, and in cases where no SLAs were previously defined, you can easily initiate the process by clicking to add a new one.



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

Thank you!