

How to Outsource Matters/Cases to External Advisor

Objectives

- Share corporate matters or litigation cases with external advisors.
- Communicate with the advisors on Matters/Cases.

Steps

To do so, open the corporate matter or the litigation case you wish to share with your advisors, click on the “**External Advisors**” option under the General Info tab, and click to add the Advisor.

The screenshot shows the 'External Advisor' interface for a matter titled 'M00000319 legal advice for Advanced Industries'. The left sidebar contains a 'General Info' section with a red arrow pointing to the 'External Advisor' link. The main content area has tabs for 'Add', 'Save', and 'Cancel'. Below this is a table for 'Related Contributors' with columns for Person Name, Role, Comments, Added By, and Added On. A row shows 'Alice Robin' added by 'Carolina Robinson' on '2023-11-03 16:19:49'. There is also a 'Notes' section with a table for 'All threads' and a 'Notes' tab. A message from 'Carolina Robinson' is visible, stating 'Carolina Robinson added a note on 2023-11-03 16:19:19 URL's (0) 0 Document(s) @Alice Robin please review'. A blue chat bubble icon is in the bottom right corner.

Once you specify the company name, the system will show you all the related contacts in the External Advisor field and will let you know who are the licensed advisors.



The licensed advisors are the ones who were added by the admin and given an advisor portal license, so they will receive notifications and have access to the advisor portal.

The screenshot shows the 'External Advisor' form. It has a 'Company' field with 'BLP industry' entered, a red arrow pointing to it, and a search icon. Below is an 'External Advisors' field with a red arrow pointing to it, containing 'Stephan Luiz (Licensed) (omran.hariri@app4legal.com)'. There is a 'Rate Per Hour' field with '200' entered. At the bottom are 'Save' and 'Cancel' buttons.

You can select the advisors to which you want to outsource this matter, and you also have the option to share the documents of this matter with the advisors and specify their **Rate Per Hour**.

Both, you and the Advisor will receive an email notification for the assigned matter.

Matter Assignment - App4Legal

Translate message to: Arabic | Never translate from: English

A

App4Legal <noreply@app4legal.com>

To: Omran Hariri

Cc: Caroline Mrawed

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Mon 12/11/2023 6:02 PM

LEXZUR

Dear Stephan Luiz,

You have been assigned to the matter [M319](#) by Jimmy Peterson.

Note: this is an automatic email generated by App4Legal. Please, do not reply.

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Litigation Cases could be outsourced in the same way as corporate matters.

The advisor will access then his matters/cases from the advisor portal, he can start collaborating, add his own tasks, change litigation stages, and add hearings, and time logs.

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Upon enabling the share documents option, all documents related to a matter will automatically appear in the Advisor Portal. However, users can also manage which files they want to hide from the Advisor Portal from the matter's attachments page.

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M00000319 legal advice for Advanced Industries

Matter - Corporate Matter

General Info

Tasks

Reminders

Emails New

Related Advisor Tasks

Bills

Attachments

Expenses

Time Entries

Invoices

Matters

Contracts & Documents

Settings

Trust

19,500.01 USD

Paid

500.00 USD

Due

500.00 USD

Billable

0.00 USD

Archived Hard Copies

App4Legal Documents

Google Drive

OneDrive

Dropbox

URL's

Download

Rename

Open in

Move

Copy Link

Share with

List versions

Hide from Advisor Portal

Convert to PDF

1 Selected

Delete

M319

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	Name	Type	Status	Keywords	File Size	Added On	Added By	Modified By
📁	Email Attachments				-	2023-11-03 16:39...	Carolina Robinson	Carolina Robins
📁	Legal Files				-	2023-11-03 16:13...	Carolina Robinson	Carolina Robins
📁	Task Attachments				-	2023-11-03 16:24...	Carolina Robinson	Carolina Robins
📄	Purchase Agreement.docx		1-Draft		38.8 kB	2023-11-03 16:...	Carolina Robins...	Carolina Robins
📄	Sales Agreement template.docx		1-Draft		16.4 kB	2023-11-03 16:49...	Alice Jones	Carolina Robins

Moreover, the advisor can easily communicate with the legal team by simply adding notes.

LEXZUR

Add
Corporate Matters
Litigation Cases
Hearings
Tasks
My Time Logs
Manage Timers
Bills
English
My Profile
Logout

Client Name:Advanced IndustriesTotal Spent Hrs:0

MATTER DETAILS
Name:legal advice for Advanced IndustriesValue:0.00
Outsourced To:Stephan Luiz
Description:
Important Development:[2023-11-03 16:18:54]: finalizing 123
Status Comments:
CUSTOM FIELDS
NOTES
CAROLINA ROBINSON ADDED A NOTE ON 2023-11-03 16:19
@Alice Robin please review
ADD NOTE

Similarly, the legal team, will view all the advisor's notes from the matter's or case's page, and respond or communicate with them in the same way.

M00000319 legal advice for Advanced Industries
Matter - Corporate Matter
1-Review 2-In Progress 3-Closed More
Save Actions

General Info
Custom Fields
External Advisor
Related Contributors
Notes
History
Tasks
Reminders
Emails
Related Advisor Tasks
Bills
Attachments
Expenses
Time Entries
Invoices
Matters
Contracts & Documents
Settings

Add Save Cancel

Person Name	Role	Comments	Added By	Added On
Alice Robin			Carolina Robinson	2023-11-03 16:19:49

Notes

All threads Notes Emails

Add Note
All Threads
Expand All / Collapse All

Carolina Robinson added a note on 2023-11-03 16:19 URL's (0) 0 Document(s)
@Alice Robin please review

Total Records: 1

History

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

Thank you!