How to Assign Tasks in Corporate Matters

Objectives

- Assign a task to team members in a corporate matter

Steps

The Tasks tab within a matter is a great way to manage all the tasks associated with a given matter. This tab allows you to easily view details such as task type, workflow status, effort, and so on. Furthermore, you can easily add new tasks to the matter with just a few clicks.

Tasks can be added through the **Actions** button in the top right corner of the tasks page -> **Add New Task**

You can also use the **Create** button in the navigation menu to quickly add new tasks.

Adding a new task requires 6 mandatory fields:

New Task

Task Title*

Translation to Arabic

Task Type*   + Task Type

Translation

Assigned to*

Jad Herbert

Assign to me

Priority*

☆ Medium

Due Date*

2023-01-20   📅

Hijri Date

Notify me before

Requested by*

Elise Khulman

- **Task Title:** Give the task a title, or small description.
- **Task Type:** A list of types that can be customized on the fly, including Research, Meeting the Clients, Attach Docs, and so on.
- **Assigned to:** The task can be assigned to any LEXZUR user, or you can simply assign it to yourself from the "Assign to me" quick button.
- **Priority:** Specify the task's priority such as low, medium, high, or critical. Priority serves the color coding on Task Boards
- **Due Date:** The deadline or the specific date by which the task is expected to be completed.
- **Notify me before:** This allows you to receive a notification or reminder before the task deadline.
- **Requested by:** The user who initiated this task request, with the default being the currently logged-in user.

New Task

Description

| Normal ⬍ | B | *I* | U | 🔗 |

Shared With   Everyone

📄 Related Matter / Contract   ⌄

⦿ **Matter**   ○ **Contract/Document**

Matter

| M0000222: Legal opinion on Agreements related to Albert Insurance | ⌄ |

🖇 More Details   ›

⬆ Related Documents   ›

☑ Send Notification by email

| Save | Save and create another | Cancel |

Additionally, describe what needs to be done for this task.

The associated matter is automatically selected by default. You can include additional details such as estimated effort, contributors, locations, and any related documents if necessary.

Once you add your task, it will be displayed in the Tasks grid.

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

Thank you!