

How to Manage Litigation Cases

Objectives

- Insert a Litigation case in the database
- Correct/Revise/Update data related to an existing Case
- Capture and manage a Litigation Case's details

Steps

In LEXZUR, you can efficiently manage Litigation Cases at every stage in a smart and agile central software workspace, where users can collaborate with internal and external stakeholders, keep track of legal deadlines and automate reminders sent as emails or notifications.

First, you have to add Litigation Cases to your database. You do that through the quick Create button in the navigation menu.

LEXZUR

Dashboards

Agile

Contacts

Matters

Tasks

Contracts & Documents

Reports

Time

Billing

More

Create +

Universal Search

63

13

Litigation Cases

All

Save as

1 - 20 of 73 items

	ID	Name	Practice Area	Stage	Assignee
<input type="checkbox"/>	M00000331	Advanced Insurance vs Adam Banking Case	Constitutional Court		Sam Marvinen
<input type="checkbox"/>	M00000329	Albert Vs Branding Company	Civil	First Instance (Ongoing)	
<input type="checkbox"/>	M00000325	Peter Insurance Company Vs Albert Insurance case	Insurance	Appeal Court	
<input type="checkbox"/>	M00000323	ABC X Agency Grid	Commercial	First Instance Court (Judged)	Jimmy Peterson
<input type="checkbox"/>	M00000317	Albert Dave VS Peter company	Insurance	Execution (Ongoing)	Carolina Robinson
<input type="checkbox"/>	M00000315	BLP VS ABC Services	Real Estate	Appeal Court (Ongoing)	Carolina Robinson
<input type="checkbox"/>	M00000308	Green Tech Vs ReneCorp Echo tech solution	Intellectual Property	Primary Court (Ongoing)	
<input type="checkbox"/>	M00000300	Micheal VS BLP company	Constitutional Court	Execution (Ongoing)	Sam Marvinen
<input type="checkbox"/>	M00000297	NBO x ABC	Commercial	Appeal Court	Sam Marvinen
<input type="checkbox"/>	M00000292	Administrative Consultation for Adam	Administrative		

Company

Person

Corporate Matter

Litigation Case

Hearing

Matter Container

Contract/Document from Template

Upload Contract/Document

Intellectual Property

Task

Time entry

Expense

Invoice

Meeting

Reminder

Export

Tools

Advanced

Columns

Workflow Status

Client Name

Progress

Open

Albert smith

Progress

Albert Dave

Progress

abc

Progress

Albert Dave

Drafting

BLP industry

Progress

Green Tech Inc

Progress

Micheal Cavin

In Progress

NBO

Open

There are some fields that need to be filled out such as the:

- Name
- Practice Area
- Arrival Date
- client name and position
- Opponent name and position

in addition to some information such as due date, assignee user, matter rate, or custom fields.

Add Litigation Case

General Info

More Details

Opponents

Date & Time

People

More Details

Custom Fileds

Matter rate

Cancel

✓ send a notification

Save & Create New

Save

General Info

Name:*

BLP Industry X Advanced Manufacturing Civil Case

Practice Area:*

Civil

+ Practice Area

Arrival Date:*

2023-06-15

Hijri Date

Client Name:

Company

BLP Industry

X

Client Position:

Plaintiff

+ Client Position

Description:

Description

You can now track and manage all your litigation cases from one grid. From the **Matters** tab, choose **Litigation Cases**.

LEXZUR

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Agile
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Create +

Universal Search

83

13

Litigation Cases

All

1 - 20 of 73 items

Export

Tools

ID	Name	Stage	Assignee	Opponents	Workflow Status	Client Name
M00000331	Advanced Insurance vs A Banking Case		Sam Marven		In Progress	
M00000329	Albert Vs Branding Company	Civil	First Instance (Ongoing)	Branding Company - Plaintiff	Open	Albert smith
M00000325	Peter Insurance Company Vs Albert Insurance case	Insurance	Appeal Court	Peter Insurance Company - Plaintiff	In Progress	Albert Dave
M00000323	ABC X Agency Grid	Commercial	First Instance Court (Judged)	Agency Grid - Plaintiff	In Progress	abc
M00000317	Albert Dave VS Peter company	Insurance	Execution (Ongoing)	Peter Finance - Defendant	In Progress	Albert Dave
M00000315	BLP VS ABC Services	Real Estate	Appeal Court (Ongoing)	ABC Services - Defendant	Drafting	BLP industry
M00000308	Green Tech Vs ReneCorp Echo tech solution	Intellectual Property	Primary Court (Ongoing)	Back Boss company - Petitioner, RenewCorp - Defendant	In Progress	Green Tech Inc
M00000300	Micheal VS BLP company	Constitutional Court	Execution (Ongoing)	BLP industry	In Progress	Micheal Cavin
M00000297	NBO x ABC	Commercial	Appeal Court		In Progress	NBO
M00000292	Administrative Consultation for Adam	Administrative			Open	

Start by using the **advanced** filters that will help you search for a specific Litigation Case based on the criteria of your selection.

For example, you can search for cases by practice area, assignee, Client name, and so on.

Litigation Search Filters

Matter ID

contains

Practice Area

Equal

Civil

Assignee

contains

Start typing

Workflow Status

Equal

Select

Name

contains

Assigned Team

Equal

Select

Internal Ref Number

contains

Status Comments

contains

More Filters Criteria

Reset

Submit

[Hide]

Litigation Cases

All

Save as

Export

Tools

1 - 3 of 3 items

Search

Advanced

Columns

<input type="checkbox"/>	ID	Name	Practice Area	Stage	Assignee	Opponents	Workflow Status	Client Name	Important Development
<input type="checkbox"/>	M00000223	Josephine VS ABC Services	Civil	Execution	Carolina Robinson	ABC Services	In Progress	Josefine Josefine	[2023-05-18 12:42:37]: 1
<input type="checkbox"/>	M00000211	ABC services x Bernadette	Civil	Appeal Court	Alice Jones	Bernadette Batz - Plaintiff	In Progress	ABC Services	
<input type="checkbox"/>	M00000124	Back Boss Company x Alvah	Civil	First Instance Court	Maysa Hakim	Alvah Scott - Co-Defendant	Open	Back Boss company	

Also, you can save these filters for later use, and export the results to a spreadsheet for reporting.

Save Filter

Filter Name*

Civil Cases

☐ Filter is visible to all users

Save

Close

Litigation Cases

Civil Cases

Save as

Export

Tools

1 - 3 of 3 items

Search

Advanced

Columns

<input type="checkbox"/>	ID	Name	Practice Area	Workflow Status	Important Development	Stage	Assignee	Opponents
<input type="checkbox"/>	M00000223	Josephine VS ABC Services	Civil	In Progress	[2023-05-18 12:42:37]: 123	Execution	Carolina Robinson	ABC Services
<input type="checkbox"/>	M00000211	ABC services x Bernadette	Civil	In Progress		Appeal Court	Alice Jones	Bernadette Batz - Plaintiff
<input type="checkbox"/>	M00000124	Back Boss Company x Alvah	Civil	Open		First Instance Court	Maysa Hakim	Alvah Scott - Co-Defendant

Now, to go further with additional modifications, click on the Matter's name or ID to open its page.

Litigation Cases All Save as Export Tools								
1 - 20 of 73 items Search Advanced Columns								
<input type="checkbox"/>	ID	Name	Practice Area	Stage	Assignee	Opponents	Workflow Status	Client Name
<input type="checkbox"/>	M00000331	Advanced Insurance vs Adam Banking Case	Constitutional Court		Sam Marven		In Progress	
<input type="checkbox"/>	M00000329	Albert Vs Branding Company	Civil	First Instance (Ongoing)		Branding Company - Plaintiff	Open	Albert smith
<input type="checkbox"/>	M00000325	Peter Insurance Company Vs Albert Insurance case	Insurance	Appeal Court		Peter Insurance Company - Plaintiff	In Progress	Albert Dave
<input type="checkbox"/>	M00000323	ABC X Agency Grid	Commercial	First Instance Court (Judged)	Jimmy Peterson	Agency Grid - Plaintiff	In Progress	abc
<input type="checkbox"/>	M00000317	Albert Dave VS Peter company	Insurance	Execution (Ongoing)	Carolina Robinson	Peter Finance - Defendant	In Progress	Albert Dave
<input type="checkbox"/>	M00000315	BLP VS ABC Services	Real Estate	Appeal Court (Ongoing)	Carolina Robinson	ABC Services - Defendant	Drafting	BLP industry
<input type="checkbox"/>	M00000308	Green Tech Vs ReneCorp Echo tech solution	Intellectual Property	Primary Court (Ongoing)		Back Boss company - Petitioner, RenewCorp - Defendant	In Progress	Green Tech Inc

The General Info Tab allows you to add details or modify existing information, update workflow statuses, and record important developments or updates.

For efficient collaboration, you can outsource this case to external Legal Practitioners, and mention the contributors working on the matter if any.

M00000226 BLC Vs. Albert Insurance Company- Banking Case

Matter - Litigation Case

1-Review

2-In Progress

3-Closed

More

Save

Actions

Trust 0.00 USD

Paid 0.00 USD

Due 0.00 USD

Billable 1,050.00 USD

General Info

Stages & Activities

Emails New

Bills

Attachments

Expenses

Time Entries

Invoices

Matters

Contracts & Documents

Settings

General Info

Name

BLC Vs. Albert Insurance Company- Banking Case

Practice Area

Banking

Workflow Status

In Progress

Workflow used

Legal Team Review

Internal Ref Number

1564/2023

Matter Container

Start typing

Matter Priority

High

Stage

Execution

Success Probability

None

Value (USD)

0

Judgment Value (USD)

0

Recovered Value (USD)

0

Client Name

Back-Line Company

Client Position

None

Opponent (1)

Albert Insurance Company

Opponent Position

None

Description

Important Development

[2023-05-10 11:14:34]: Settlement Reached

[2023-05-22 11:15:37]: First judgment scheduled

People

Assigned Team

All Teams

Assignee

Alice Jones

Referred By

Start typing

Requested By

Start typing

Approved by:

Billing Preferences

Billing Method

Hourly Rate

Privacy

Shared With

Set as Private

Everyone

Date & Times

Arrival Date

2023-05-01

In addition, take note of all the noteworthy updates related to this case. You can also log emails with attachments as matter notes using Outlook or Gmail Connect.

On the stages and activities tab, you can add and track litigation stages, hearings, events, tasks, and reminders.

Change stages by filling out some information such as the stage name, status, Judgement date, and court-related details. You can then add and track all the associated hearings, tasks, and events with the current stage, along with all their details.

You can always update hearing details, set judgements, generate hearing reports, and much more.

Assign tasks and set reminders to your team when several people are working in parallel on the same stream. You can then track all the associated tasks and reminders with the current matter, along with all their details.

M00000226 BLC Vs. Albert Insurance Company- Banking Case
Matter - Litigation Case

General Info

Stages & Activities

Execution Ongoing

First Instance Court Judged

last attended hearing 2023-06-13 10:00:00 By Alice Jones

Court Type: Financial **Court Degree / Circuit:** First degree

Court Region: **Court:**

Client: Back-Line Company **Client Position:** Defendant

Judgment Date: 2023-05-31 **In this Stage for** 22 day(s)

Hearings (1) **Tasks** **Events**

Hearings

H167 - Tuesday, 2023-06-13 10:00

Assigned to: Alice Jones

Postponed Until:

Hearing Type: Case List

Summary to client:

AP Assignees:

Attachments: 0 Document(s)

Summary by lawyer:

Comments:

Actions

- Change Stage
- New Hearing
- Add Event
- New Task
- New Reminder
- Export to Excel

External/Court Reference **Date**

There are no records.

Furthermore, you can now send emails from the case itself and track all the related email conversations as well.

And keep track of all the matter-related bills as well.

M00000226 BLC Vs. Albert Insurance Company- Banking Case
Matter - Litigation Case

General Info

Stages & Activities

Emails New

Bills

Attachments

Expenses

Time Entries

Invoices

Matters

Contracts & Documents

Settings

Compose

Search All Conversations

Undeliverable: Matte... Jun 15, 2023

Microsoft Outlook
<MicrosoftExchange329e71ec88ae4615bbc36ab6ce41109e@app4legal.0.onmicrosoft.com>
To: Back-Line Company <help@BLC.com>

Matter Updates Jun 15, 2023

Caroline AI Mrawd <caroline.morad@app4legal.com>
To: Back-Line Company <help@BLC.co...>

Matter Updates

Caroline AI Mrawd <caroline.morad@app4legal.com>
To: Back-Line Company <help@BLC.co...>

Dear BLC team,

kindly find attached the agreements to be reviewed

Agreements.... 22.1 KB

Case update... 18.0 KB

The Attachments Tab lets you organize folder structures and upload and manage documents related to this case.

M00000226 BLC Vs. Albert Insurance Company- Banking Case
Matter - Litigation Case

General Info

Stages & Activities

Emails New

Bills

Attachments

Expenses

Time Entries

Invoices

Matters

Contracts & Documents

Settings

Trust 0.00 USD

Paid 0.00 USD

Due 0.00 USD

Billable 0.00 USD

Archived Hard Copies

App4Legal Documents Google Drive SharePoint OneDrive Dropbox URL's

+ New **Upload**

Search M226

M226

Name	Type	Status	Keywords	File Size	Added On	Added By	Modified By	Modified on
Agreements.docx		3-Approved		22.1 kB	2023-05-22 11:35:02	Carolina Robinson	Carolina Robinson	2023-05-22 11:38...
Case updates.docx		1-Draft		18.0 kB	2023-05-22 11:24:29	Carolina Robinson	Carolina Robinson	2023-05-22 11:34...
Legal Request.docx	Documents	3-Approved		11.7 kB	2023-05-22 11:17:05	Carolina Robinson	Carolina Robinson	2023-05-22 11:37...
BLC Legal Files				-			Carolina Robinson	2023-06-15 16:19...

In addition, record expenses and time logs, so you can determine what to invoice later.

