

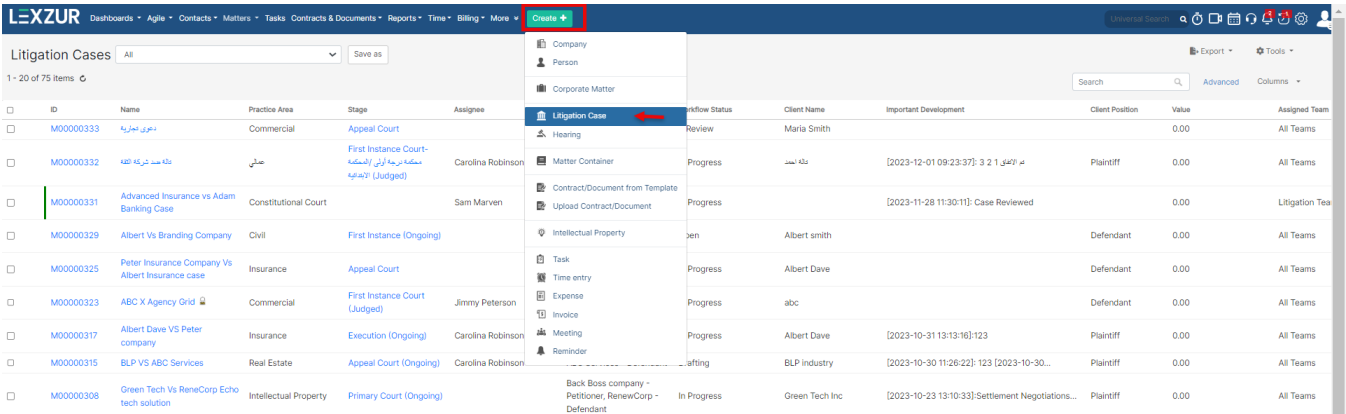
How to Add a New Litigation Case

Objectives

- Insert a Litigation Case in the database

Steps

Litigation Cases can be easily added via the quick Create button in the navigation menu:



You will be asked to fill out some mandatory fields and additional cases details:

The screenshot shows the 'Add Litigation Case' form. The 'General Info' tab is selected and highlighted with a red box. The form has a sidebar with 'More Details' and 'More Info' sections. The 'General Info' section contains the following fields: 'Name' (with a red arrow pointing to the input field), 'Practice Area' (with a red arrow pointing to the dropdown menu), 'Arrival Date' (with a red arrow pointing to the date input field), 'Client Name' (with a red arrow pointing to the dropdown menu), 'Client Position' (with a red arrow pointing to the dropdown menu), and 'Description' (with a red arrow pointing to the text area). The 'Name' field contains 'BLP Industry X Advanced Manufacturing Civil Case'. The 'Practice Area' dropdown is set to 'Civil'. The 'Arrival Date' is set to '2023-06-15'. The 'Client Name' dropdown is set to 'Company' and the 'Client Position' dropdown is set to 'Plaintiff'. The 'Description' field is empty. At the top of the form, there are buttons for 'Cancel', 'send a notification', 'Save & Create New', and 'Save'. At the bottom right, there is a blue circular button with a speech bubble icon.

First, within the **General Info** tab, specify the name, area of practice, case arrival date, and so on...

- **Name:** Enter a name for the litigation case- this will make it easier to search for later.
- **Practice Area:** A customizable list for defining the related area of practice for this Case. For example, Criminal, Financial, Civil, Labor, Real Estate, and so on.
- **Arrival Date:** When this case reaches your office, by default, it takes the current date.



The 3 fields above are sufficient for creating litigation cases, however, you can add more information for reporting purposes.

Additionally, you can describe the matter and identify the client requesting it, search for existing clients, or add new ones on the fly, indicate the client's position, specify the internal reference number, priority and privacy, and attach any related files if needed.

Add Litigation Case

Cancel

✓ send a notification

Save & Create New

Save

General Info

More Details

Opponents

Date & Time

People

More Details

Custom Fileds

Matter rate

Description:

Description

Internal Ref Number:

Internal Ref Number

Matter Priority:

Medium

Shared With

Default User(s)

Drop files here to upload or [Browse](#)

Under the **More Details** tab, provide some extra details such as opponents' details, dates, related people, custom fields, rates, and so on:

Opponents:

Add as many opponents as needed, search for existing opponents name or add one on the fly and indicate their position.

Add Litigation Case

Cancel

✓ send a notification

Save & Create New

Save

General Info

More Details

Opponents

Date & Time

People

More Details

Custom Fileds

Matter rate

More Details

Opponents

Opponent Name:

Company

Advanced Manufacturing

Opponent Position:

Defendant

+ Add additional opponent

Date & Time

People

More Details

Custom Fileds

Matter rate

Date & Time:

Some information includes:

- **Filed on:** the date on which you started working on the Case.
- **Due Date:** Whether a deadline is imposed by the client or from your end.
- **Estimated Effort:** You can add an estimate of how much effort this case will require (This can later be compared with the actual effort from the Time Logs that are recorded on the litigation case)

Add Litigation Case

Cancel

✓ send a notification

Save & Create New

Save

General Info

More Details

Opponents

Date & Time

People

More Details

Custom Fileds

Matter rate

More Details

Opponents

Date & Time

People

Filed on:

Due Date:

Closed On:

Estimated Effort:

Date

People:

Includes related people details such as:

- **Requested by:** the specific contact who requested this litigation case.
- **Assignee:** The specific LEXZUR user who is assigned to this case, will belong to the chosen Assigned Team.
- **Assigned Team:** Select the Team that will be working on this case.



By default, all Users belong to the Team called All Teams. However, you can create multiple teams to reflect your workplace.

Add Litigation Case

Cancel

✓ send a notification

Save & Create New

Save

General Info

More Details

Opponents

Date & Time

People

More Details

Custom Fileds

Matter rate

Date & Time

People

Referred By:

Requested by:

Assigned Team:

Assignee:

Company

Person

And the names of any related company or person as well.

More Details:

- **Stage:** Select the Litigation Stage this Case will start in. This is a customizable list that depicts the Litigation Stages a Case can go through. ex. First Instance, Appeal, Cassation, and so on.
- **Matter Container:** In case you've defined a Matter container you can link this new case to its related container.
- **Value:** A monetary value to this Litigation Case.

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

More Details

Opponents >

Date & Time >

People >

More Details v

Stage:  [+ Add Stage](#)
select an option v

Matter Container: 
Start typing

Value: 
0

Custom Fileds >

Matter rate >

Custom Fields:

Fill out the custom fields while adding the case if necessary.

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

People >

More Details >

Custom Fileds v

Billing Arrangement


Department
select an option v

Custom Field 1


Custom Field 3


Custom Field 2


Custom Field 4


Matter Rate:

Add any specific rate for this matter as well.

Add Litigation Case

Cancel

✓ send a notification

Save & Create New

Save

General Info

More Details

Opponents

Date & Time

People

More Details

Custom Fileds

Matter rate

More Details

Opponents

Date & Time

People

More Details

Custom Fileds

Matter rate

Entity Name:

select an option

Rate:

Rate

+ Add Entity Rate

Now you have added your litigation case, you can go further with additional steps such as adding related tasks, reminders, or attachments.

The Litigation Case has been created successfully.

M00000482

Now you can go further. for more steps

☰

Add Task

>

🔔

Add Reminder

>

📁

Add Documents

>

⏭ Skip

You can now track and manage all your litigation cases from one grid.

Lexus

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 Universal Search

Litigation Cases

1 - 20 of 75 items

Corporate Matters

Litigation Cases

Hearings

Matter Containers

Intellectual Properties

[Save as](#)

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ID	Name	Matter Containers	Stage	Assignee	Opponents	Workflow Status	Client Name	Important Development	Client Position	Value	Assigned Team
M00000333	دعوى التعزير		Appeal Court			1-Review	Maria Smith			0.00	All Teams
M00000332	تلكه ضد شركة اكس	محلي	First Instance Court- محكمة الدرجة الأولى (المحكمة الابتدائية) (Judged)	Carolina Robinson	شركة التأمين الصناعية	In Progress	تلكه المدعى	[2023-12-01 09:23:37]: 3 2 انقضى ا	Plaintiff	0.00	All Teams
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
M00000329	Albert Vs Branding Company	Civil	First Instance (Ongoing)		Branding Company - Plaintiff	Open	Albert smith		Defendant	0.00	All Teams
M00000325	Peter Insurance Company Vs Albert Insurance case	Insurance	Appeal Court		Peter Insurance Company - Plaintiff	In Progress	Albert Dave		Defendant	0.00	All Teams
M00000323	ABC X Agency Grid	Commercial	First Instance Court (Judged)	Jimmy Peterson	Agency Grid - Plaintiff	In Progress	abc		Defendant	0.00	All Teams
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
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
M00000308	Green Tech Vs ReneCorp Echo tech solution	Intellectual Property	Primary Court (Ongoing)		Back Boss company - Petitioner, RenewCorp - Defendant	In Progress	Green Tech Inc	[2023-10-23 13:10:33]: Settlement Negotiations...	Plaintiff	0.00	All Teams

Learn more about how to manage your litigation cases [here](#).

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

Thank you!