How to Enable Out of Office Feature

Objectives

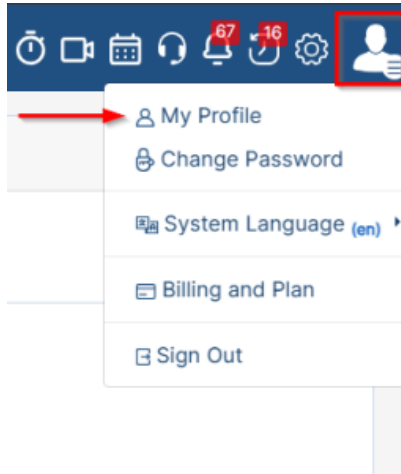- Auto-assign Contracts, Matters, and Cases when a user is out of the office

Steps

In Lexzur, you can Auto-assign Contracts, Matters, and Cases when a user is out of the office. This feature solely works as a re-assignment upon the creation of new records.

⚠️ No migration will be done to the alternative user for existing records. If you want to migrate, then you should use the Delegation feature.

Go to your profile from the avatar on the top right of the screen.

From the "Out of Office" tab, you can set the "Out of Office" feature to yes, and select the alternative assignee and the End Date as well.

When enabled, the system prevents other users from assigning work to the absent user and informs you to assign it to the alternative user.

New Corporate Matter

Client Name	Company / Group ▼
	🔍
	Start typing to select from possible matches.
Assigned Team	All Teams ▼
Assignee	Carolina Robinson ▼
Shared With	Everyone Set as Private
	Start typing to select from possible matches.
Filed on ❓	2023-05-11 📅
Due Date	YYYY-MM-DD 📅
Internal Ref Number	
	This is the internal reference number that is used by your firm.
Matter Priority	☆ Medium ▼
	More Fields

☑ Send Notification by email   **Save**   Cancel

⚠ Warning

The assignee you have selected is out of office until 2023-05-12. Alice Jones will be assigned to this request

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

Thank you!