## How to Link a Person/ Matter/ Contract to a Company

## **Objectives**

• Link a person, matter, or contract related to the company.

## Steps

The **Persons** tab is used to keep track of Persons related to a Company. For example, the CEO, the Lawyer of the Company, or other employees. Persons related to the Company are present with their information in the Persons module within the Contacts which will be covered next.

To relate the person, you can simply write the person name and then press on Add Relation Button.

LEXZUR Dashboards - Agile - Contacts - Matters - Tasks Contracts & Documents - Reports - Time - Billing - More + Create +									
A COM0000091 ABC Service Partner - Star-up	s		2 Actions						
💄 General Info	Relate to Person Person Name Q, Add Relation		Export to Excel						
Entity Management	O Saarch Darson Save Cance								
Shareholders	Name v Job Title v Description	Email	e ~ Category ~ Actions ~						
Board Members									
Httachments									
🚳 Assets									
🌲 Reminders									
≡ Tree View									
Bank Accounts									
₽ Related Companies		•							
🛲 Persons 🛛 🗲									
≯ Matters									
Contracts & Documents									
🖌 Signature Authority									
Company Branches									

From the Actions button, you can export to excel the company-related persons.

Matters tab is auto-populated based on the Matters in the application. Whether a client, opponent, or relation of a different category as long as the Company has been linked to the matter it will appear here.

To relate the matter, you can simply write the matter name and then press on Add Relation button.

LEXZUR Dashboards -	Aglie - Contacts - I	Matters * Tasks Contracts & Documents *	Reports * Time * B	Silling * More ¥ Cre	ate 🕈						d Search 🤷 🖱 🕞 🛗 🤅	२२०० 🕹
A COM00000091 ABC Service Partner - Star-up	BS											≇ Actions
L General Info	Relate to Matter	Matter Name Q. Add Re	lation									
Entity Management												
Shareholders	Q, Search Matt	ter										
Board Members	Matter ID	<ul> <li>Matter Name</li> </ul>	Workflow Sta	~ Туре	<ul> <li>Assigned Team</li> </ul>	<ul> <li>Assignee</li> </ul>	<ul> <li>Practice Area</li> </ul>	<ul> <li>Matter Container ID</li> </ul>	<ul> <li>Priority</li> </ul>	<ul> <li>Filed on</li> </ul>	<ul> <li>Due Date</li> </ul>	~ Actions ~
Attochmonto	M00000315	BLP VS ABC Services	Drafting	Litigation Case	All Teams	Carolina Robinson	Real Estate		high			٠
Attachments	M00000283	BLP industry x ABC services	3-Closed	Litigation Case	All Teams	Alice Jones	Commercial		medium			۵
log Assets	M00000276	Administrative Consultation for Albert	Under Review	Corporate Matter	Corporate Team	Alice Jones	Consultation		medium		2023-08-02	۵
Reminders	M00000271	Administrative Matter	Open	Corporate Matter	All Teams	Alvah Zarzour (Inactive)	Administrative		medium			۰
Tree View	M00000254	BLP industry x ABC Services LLP	1-Review	Litigation Case	All Teams	Alice Jones	Commercial		medium			•
	M00000235	Legal Opinion for ABC	In Progress	Corporate Matter	All Teams	Carolina Robinson	Legal opinion		medium	2023-06-02		•
Bank Accounts	M00000230	Agency Grid X ABC Company	In Progress	Litigation Case	All Teams	Carolina Robinson	Arbitration		medium	2023-05-24		•
P Related Companies	M00000224	Legal opinion for Service Agreement fo	. Pending	Corporate Matter	All Teams	Micheal Cavino	Legal opinion		medium	2023-05-19	2023-06-15	۰
E Persons	M00000223	Josephine VS ABC Services	In Progress	Litigation Case	All Teams	Carolina Robinson	Civil		medium	2023-05-18		۵
	M00000211	ABC services x Bernadette	In Progress	Litigation Case	All Teams	Alice Jones	Civil		medium	2023-05-10		۰
natters												
Contracts & Documents												
🖌 Signature Authority												
Company Branches												

You can also export to excel the company-related matters from the Actions button.

Contracts & Documents tab is filled automatically as long as the company has been linked to a contract.

To relate a contract, you can simply write the contract name and then press Add Relation button.

L=XZUR Dashbarder + Agile + Contacts + Matters + Tasks Contracts & Documents - Reports + Time + Billing + More + Contact + Agile + Contact + Contact + Agile + Contact +											
COM00000091 ABC Services											
<ul> <li>General Info</li> <li>Entity Management</li> </ul>	Relate Contract/Document										
Shareholders	Q, Search Contract/Document										
曾 Board Members	ID ~	Name ~	Туре	Value	~ Assignee	~ Date	Start date	<ul> <li>End date</li> </ul>	~ Actions ~		
Attachmante	CT373	Employment Agreement-Maria	General employment contract	100,000.00	Alice Jones	2023-10-05	2023-11-01	2023-10-19			
Autocimiento	CT366	Insurance contract Between SEHA and.	. Insurance	2,000.00	Carolina Robinson	2023-09-13	2023-09-13	2024-09-13			
ab Assets	CT354	Purchase Agreement Office Supply	Purchase Agreement	0.00	Sam Marven	2023-08-31	2023-08-08	2024-08-08			
🌲 Reminders	CT314	Purchase Agreement-SSC software	Purchase Agreement	0.00	Carolina Robinson	2023-07-06		2023-10-26			
	CT278	[Amendment 202305] Partnership agr	Partnership Agreement	100,000.00	Micheal Cavino	2023-05-17	2023-06-22	2024-07-31			
Bank Accounts	CT277	Partnership agreement-Agency Grid	Partnership Agreement	0.00	Micheal Cavino	2023-05-17	2023-06-22	2024-06-22			
P Related Companies	CT275	Employment Contract between ABC s	General employment contract	0.00	Alice Jones	2023-05-23	2023-05-23	2024-05-23			
m Demons	CT268	Commercial Lease Agreement 256	Commercial Lease Agreement	0.00		2023-05-18					
Jam Persons	CT263	Employment Agreement between ABC	General employment contract	200.00	Carolina Robinson	2023-05-05	2023-05-05	2024-05-05			
A Matters	CT262	Non Disclosure Agreement for ABC	Non-disclosure Agreement	0.00		2023-05-05					
🖹 Contracts & Documents 🔶											
🖋 Signature Authority											
Company Branches											

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

Thank you!