

How to Manage Company Groups

Objectives:

- Add company groups.
- Manage company groups.

Steps:

In Lexzur, you can create company groups. This will enable you to sort companies into different groups inside the system.

To do so, go to **Contacts Companies**. This will show you all the companies added to your database.

LEXZUR

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67

15

Companies

All Companies

Persons

Companies

Clients

Filter

Search Filters

Search

Name	ID	Category	Nickname	Sub-category	Legal Type	Reference #	Nationality	Lawyer	Capital
abc	COM00000071	Client	abc						15,750,0
ABC Services	COM00000091	Partner	ABC Services	Star-up					null
Advanced Industries	COM00000038	Client	Adl	Industrial	Limited Liability Company (...)		United States		100,000
Advanced Solutions	COM00000012	Client	AdS	Documenter	Partnership Limited with S...	RN-457897	United States		200,000
Agency Grid	COM00000102	Opponent	AG						0
Al Kamal Industries	COM00000073	Opponent	K Industries						0
al waha	COM00000107	Opponent	al waha						100,000
Albert Company	COM00000125	Client	Albert Company						0
Albert Insurance Company	COM00000101	Client	Albert IC						0
Alvah Agency	COM00000054	Client	A Agency				United States		0
Astra Digital Holding	COM00000078	Internal	Astra Digital						10,000
Back Boss company	COM00000068	Client	BBC						0

Columns

Click on **action wheel** at the top right of the page **Company Groups**

Companies

All Companies

Save Filter

Search Filters

Search

Name	ID	Category	Nickname	Sub-category	Legal Type	Reference #	Nationality	Lawyer	Capital
abc	COM00000071	Client	abc						15,750,0
ABC Services	COM00000091	Partner	ABC Services	Star-up					null
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al waha	COM00000107	Opponent	al waha						100,00
Albert Company	COM00000125	Client	Albert Company						0
Albert Insurance Company	COM00000101	Client	Albert IC						0
Alvah Agency	COM00000054	Client	A Agency				United States		0

Manage Filters

Import Companies

Company Groups

This will redirect you to the company groups page, where the created groups will be visible.

To create a new company group, click on **Actions New Group**

Company Groups

Search

Actions

New Group

Group ID

Group Name

COM00000114	Agent Group
COM00000013	Beirut Banks
COM00000027	Beirut Construction Group
COM00000039	US Banks
COM00000035	US Industries

All you have to do now is to specify the name of the new group and save it.

Add Company Group

Name *

Save

Cancel

After the group is created, you can now start adding the companies.

All you have to do is click on the Group ID to be redirected to its page.

Company Groups

Search

Group ID

Group Name

COM00000114

Agent Group

COM00000013

Beirut Banks

COM00000027

Beirut Construction Group

COM00000039

US Banks

COM00000035

US Industries

All you have to do now is to relate the company and click on **Add Relation**.

Company GroupsCOM00000039

US Banks

Relate Company

DIG international limited

Add Relation

Name	Nickname	Category	Sub-category	Legal Type	Nationality	Actions
Bank of California	BoC	Supplier	Banking	Partnership Limited with Shares (CPC)	United States	
Paul Finance	Paul Finance	Third Party	Accounting	Limited Liability Company (LLC)	United States	

You can't link the same company to more than one group.

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

Thank you!