

How to Manage Companies in Lexzur

Objectives

- Add a new company
- Correct/Revise/Update data related to an existing company
- Capture and manage a company's details

Steps

In LEXZUR, you can easily and efficiently manage your companies. First, you have to add companies to your database. You do that quickly from the **Create** button in the main menu or from the companies grid by clicking on the **+** sign on the top right side of the screen.

The screenshot displays the Lexzur interface. At the top, there is a navigation bar with various menu items and a 'Create +' button highlighted with a red box. Below the navigation bar, the 'Companies' section is visible, featuring a search bar and a 'Save Filter' button. A dropdown menu is open, showing options for creating a new entity: 'Company', 'Person', 'Corporate Matter', 'Litigation Case', 'Hearing', 'Matter Container', 'Contract/Document from Template', 'Upload Contract/Document', 'Intellectual Property', 'Task', 'Time entry', 'Expense', 'Invoice', 'Meeting', and 'Reminder'. The 'Company' option is highlighted with a red arrow. The main grid shows a list of companies with columns for ID, Name, Nickname, Category, Sub-category, Capital, Capital Currency, and Registration Nb. A red box highlights the '+' icon in the top right corner of the grid.

ID	Name	Nickname	Category	Sub-category	Capital	Capital Currency	Registration Nb
COM00000071	abc	abc	Client				
COM00000091	ABC Services	... ABC Services	Partner	Star-up			
COM00000038	Advanced Industries	... AdI	Client	Industrial			
COM00000012	Advanced Solutions	AdS	Client	Documenter			
COM00000102	Agency Grid	AG	Opponent				
COM00000073	Al Kamal Industries	K industries	Opponent				
COM00000107	al waha	al waha	Opponent				
COM00000125	Albert Company	Albert Company	Client				
COM00000101	Albert Insurance Company	Albert IC	Client				
COM00000054	Alvah Agency	A Agency	Client				
COM00000078	Astra Digital Holding	Astra Digital	Internal				
COM00000068	Back Boss company	BBC	Client				
COM00000037	Back-Line Company	BLcompany	Client	Civil	United States		

There are 3 required fields:

Name: Full legal name of the company

Nickname: That's easier to catch

Category: The relationship between this Company and the Law Firm/Legal Department. A standard list of values is available, including Client, Opponent, Partner, and so on.

New Company ×

Name*

Nickname*

Category*

Choose Person / Company Category ▾

Website

Email

Use semicolons separator (;) to add multiple emails: for ex.
john@gmail.com;john@live.com

 Address >

 Company Details >

 Document >

Shared With  (Public) [Set as Private](#)

Other fields are optional; however, you can fill out these fields to make it easier to generate reports at a later stage. Optional fields include Sub-Category, Company legal type, Company group, Address, and company contact information, etc.

Now you have added your companies, and you can now manage all the related information. You can start by using advanced filters to help you search for companies based on your chosen criteria. You have the option to create your filter and save it for later use. For example, you can search for companies that are located in the United States.

Companies All Companies Save Filter

Filter Search Columns

Status

Equal

Active

Company ID

Company Name

Nickname

Category

Sub-category

Company Legal Type

Company Group

Foreign Name

Nationality

Capital

Capital Currency

Share Par Value

Registration Nb

Registration Tax Nb

Registration Date

Company Lawyer

Registration Authority

Email

Run Save Filter

Name	Nickname	Category	Sub-category	Legal Type	Nationality	Lawyer
Agency Grid	AGC	Internal	Internal Client	Limited Liability Company (...)	Mauritius	Carolyn
Agent LLC	Agent	Client	External Client	Limited Liability Company (...)	American Samoa	Bernard
Al Futtaim Technologies	Al Futtaim Tec	Supplier				
Al Ghurair	Al Ghurair	Client				
Al Manara	Al Manara	Client				
App4Legal	App4Legal	Internal				
Back Line Company	BLC	Client	External Client	Limited Liability Company (...)	United States	Alvah A
BackBoss Company	BBC	Client	Internal Client	Limited Liability Company (...)	United States	Alvah A
Backlone Company	BLO	Client	Consultant	Foreign	Aland Islands	Alvah A
Bandia	Bandia	Supplier	External Client	Government Entity	Afghanistan	Arnold C
Bandia Group	Bandia Group	Client	External finance/accountin...	Join Stock Companies	Angola	Alvah A
Bcompany	Bcompany	Supplier	External Client	Limited Liability Company (...)	United States	Bessy V
Boss name	BN	Client	Internal Client	Limited Liability Company (...)	United States	Aniyah'
Boss Company	Boss	Client	Other	Limited Liability Company (...)	United Arab Emirates	Aniyah'
Bouba Company	Beyerskloof	Client	External Client	Private Company (Pty) Ltd	South Africa	Richard
Brancy	Brancy	External Advisor	External Law Firm	Foreign	Andorra	Andorra

1 - 20 of 114 items Items per page

For further modifications, click on the Company name or Company ID to open its page. You can manage General Information such as adding or updating the company's basic information, company address, and notes. You can also manage information related to shareholders, including (Capital, Shares, Reports) and Board members' information, Documents, Assets, Bank Accounts, and related companies.

COM00000086 Agency Grid
Internal - Internal Client

Save

General Info

Address

Notes

Entity Management

Shareholders

Board Members

Attachments

Assets

Reminders

Tree View

Bank Accounts

Related Companies

Company Information

Name* Agency Grid Nickname* AGC

Category* Internal Sub-category Internal Client

Company Legal T... Limited Liability Company (LL... Company Gro... ADC

Reference # RN12345 Nationality Mauritius

Activity Foreign Name ?

Address

Copy Address From

Privacy

Shared With Set as Private

Everyone

Custom Fields

Client sta... 2021-01-14

Category ... Third Party x

Counterp... Choose

Departme... Choose

Verified b... Choose

Moreover, you can manage the entity through the information related to the company registration details, registration by law, licenses & waivers, commercial registration, auditors, and company lawyers.

COM00000086 Agency Grid

Save

- General Info
- Entity Management**
 - Registration
 - Registration By Law
 - Licenses & Waivers
 - Commercial Registration
 - Auditors
 - Company Lawyer
- Shareholders
- Board Members
- Attachments
- Assets
- Reminders

Registration

Registration Nb	234563156	Registration Date	YYYY-MM-DD Hijri
Registration City	Registration City	Registration Tax Nb	21654652
Company Duration	Company Duration		

Registration By Law

Attestation Authority	Start typing	Registration Authority	Start typing
Ref	Ref	Date	YYYY-MM-DD Hijri

You can also create and manage the Folder structure and Upload Documents through the Attachments Tab.

COM00000038 Advanced Industries
Client - Industrial

- General Info
- Entity Management
- Shareholders
- Board Members
- Attachments**
- Assets
- Reminders
- Tree View
- Bank Accounts
- Related Companies
- Persons
- Matters
- Contracts & Documents
- Signature Authority

App4Legal Documents Google Drive OneDrive Dropbox URL's

+ New Upload

Search COM38

COM38

Name	Type	Status	Keywords	File Size	Added On	Added By	Modified By
Agreement				-	2021-12-08 22:09:57	Carolina Robinson	Carolina Rot
Assets				-	2021-12-08 22:14:36	Carolina Robinson	Carolina Rot
Legal Docs				-	2021-12-08 22:09:47	Carolina Robinson	Carolina Rot
Sales-Agreement.docx	Agreement	1-Draft		9.6 kB	2023-08-28 10:20:53	Carolina Robinson	Carolina Rot

Furthermore, a user can record a company's assets, set reminders, view the ownership percentages through the tree view tab, and set bank accounts related to this company.

Last but not least, you can link a company to existing companies, persons, matters, or contracts in Lexzur, you can keep track of who has the authority to sign on behalf of the Company for official documents, and customize the company view page as needed.

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

Thank you!