

# How to Manage Persons in Lexzur

## Objectives

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

## Steps

In LEXZUR you can easily manage your Persons. First, you have to add Persons to your database. You do that through the quick **Create** button located in the main menu, or from the **person** grid (within the **Contacts** in the main menu) by clicking on the plus button on the top right side of the screen.

LEXZUR

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Create

Universal Search

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Persons

All Persons

Save Filter

SEARCH FILTERS

Person #

Name

Category

Email

Phone

Mobile

PER00000096

Abbas Al Murtada

Client

PER00000072

Abbas Abbas

Client

PER00000089

Abbas Bantz

Internal

hussein.jardal@app-4legal...

PER00000077

Adam David

Client

Adam.david@backline.com

+1 568897854

+1 2

PER00000040

Adam Skims

Client

AdamSkims@outlook.com

+27 458 002 5699

+27

PER00000018

Adam Christopher

Client

adamchristopher@gmail.c...

PER00000076

Adnan Hamza

Client

PER00000026

Adnan Zarzour

Client

soheil.zarzour@gmail.com

PER00000045

Albert Dave

Client

PER00000067

Albert smith

Supplier

albertsm052@gmail.com

PER00000005

Alberto Scott

Partner

PER00000005

Aleen Peterson

Internal

carolinenmaweed@gmail.c...

PER00000055

Alice Jones

Internal

JonesAAlice27@gmail.com

Company

Person

Corporate Matter

Litigation Case

Hearing

Matter Container

Contract/Document from Template

Upload Contract/Document

Intellectual Property

Task

Time entry

Expense

Invoice

Meeting

Reminder

Company

Reference #

Sub-category

Additional ID Type

Additional ID Value

Commercial Dep...

Engineer

Back-Line Comp...

SA Constructions

RN-57749

Engineer

National ID

12569

IT Department

Global Tech

Supplier

lawyer

Columns

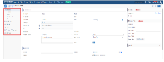
There are 3 required fields:

- **First Name**
- **Last Name**
- **Category**

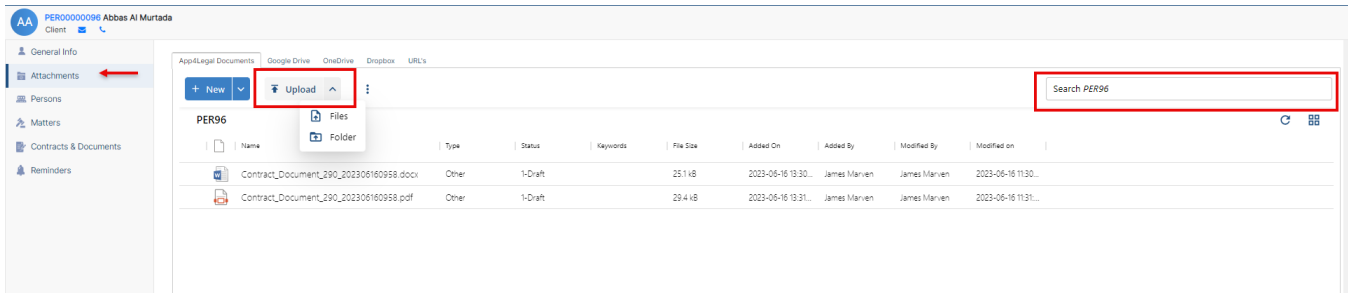
The Category field is used to define the relationship between the person and the law firm or legal department. A standard list of values is offered including Client, Opponent, Partner, and so on.



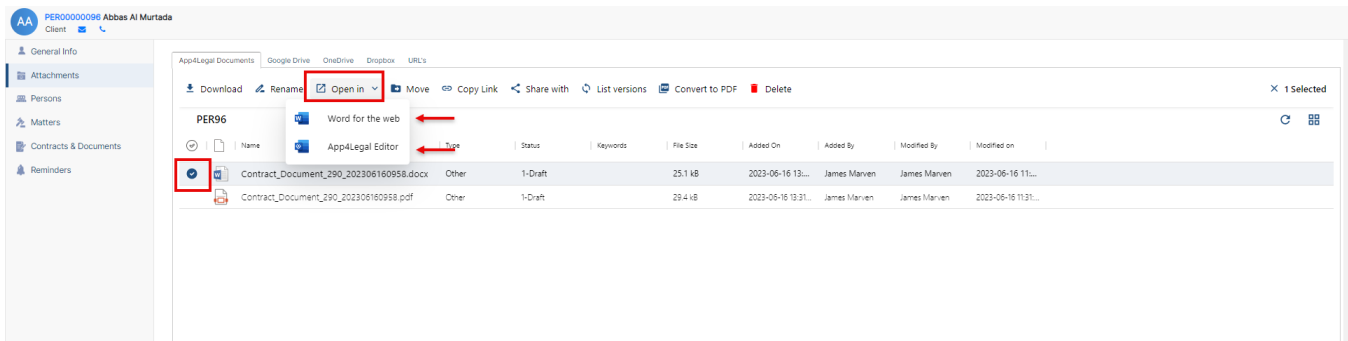
You can click on the Person's name or ID, to open their page and edit or capture more information.  
You can capture general information, change the privacy settings for this specific person, add related documents, customize fields and much more.



You can also create and manage the Folder structure, Upload and download files/folders through the **Attachments** Tab.



The LEXZUR 360 docs will help you manage your documents the same way as you are using Microsoft web. Document Editor is an efficient tool to help you manage different document versions related to a specific contact.



You can even manage reminders related to a specific person through the **Reminders** Tab.

Finally, you can link a person to an existing Person, Matter or a contract in LEXZUR. For example, you can export-related matters to this person using the export button in the **Matters** Tab.

For more information about LEXZUR, kindly reach out to us at [help@lexzur.com](mailto:help@lexzur.com).

Thank you!