

How to Manage Corporate Matters

Objectives

- Insert a Corporate Matter in the database
- Correct/Revise/Update data related to an existing Matter
- Capture and manage a Corporate Matter's details

Steps

In LEXZUR you can efficiently manage Corporate Matters at every stage in a smart and agile central software workspace, where users can collaborate with internal and external stakeholders, keep track of legal deadlines and automate reminders sent as emails or notifications.

First, you have to add Corporate Matters to your database. You do that through the **Create** button in the navigation menu.

The screenshot displays the LEXZUR software interface. At the top, a navigation bar includes the LEXZUR logo, a menu with options like 'Dashboards', 'Agile', 'Contacts', 'Matters', 'Tasks', 'Contracts & Documents', 'Reports', 'Time', 'Billing', and 'More', and a 'Create +' button highlighted with a red box. A 'Universal Search' bar is also present. Below the navigation bar, the 'Corporate Matters' section is visible, featuring a dropdown menu set to 'All' and a 'Save as' button. A table lists 144 items, with the first few rows showing columns for ID, Assignee, Client Name, Name, and Practice Area. A dropdown menu is open from the 'Create +' button, listing various options such as 'Company', 'Person', 'Corporate Matter' (highlighted with a red arrow), 'Litigation Case', 'Hearing', 'Matter Container', 'Contract/Document from Template', 'Upload Contract/Document', 'Intellectual Property', 'Task', 'Time entry', 'Expense', 'Invoice', 'Meeting', and 'Reminder'. The table content includes rows with IDs like M00000330, M00000328, M00000327, M00000326, M00000324, M00000322, M00000319, M00000313, M00000312, M00000311, M00000310, and M00000306, with corresponding assignees, client names, matter names, and practice areas.

There are some fields that need to be filled out, such as the:

- **Matter Name**
- **Practice Area**
- **Arrival Date**
- **Client Name**

In addition to some information such as due date, assignee user, matter rate, or custom fields.

Add Corporate Matter

- General Info
- More Details
 - Date & Time
 - People
 - More Details
 - Custom Fileds
 - Matter rate

General Info

Name: ←

Practice Area: ← + Practice Area

Arrival Date: ← Hijri Date

Client Name: ←

Description:

Description

Internal Ref Number: **Matter Priority:**

You can now track and manage all your corporate matters from one grid. From the **Matters** tab choose **Corporate Matters**.

LEXZUR

 Dashboards ▾ Agile ▾ Contacts ▾ **Matters ▾** Tasks Contracts & Documents ▾ Reports ▾ Time ▾ Billing ▾ More ▾ Create +

Corporate Matters

1 - 20 of 144 items

All

← Corporate Matters
 Litigation Cases
 Hearings
 Matter Containers

ID	Assignee		Name	Practice Area	Workflow Status	Important Development
M00000330	Carolina Robinson	Intellectual Properties	Legal Advice for Adam	Commercial	In Progress	[2023-11-27 11:38:18]: Matter in...
M00000328	Jimmy Peterson	Anna Robin	Legal Consultation for Paul Jones	Consultation	Under Review	[2023-11-21 10:40:47]: matter under...
M00000327	Alvah Zarcour (Inactive)	Maria Smith	legal advice	Consultation	Open	
M00000326	Carolina Robinson	Albert Company	Legal Advice for Albert	Real Estate	In Progress	[2023-11-09 11:02:05]: Matter reviewed and we...
M00000324	Carolina Robinson	Alice Jones	Legal Advice on Purchase Agreement	Agreement	In Progress	[2023-11-07 13:07:06]: we met with the client 123
M00000322	Carolina Robinson	Maria Smith	test	Civil	Open	
M00000319	Carolina Robinson	Advanced Industries	legal advice for Advanced Industries	Agreement	In Progress	[2023-11-03 16:18:54]: finalizing 123
M00000313	Carolina Robinson	BLPC	Legal Advice on Purchase Agreement	Agreement	3-Closed	
M00000312	Carolina Robinson	Annabela Ray	Legal Advice on purchase agreement	Commercial	In Progress	
M00000311	Aleen Peterson	Maria Smith	Trademark	Intellectual Property	Open	
M00000310	Carolina Robinson	Maria Smith	Patent-software	Intellectual Property	Open	
M00000306	Jimmy Peterson	STB	legal opinion for STB	Civil	In Progress	[2023-10-23 14:34:18]: attached documents, 123

Start by using the advanced filters that will help you search for a specific Corporate Matter based on the criteria of your selection.

For example, you can search for Corporate Matters by practice area, Assignee, Client name, and so on.

Corporate Matter Search Filters

Matter ID contains

Practice Area Equal **Legal Opinion**

Assignee contains Start typing

Workflow Status Equal

Name contains

Assigned Team Equal

Internal Ref Number contains

Status Comments contains

More Filters Criteria [Hide]

Corporate Matters Export Tools

1 - 49 of 49 Items Columns

ID	Name	Practice Area	Internal Ref Number	Workflow Status	Due Date	Priority	Requested by	Client Name
M00000172	Document Review on Property Mortgage	Consultation	201/2021	4-In Progress	2021-02-04	high	Zachy Buckley	BackBos

Corporate Matters Export Tools

1 - 15 of 15 Items Columns

ID	Practice Area	Assignee	Name	Arrival Date	Client Name	Workflow Status	Requested by	Important Develop
M00000238	Legal opinion	James Marven	Legal Opinion for changing partner	2023-06-12	Mohamed Mustafa	In Progress		[2023-06-12 13:2
M00000235	Legal opinion	Carolina Robinson	Legal Opinion for ABC	2023-06-02	ABC Services	In Progress	Alvah Zarzour	
M00000224	Legal opinion	Micheal Cavino	Legal opinion for Service Agreement for ABC services	2023-05-19	ABC Services	Pending		
M00000222	Legal opinion	Carolina Robinson	Legal opinion on Agreements related to Albert Insurance Company	2023-05-17	Albert Insurance Company	In Progress		
M00000209	Legal opinion	Sam Marven	Legal opinion for Service Agreement for ABC services	2023-05-09	ABC Services	Open	Elise Khoury	
M00000205	Legal opinion	Micheal Cavino	Legal opinion for ABC services	2023-05-05	ABC Services	Open		
M00000188	Legal opinion	Sam Marven	Legal opinion for Service Agreement for BLP	2023-03-28	BLP Industry	Done		

Also, you can save these filters for later use, and export the results to a spreadsheet for reporting.

Corporate Matters

1 - 15 of 15 Items Columns

ID	Practice Area	Assignee	Name
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Save Filter X

Filter Name* ←

Filter is visible to all users

Now, to go further with additional modifications, click on the Matter's name or ID to open its page.

The General Info Tab allows you to add details or modify existing information, update workflow statuses, and record any important developments or updates.

The screenshot displays the 'General Info' tab for a matter. At the top, there are status buttons: '1-Review', '2-In Progress', '3-Closed', and 'More'. Below this, there are financial summary cards for 'Trust' (8,520.00 USD), 'Paid' (2,100.00 USD), 'Due' (0.00 USD), and 'Billable' (5,750.00 USD). The 'General Info' section includes fields for Name, Practice Area, Agreement, Workflow Status (In Progress), Workflow used, Internal Ref Number, Matter Container, Matter Priority, Stage, Client Name, and Value (USD). A description field contains text about a legal opinion. An 'Important Development' section lists two entries with timestamps and descriptions. On the right, a 'People' sidebar shows assigned team members and a 'Billing Preferences' section.

For efficient collaboration, you can outsource this matter to external Legal Practitioners, and mention the contributors working on the matter if any.

This screenshot shows the 'External Advisor' and 'Related Contributors' sections. The 'External Advisor' section has a table with columns for Company, External Advisors, and Rate per hour. One entry is shown: 'Common Law' with 'Micheal Cav' and a rate of '200.00'. The 'Related Contributors' section has a table with columns for Person Name, Role, Comments, Added By, and Added On. One entry is shown: 'Alice Jones' with role 'Alice Jones', added by 'Carolina Robinson', and added on '2023-06-16 09:27:27'. Below this is a 'Notes' section with tabs for 'All threads', 'Notes', and 'Emails', and an 'Add Note' button.

In addition, take note of all the noteworthy updates related to this matter. You can also log emails with attachments as matter notes using Outlook or Gmail Connect.

Assign tasks and set reminders to your team when several people are working in parallel on the same matter. You can then track all the associated tasks and reminders within the current matter, along with all their details.

M00000229 Legal Opinion on Purchase Agreement for BLP
Matter - Corporate Matter

General Info

Tasks

Reminders

Emails **New**

Related Advisor Tasks

Bills

Attachments

Expenses

Time Entries

Invoices

Matters

Contracts & Documents

Settings

Trust 8,520.00 USD

Paid 2,100.00 USD

Due 0.00 USD

Billable 5,750.00 USD

Search Task

Actions

Add New Task

Action	Task ID	Title	Task Type	Workflow Status	Description	Priority	Location	Assigned to
<input type="checkbox"/>	T00000238	Agreement Review	Legalisation	1-Open		medium		Carolina Robinson
<input type="checkbox"/>	T00000221	Follow up with the client	Follow up	1-Open		medium		Alice Jones
<input type="checkbox"/>	T00000220	Attach Doc	Attach Docs on Ap...	1-Open		medium		Alice Jones

Furthermore, you can send your matter updates by email and track all the related email conversations.

M00000229 Legal Opinion on Purchase Agreement for BLP
Matter - Corporate Matter

General Info

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Invoices

Matters

Contracts & Documents

Settings

Compose

Search All Conversations

Legal Advice on Purchase Agreement

Alice Jones <jonesalice21@gmail.com>
To: michaelcavin@outlook.com <michaelcavin@outlook.com>

Tuesday, May 23, 2023, 12:21 PM

Re: Legal Advice on Purch... Oct 10, 2023
Caroline AI Mrawed <caroline.moraod@app4legal.com>
To: Alice Jones <jonesalice21@gmail.com>

Re: Legal Advice on Purch... Oct 10, 2023
Caroline AI Mrawed <caroline.moraod@app4legal.com>
To: Alice Jones <jonesalice21@gmail.com>

Legal Advice on Purchase ... May 23, 2023
Alice Jones <jonesalice21@gmail.com>
To: michaelcavin@outlook.com <michaelcavin@outlook.com>

Legal Advice on Purchase ... Mar 31, 2023
Alice Jones <jonesalice21@gmail.com>
To: Caroline AI Mrawed <caroline.moraod@app4legal.com>

Legal Advice on Purchase ... Mar 31, 2023
Alice Jones <jonesalice21@gmail.com>
To: Caroline AI Mrawed <caroline.moraod@app4legal.com>

Hi Carolina,
You can find the details of the matter below
This Agreement has been entered into on the date of 5/3/2023 and is by and with the Branding Company

For purposes of this Agreement, "Confidential Information" shall include all information or material that has or could have commercial value or other utility in the business in which the Disclosing Party is engaged. If Confidential Information is in written form, the Disclosing Party shall label or stamp the materials with the word "Confidential" or some similar warning. If Confidential Information is transmitted orally, the Disclosing Party shall promptly provide a written indicating that such oral communication constituted Confidential Information.

Sales Contract.pdf 1.2 KB

ASSET PURCHASE... 62.3 KB

The Attachments Tab lets you organize folder structures and upload and manage documents related to this matter.

General Info

Tasks

Reminders

Emails **New**

Related Advisor Tasks

Bills

Attachments

Expenses

Time Entries

Invoices

Matters

Contracts & Documents

Settings

Trust 8,520.00 USD

Paid 2,100.00 USD

Due 0.00 USD

Billable 5,750.00 USD

>Archived Hard Copies

App4Legal Documents Google Drive OneDrive Dropbox URL's

+ New Upload

Search M229

M229

Name	Type	Status	Keywords	File Size	Added On	Added By	Modified By
Email Attachments				-	2023-05-23 08:0...	Carolina Robinson	Carolina Robins
Matter Notes Attachments				-	2023-05-22 15:15...	Carolina Robinson	Carolina Robins
Business Purchase Agreement.docx		1-Draft		66.3 kB	2023-05-22 17:4...	Carolina Robinson	Carolina Robins
Legal Requests.docx		1-Draft		18.0 kB	2023-06-27 11:41...	Alice Jones	Alice Jones

In addition, record expenses and time logs, so you can determine what to invoice later.

M00000229 Legal Opinion on Purchase Agreement for BLP
Matter - Corporate Matter

Trust 8,520.00 USD | Paid 2,100.00 USD | Due 0.00 USD | Billable

Time entry
Export to Excel
Start Timer
Bulk Transfer to another Matter

Date	User	Effort	Rate	Category	Internal Status	Billable	Descriptor
2023-09-12	Carolina Robinson	30m (0.50h)	Default Rate	Drafting		Yes	2023-06-10-24
2023-06-23	Carolina Robinson	2h 30m (2.50h)	500	Meeting	Reviewed	Yes	
2023-06-21	Carolina Robinson	2h 30m (2.50h)	500	Meeting	Reviewed	Yes	
2023-06-20	Carolina Robinson	2h 30m (2.50h)	500	Meeting	Reviewed	Yes	
2023-06-19	Carolina Robinson	2h 30m (2.50h)	500	Meeting	Reviewed	Yes	
2023-06-16	Carolina Robinson	2h 30m (2.50h)	500	Meeting	Reviewed	Yes	
2023-05-26	James Marven (Inactive)	1h (1.00h)	Default Rate	Meeting	To-Be Reviewed	Yes	Meeting v
2023-05-26	James Marven (Inactive)	30m (0.50h)		Meeting	To-Be Reviewed	No	Meeting v
2023-05-23	Carolina Robinson	1h (1.00h)	Default Rate		To-Be Reviewed	Yes	
2023-05-23	Carolina Robinson	1h (1.00h)	Default Rate	Planning	To-Be Reviewed	Yes	FRA-CT-2 *Employ

Filter: Related Entity: App4Legal-USD (USD)
User: Username
From: YYYY-MM-DD
To: YYYY-MM-DD

Balance: Total Effort: 16h 30m
Billable: 16h
Non-billable: 30m
Total: 8,000.00 USD

Moreover, you can check all the invoices related to this matter from the **Invoices** tab.

M00000229 Legal Opinion on Purchase Agreement for BLP
Matter - Corporate Matter

Trust 8,520.00 USD | Paid 2,100.00 USD | Due 0.00 USD | Billable 5,750.00 USD

Invoices

Invoice Date	Invoice#	Prefix Type	Client's Account	Client Account Number	Total
2023-05-26	INV0000084	Invoice Number Prefix	BLP Industry - USD	null	2,100.00 USD
2023-05-19	INV0000083	Invoice Number Prefix	BLP Industry - USD	null	2,750.00 USD

Filter: Related Entity: App4Legal-USD (USD)
Currency: USD

Billing Preferences: Billing Method: Hourly Rate

Sub Total: Services: 1,000.00 USD
Expenses: 1,100.00 USD
Time Entries: 2,750.00 USD
Bill Items: 0.00 USD

Last but not least, you can link a Matter to an existing Matter or Contract in LEXZUR. You can also adjust the users' rates, matter rate, capping, partners' percentage, and the billing preferences of this Corporate Matter from the Settings tab.

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

Thank you!