

# How to Manage Matter Containers

## Objectives

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

## Steps

In LEXZUR, you can easily and efficiently manage your matter containers. First, you have to add matter container to your database. You do that quickly from the **Create** button in the main menu.

LEXZUR

[Dashboards](#) • 
 [Agile](#) • 
 [Contacts](#) • 
 [Matters](#) • 
 [Tasks](#) • 
 [Contracts & Documents](#) • 
 [Reports](#) • 
 [Time](#) • 
 [Billing](#) • 
 [More](#) • 
 Create +

## Matter Container

1 - 11 of 11 items 🔍

ID	Name	Practice Area	Status	Client Name
MC00012	<a href="#">Albert Dave</a>	Administrative	On-hold	Albert Dave
MC00011	<a href="#">Bank ABC Matters</a>	Agreement	Ongoing	Bank of California
MC00010	<a href="#">Echo tech Solutions</a>	Case of Intellectual Property	Open	Green Tech Inc.
MC00009	<a href="#">Alvah Agency Labor Matters</a>	Labor	Cancelled	Alvah Agency
MC00008	<a href="#">AdS Commercial Requests</a>	Commercial	Ongoing	Advanced Solution
MC00007	<a href="#">Global Tech Consultation</a>	Consultation	Open	Global Tech
MC00006	<a href="#">BLP Matters</a>	Commercial	Ongoing	BLP industry

Company
Person

---

Corporate Matter
Litigation Case

---

Hearing
Matter Container ←

---

Contract/Document from Template
Upload Contract/Document

---

Intellectual Property
Task

---

Time entry

There are 4 required fields:

- Name
- Status
- Practice Area
- Arrival Date

New Matter Container

Name\*

Alvah Agency Labor Matters

Description

Status\*

Ongoing

Practice Area\*

Civil

Client Name

Company / Group

Client Position

None

☒ Send Notification by email

Save

Cancel

New Matter Container

Start typing to select from possible matches.

Opponent Position

None

Add more

Assigned Team

All Teams

Assignee

---

Arrival Date\*

2023-11-30

Closed On

YYYY-MM-DD

Internal Ref Number

Comments

☒ Send Notification by email

Save

Cancel

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 the description, client position, opponent, opponent position, requested by, assignee and so on.

Once you've added your matter container, you can now manage all related information.

You can start by using the advanced filters that will help you search for Matter container based on criteria of your selection.

For example, you can search for matter container by Practice Area.

**Matter Container Search Filters**

Matter Container ID: Equal   
Matter Container Name: contains   
Matter Container Desc.: contains   
Practice Area: Equal  Civil   
Assignee: contains  Start typing

Matter Container Status: Equal  Select   
Matter ID: Equal   
Matter Name: contains   
Assigned Team: Equal  Select   
Internal Ref Number: contains

More Filters Criteria

Reset Submit [Hide]

**Matter Container** All  Save as

1 - 2 of 2 items  Search  **Advanced** Columns

ID	Name	Practice Area	Status	Client Name	Client Position	Requested by	Opponents	Assigned Team	Assignee	Arrival Date
MC00009	Alviah Agency Labor Matters	Civil	Cancelled	Alviah Agency				All Teams	Carolina Robinson	2023-07-03
MC00002	شركة الجراح	Civil	Cancelled					All Teams		2021-12-15

You can click on the Matter container's name or ID to open its page and edit or capture more information.

MC00010: Back Boss Company ●
Edit

Status: 1-Open  
Description:  
Client Position: Plaintiff  
Opponents:  
Assigned Team: Litigation Team  
Arrival Date: 2021-03-03  
Internal Ref Number: 009856

Practice Area: Civil  
Client Name: BackBoss Company  
Client Foreign Name:  
Opponent Foreign Name:  
Assignee: Jad Herbert  
Closed On:  
Requested By: William Sam Garrett

General Info Related Documents

Comments

You can relate matter containers by simply entering the matter container name and then press on the add button.

Relate Matter Container
Add

Containers

ID	Name	Status	Client	Client Foreign Name	Opponents	Opponent Foreign Name	Assignee	Practice Area	Arrival Date	Closed On	Internal Ref Number	Actions
MC00007	Agency vs Back Line Company	2-In Progress	Agency Grid		Back Line Company	Back Line Company	Garry Malbeck	Commercial	2019-09-29			<input type="text"/>

You can also relate matters by simply entering the matter ID, matter name or the client name and then press on the add button.

You have the option also to click on "Show latest stage only" checkbox and to add corporate matter, litigation case and intellectual property directly from this page.

Relate Matter

M20, Matter Name or Client Name

Add

☐ Show latest stage only

[Add Corporate Matter](#)

[Add Litigation Case](#)

[Add Intellectual Property](#)

Litigation Cases

Matter ID	Name	Internal Ref Number	Client	Client Foreign Name	Opponents	Opponent Foreign Name	Assignee	Practice Area	Status	Filed on	Due Date	Actions
M00000171	Criminal Agency Grid x Brandlair	Rn12344322	Agency Grid		Brandlair - Co-defendant	Brandlair - Co-defendant	<a href="#">Evrin Mert</a>	Criminal	1-Open	2021-01-31	2021-02-07	
Stage		First Instance Degree		Court Type		Court						
Client Position		Defendant		Court Degree / Circuit		Court ref						
Judgment Date				Court Region		Opponents		Brandlair - Co-defendant				

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

Thank you!