

How to Manage the Folder Structure in Companies

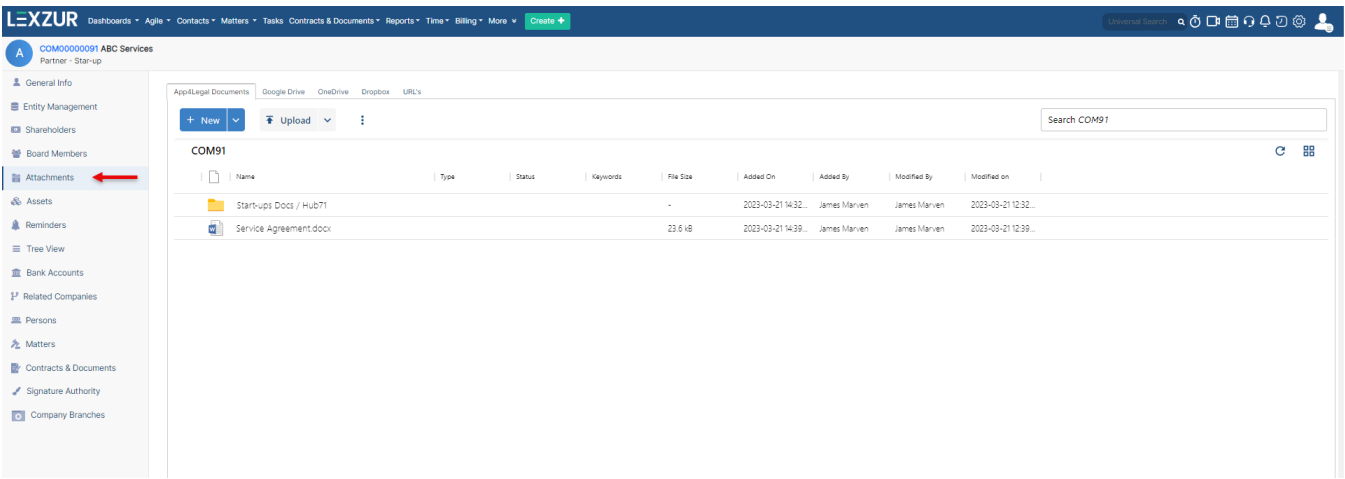
Objectives

- Create or upload files/folders related to a company
- Manage the attachments (Edit, Share, Set Privacy, Search...)

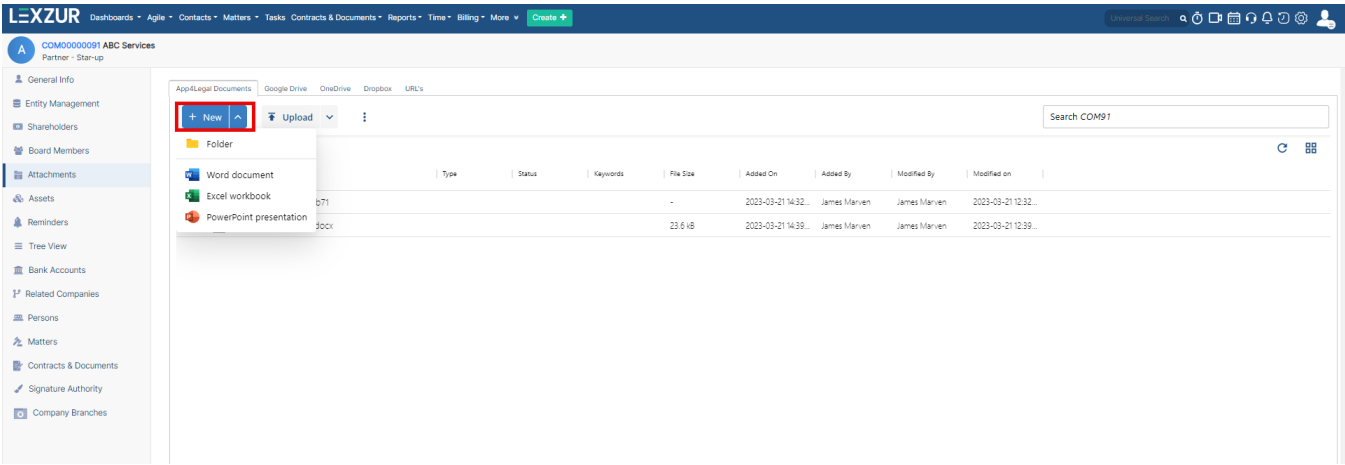
Steps

Within each company page, there is a dedicated **"Attachments"** tab.

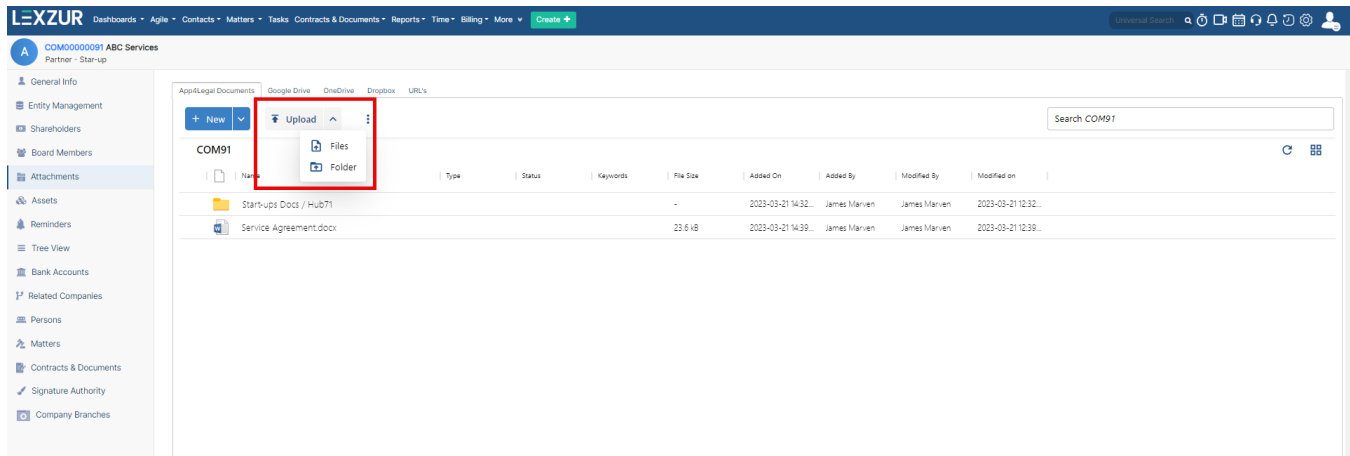
This tab serves as a centralized repository for all company-related attachments, encompassing a wide range of items including contracts, documents, legal files, licenses, meeting notes, etc.



You can start by creating New Folders, Word Documents, Excel, and PowerPoint.



To upload a file, you can simply drag & drop them from your Windows or Mac from file viewer. You can also upload a file or folder from the **Upload** button.

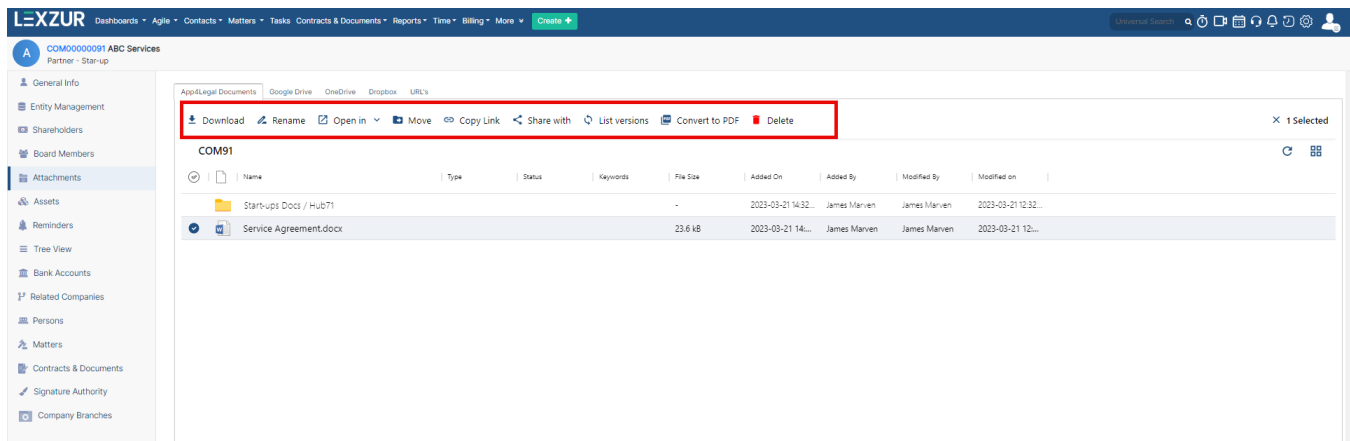


Once your documents and folders have been added, you can modify them as needed.

The File/Folder can be managed by simply selecting the attachment you want on the grid, and all the actions will be visible at the top of the page.

You can Rename, Move, Open, Delete, Share, and much more:

- **Download:** download the selected document.
- **Rename:** rename the selected document.
- **Open in:** you can open your document in **Word for the web** or **LEXZUR Editor** to make the necessary changes to the document.
- **Move:** move the file to a folder.
- **Copy:** copy the file's link.
- **Share with:** share the file with specific people. You can limit their permissions to editors or viewers.
- **List Versions:** this shows all the version history of the file if it was edited.
- **Convert to PDF**
- **Delete**



Files could be opened either using Word for the web or Lexzur Editor a tool that allows users to directly open and modify different files (Word, Excel, PDF, PowerPoint, etc..).

The Editor will automatically upload a newer version of the document into Lexzur after saving. You can then see the list of versions this document has, the user who added each version, and the date and time, and you can click on any older version to download it.

Version history			
Versions	Added By	Added On	Actions
1	Carolina Robinson	2023-10-25 11:55:35	Download

Cancel

Folders can also be made private so that only specific people with access can open them or share them with external parties.

Therefore, select the folder and choose **"Share with"** from the options on the top.

Add the recipients, the users who will give the access, specify the permission as Editor or just Viewer and save.

Share with Recipients

IP00000307_202310241531.docx

Add Recipients

Add people, groups, or email

Maria Dave

Permission

Editor

Viewer

Editor

App4Legal access

Restricted

Only people with access can open the item

MD Maria Dave
manal.zeidan@lexzur.com

Editor

Cancel Save

In addition, the smart search tool allows you to search for any document. The search will return all files and folders related to the word you added in the search box.

Moreover, LEXZUR 360 Docs is an all-in-one smart and searchable, central repository embedded in LEXZUR. It is used to store all your personal and shared documents on LEXZUR and other Cloud Document Management Solutions such as Google Drive, One Drive, Dropbox, and SharePoint.



You must first enable the integration to use the 360 Docs. [Learn more here](#)

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

Thank you!