How to Link a Person/ Matter/ Contract to a Person
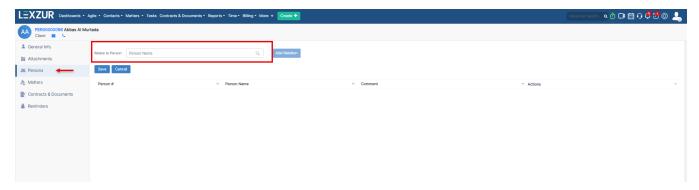
Objectives

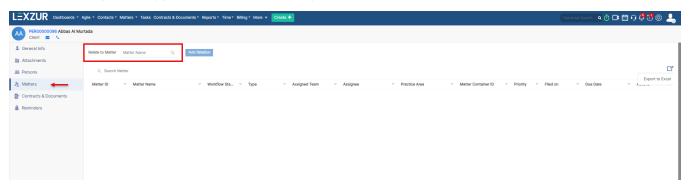- Link an existing person/ matter/ contract to the person

Steps

The **Person** tab is utilized to monitor individuals associated with a specific person.

To establish a connection with a person, you can easily search for their name and then click on the **"Add Relation"** button.

Matters tab is used to store matters related to the person.

To relate the matter, you can simply write the matter name and then press on the **Add Relation** button.

To the right, we have the Export button option, which allows you to export all the matters related to the person to Excel.

Contracts & Documents tab is used to keep track of contracts related to a Person.

To relate the contract, you can simply search for the contract name and then press on the **Add Relation** Button.

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

Thank you!