

# 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.

The screenshot shows the LEXZUR interface for a client named Abbas Al Murtada. The 'Persons' tab is selected in the left sidebar, indicated by a red arrow. The main area displays a search bar labeled 'Relate to Person' with a placeholder 'Person Name' and a magnifying glass icon. To the right of the search bar is a blue button labeled 'Add Relation'. Below the search bar are 'Save' and 'Cancel' buttons. A table with columns 'Person #', 'Person Name', 'Comment', and 'Actions' is visible below the search area.

**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.

The screenshot shows the LEXZUR interface for the same client. The 'Matters' tab is selected in the left sidebar, indicated by a red arrow. The main area displays a search bar labeled 'Relate to Matter' with a placeholder 'Matter Name' and a magnifying glass icon. To the right of the search bar is a blue button labeled 'Add Relation'. Below the search bar is a 'Search Matter' input field. A table with columns 'Matter ID', 'Matter Name', 'Workflow Sta...', 'Type', 'Assigned Team', 'Assignee', 'Practice Area', 'Matter Container ID', 'Priority', 'Filed on', and 'Due Date' is visible. An 'Export to Excel' button is located on the right side of the table.

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.

The screenshot shows the LEXZUR interface for the same client. The 'Contracts & Documents' tab is selected in the left sidebar, indicated by a red arrow. The main area displays a search bar labeled 'Relate Contract/Document' with a placeholder 'Name' and a magnifying glass icon. To the right of the search bar is a blue button labeled 'Add Relation'. Below the search bar is a 'Search Contract/Document' input field. A table with columns 'ID', 'Name', 'Type', 'Value', 'Assignee', 'Date', 'Start date', 'End date', and 'Actions' is visible.

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

Thank you!