

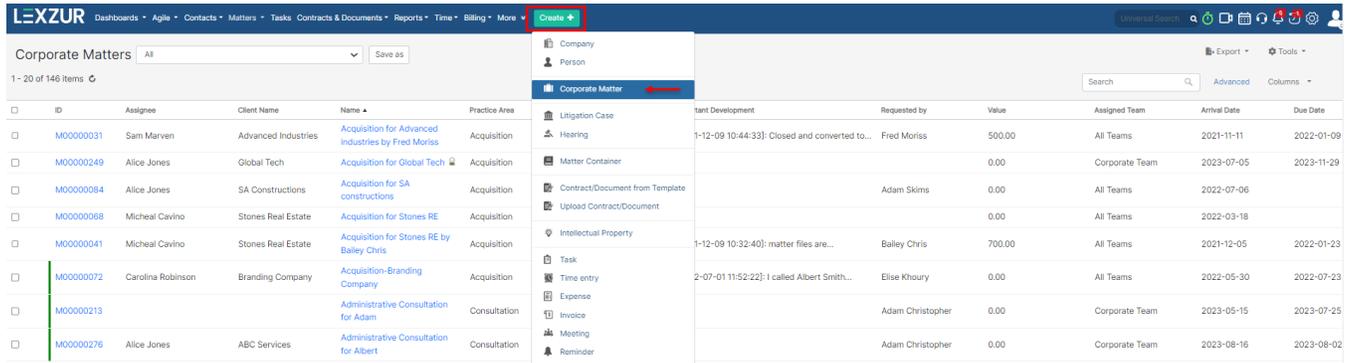
How to Add a New Corporate Matter

Objectives

- Insert a Corporate Matter in the database

Steps

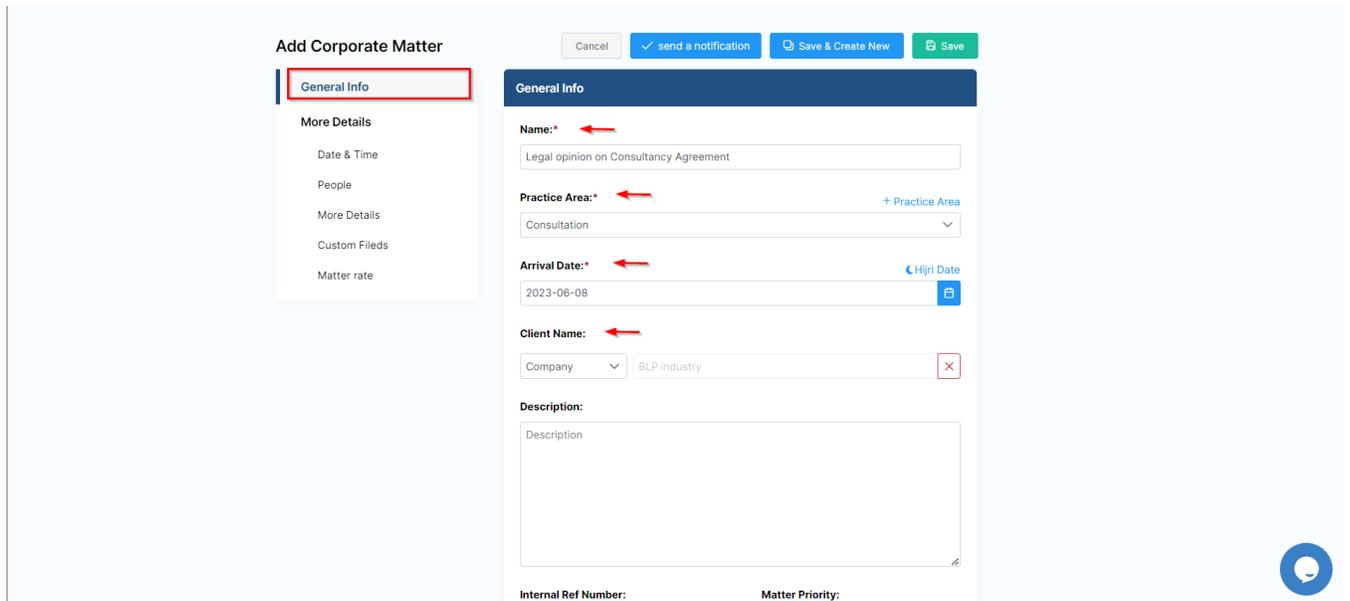
Corporate Matters can be easily added via the **Create** button in the navigation menu:



The screenshot shows the LEXZUR dashboard with a navigation menu at the top. The 'Create' button is highlighted in red. Below the navigation menu, there is a table of Corporate Matters. The table has columns for ID, Assignee, Client Name, Name, Practice Area, Requested by, Value, Assigned Team, Arrival Date, and Due Date. The table contains several rows of data, including matters for 'Advanced Industries', 'Global Tech', 'SA Constructions', 'Stones Real Estate', 'Branding Company', and 'ABC Services'.

ID	Assignee	Client Name	Name	Practice Area	Requested by	Value	Assigned Team	Arrival Date	Due Date
M0000031	Sam Marven	Advanced Industries	Acquisition for Advanced Industries by Fred Moriss	Acquisition	Fred Moriss	500.00	All Teams	2021-11-11	2022-01-09
M00000249	Alice Jones	Global Tech	Acquisition for Global Tech	Acquisition		0.00	Corporate Team	2023-07-05	2023-11-29
M00000084	Alice Jones	SA Constructions	Acquisition for SA constructions	Acquisition	Adam Skims	0.00	All Teams	2022-07-06	
M00000068	Michéal Cavino	Stones Real Estate	Acquisition for Stones RE	Acquisition		0.00	All Teams	2022-03-18	
M00000041	Michéal Cavino	Stones Real Estate	Acquisition for Stones RE by Bailey Chris	Acquisition	Bailey Chris	700.00	All Teams	2021-12-05	2022-01-23
M00000072	Carolina Robinson	Branding Company	Acquisition-Branding Company	Acquisition	Elise Khoury	0.00	All Teams	2022-05-30	2022-07-23
M00000213			Administrative Consultation for Adam	Consultation	Adam Christopher	0.00	Corporate Team	2023-05-15	2023-07-25
M00000276	Alice Jones	ABC Services	Administrative Consultation for Albert	Consultation	Adam Christopher	0.00	Corporate Team	2023-08-16	2023-08-02

You will be asked to fill out some mandatory fields and additional matter details:



The screenshot shows the 'Add Corporate Matter' form. The 'General Info' tab is selected and highlighted with a red box. The form contains several fields with red arrows pointing to them, indicating they are mandatory: 'Name', 'Practice Area', 'Arrival Date', and 'Client Name'. The 'Name' field contains 'Legal opinion on Consultancy Agreement'. The 'Practice Area' field is set to 'Consultation'. The 'Arrival Date' field is set to '2023-06-08'. The 'Client Name' field is set to 'Company' and 'BLP industry'. There is also a 'Description' field and a 'Save' button.

First, within the **General Info** tab, specify the name, area of practice, matter arrival date, and so on...

- **Name:** Enter a name for the matter - this will make it easier to search for later.
- **Practice Area:** A customizable list for defining the related area of practice for this matter. For example, Legal Consultancy, Settlement, Acquisition, Administrative, etc...
- **Arrival Date:** When this matter reaches your office, by default, it takes the current date.



The 3 fields above are sufficient for creating matters, however, you can add more information for reporting purposes

Additionally, you can describe the matter and identify the client requesting it, search for existing clients, or add new ones on the fly, specify the internal reference number, priority, privacy, and attach any related files if needed.

Add Corporate Matter

Cancel send a notification Save & Create New Save

General Info

More Details

Date & Time

People

More Details

Custom Fileds

Matter rate

Description:

Description

Internal Ref Number: 5892/2023

Matter Priority: High

Shared With: @Default User(s)

Drop files here to upload or [Browse](#)

Under the **More Details** tab, provide some extra details such as dates, related people, custom fields, rates, and so on:

Date & Time:

Some information includes:

- **Filed on:** the date on which you started working on the Matter.
- **Due Date:** Whether a deadline is imposed by the client or from your end.
- **Estimated Effort:** You can add an estimate of how much effort this Matter will require (This can later be compared with the actual effort from the Time Logs that are recorded on the matter)

Add Corporate Matter

Cancel send a notification Save & Create New Save

General Info

More Details

Date & Time

People

More Details

Custom Fileds

Matter rate

More Details

Date & Time

Filed on: 2023-06-15

Due Date: 2023-10-31

Closed On:

Estimated Effort: 0

Date:

People

More Details

Custom Fileds

People:

Includes related people details such as:

- **Requested by:** the specific contact who requested this Matter.
- **Assignee:** The specific LEXZUR user, who is assigned to this matter, will belong to the chosen Assigned Team.
- **Assigned Team:** Select the Team that will be working on this Matter.

By default, all Users belong to the Team called All Teams. However, you can create multiple teams to reflect your workplace.

Add Corporate Matter Cancel send a notification Save & Create New Save

General Info

More Details

Date & Time

People

More Details

Custom Fileds

Matter rate

People

Referred By:
Start typing

Requested by: ←
Start typing

Assigned Team: ←
Corporate Team

Assignee: ← [+ Click to Add Users to the Team](#)
Start typing

Company
Start typing

Person
Start typing

User
Start typing

More Details

And the names of any related company or person as well.

More Details:

- **Stage:** A customizable list that depicts the progress of the matter on the legal side.
- **Matter Container:** In case you've defined a Matter container you can link this new Matter to its related container.
- **Value:** A monetary value to this Corporate Matter.

Add Corporate Matter Cancel send a notification Save & Create New Save

General Info

More Details

Date & Time

People

More Details

Custom Fileds

Matter rate

More Details

Date & Time

People

More Details

Stage: [+ Add Stage](#)
select an option

Matter Container: ←
Start typing

Value: ←
0

Custom Fileds

Matter rate

Custom Fields:

Fill out the custom fields while adding the matter if necessary.

Add Corporate Matter

Cancel send a notification Save & Create New Save

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

People >

More Details >

Custom Fileds v

Billing Arrangement

Department
select an option v

Custom Field 1

Custom Field 3

Custom Field 2

Matter Rate:

Add any specific rate for this matter as well.

Add Corporate Matter

Cancel send a notification Save & Create New Save

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

More Details

- Date & Time** >
- People** >
- More Details** >
- Custom Fileds** >
- Matter rate** v

Entity Name: ←

select an option v

Rate: ←

Rate

+ Add Entity Rate

Now you have added your corporate matter, you can go further with additional steps such as adding related tasks, reminders, or attachments.



The Matter has been created successfully.

M00000481

Now you can go further, for more steps

 **Add Task** 

 **Add Reminder** 

 **Add Documents** 

 **Skip**

You can now track and manage all your corporate matters from one grid.

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

Corporate Matters All Save as

1 - 20 of 146 items

ID	Assignee	Matter Containers	Name	Practice Area	Workflow Status	Important Development	Requested by	Value	Assigned Team	Arrival Date	Due Date
M0000031	Sam Marven	Litigation Cases Hearings Intellectual Properties	Acquisition for Advanced Industries by Fred Moriss	Acquisition	Closed	[2021-12-09 10:44:33] Closed and converted to...	Fred Moriss	500.00	All Teams	2021-11-11	2022-01-09
M00000249	Alice Jones	Global Tech	Acquisition for Global Tech	Acquisition	1-Review			0.00	Corporate Team	2023-07-05	2023-11-29
M00000084	Alice Jones	SA Constructions	Acquisition for SA constructions	Acquisition	Open		Adam Skims	0.00	All Teams	2022-07-06	
M00000068	Michael Cavino	Stones Real Estate	Acquisition for Stones RE	Acquisition	Open			0.00	All Teams	2022-03-18	
M00000041	Michael Cavino	Stones Real Estate	Acquisition for Stones RE by Bailey Chris	Acquisition	Open	[2021-12-09 10:32:40]: matter files are...	Bailey Chris	700.00	All Teams	2021-12-05	2022-01-23

 Learn more about how to manage your corporate matters [here](#).

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

Thank you!