

# How to Generate Companies Reports

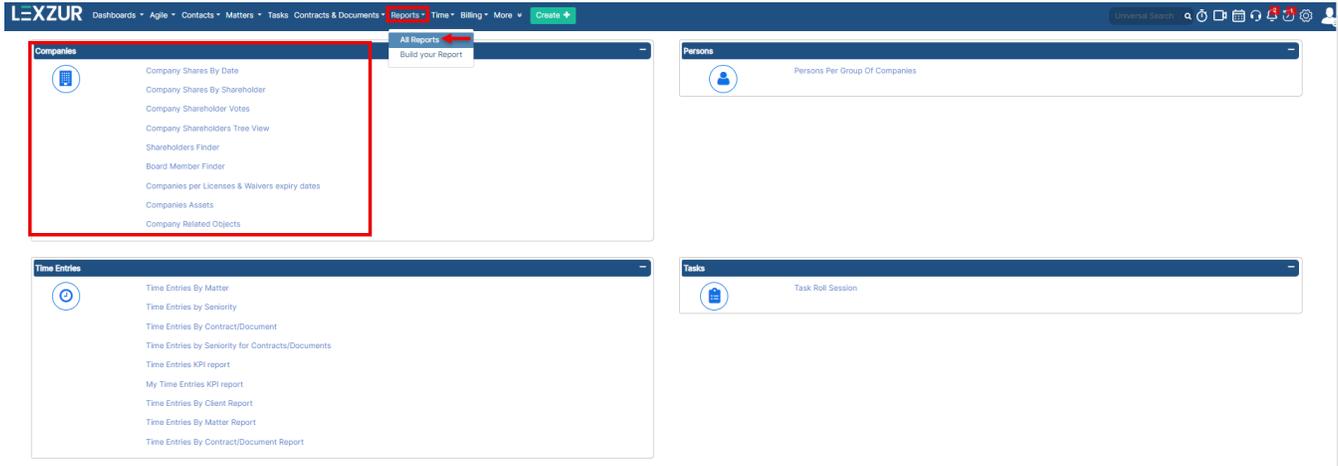
## Objectives

- Generate Reports Related to Companies

## Steps

In LEXZUR, you have many useful predefined **Reports** that are segregated as per each related module.

The Reports module can be accessed by clicking on Reports All Reports from the main menu.



### Company Shares by Date:

The company Shares By Date report requests the user to choose the Company in question.

[Reports](#) / [Company Shares By Date](#)

## Company Shares By Date

Company

Start typing to select from possible matches.

Submit

Once the Company is chosen, the Report will display the Shares History and current status of the chosen Company.

This report shows the List of Transfers along with the related information. It also displays a summary of the current Shareholders.

Shares by Date Report for "Back Line Company" as of 2021-09-30

Show Movement for Choose Shareholder ⚙️

	Initiated on	Shareholder Name	Type	Executed on	Nb. of Shares	Category	Certificate Nb.	Shares Nb. From-To	Comments
⚙️		Brand Line Company	Incorporation		30.00				
⚙️	2021-01-04	Coolpany	Increase In Capital	2021-01-19	10.00			From:001 - to:010	
⚙️	2021-01-12	Alvah Batz	Increase In Capital	2021-01-27	15.00			From:001 - to:015	
Total Nb. of Shares: 55.00									

Current Shareholders:

Shareholder Name	Share Par Value: 12.00 USD	Number of Shares	Percentage(%)	Shares Value (USD)
Brand Line Company		30.00	26.0870	360.00
Alvah Batz		15.00	13.0435	180.00
Coolpany		10.00	8.6957	120.00
		<b>Total:</b> 55.00	<b>47.8261%</b>	<b>660.00</b>

- Users can filter out the information of only one Shareholder using the "Show Movements for" filter.
- Using the action wheel, there is a possibility to edit mistaken data.
- Using the action wheel on the top right, you can export to excel or word.

**Company Shares by Shareholders:**

Company Shares By Shareholder report requests the user to choose the Company in question.

Once the Company is chosen, the Report will display the Shares Movement History.

Reports / Company Shares By Shareholder

Shares by Shareholder Report for "ABC Services" as of 2023-10-21

Show Movement for Choose Shareholder ⚙️

Type	Initiated on	Executed on	Nb. of Shares	Shares Nb. From-To	Category	Certificate Nb.	Comments
Shareholder : abc							
Incorporation			20.00				
Incorporation			20.00				
Incorporation			10.00				
			Nb. of Shares: 50.00				
Total Nb. of Shares: 50.00							

Current Shareholders:

Shareholder Name	Share Par Value: 100.00	Number of Shares	Percentage(%)	Shares Value ()
abc		50.00	100.0000	5,000.00
		<b>Total:</b> 50.00	<b>100.0000%</b>	<b>5,000.00</b>

This report shows the Shares Movement History along with the related information.

- It also displays a summary of the current Shareholders.
- Users can filter out the information of only one Shareholder using the "Show Movements for" filter.
- Using the action wheel on the top right, you can export to Excel or Word.

**Company Shareholder Votes:**

Company Shareholder Votes report requests the user to choose the Company in question.

Once the Company is chosen, the Report will display the Number of Votes by the Shareholder.

The report shows the number of votes before and after the number of configured years. This report highly depends on the user configuration.

Number of votes by shareholders for "Back Line Company" as of 2021-09-30



Shareholder Name	Shareholder Type	Net Nb. Of Shares before (1) Years Interval	Net Nb. Of Shares after (1) Years Interval	Nb. Of Votes
Coolpany	Company	0.00	10.00	10.00
Alvah Batz	Person	0.00	15.00	15.00
Total Nb. of Shares: 25.00				

Current Shareholders:

Shareholder Name	Share Par Value: 12.00 USD	Number of Shares	Percentage(%)	Shares Value (USD)
Brand Line Company		30.00	26.0870	360.00
Alvah Batz		15.00	13.0435	180.00
Coolpany		10.00	8.6957	120.00
		<b>Total:</b> 55.00	47.8261%	660.00

### Company Shareholder Tree View:

Company Shareholders Tree View report requests the user to choose the Company in question.

Once the Company is chosen, the Report will display the Shares of the Company in a tree view format. The tree can be expanded and collapsed as desired. Upon hover, over the values, the system will give you the precise number.

## Company Shareholders Tree View

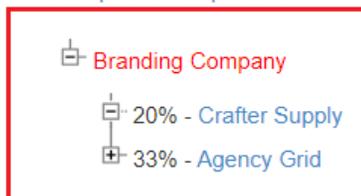
Company

Branding Company (BC)



Start typing to select from possible matches.

Collapse All / Expand All



### Shareholders Finder:

Shareholder Finder report requests the user to choose the type of the Shareholder in question. It can be a Company or a Person. All you have to do is to insert the name of the Shareholder.

This report will show all the companies where this Company/Contact is a Shareholder.

### Shareholders Finder

Type  Shareholder

"Alvah Batz" is a shareholder in the following companies as of 2021-09-30

Company Name	Company Total Shares	Shareholder Shares	Shareholder Shares Percentage	Share Par Value	Shareholder Shares Value
Brand Line Company	9,000.00	6,999.00	77.7667%	4,000.00	27,996,000.00
Agency Grid	3,001.00	1.00	0.0333%	1.00 USD	1.00 USD
Back Line Company	115.00	15.00	13.0435%	12.00 USD	180.00 USD

### Board Member Finder:

Board Member Finder report requests the user to choose the type of the Board Member in question. It can be a Company or a Person. All you have to do is to insert the Name of the Board Member.

This report will show all the companies where this Company/Contact is a Board Member in.

### Board Member Finder

Type  Board Members

"Michael James" is a board member in the following companies as of 2021-09-30

Company Name	Role	Permanent Representation	Designation Date	Until	Comments
Crafter Supply	CEO	Net Set	2021-03-01	2022-03-03	

### Companies per Licenses & Waivers expiry dates:

This report will centralize all the expiry dates of Companies. The report will display the Company ID, Company Name, Company Legal Type, Company Type, released on, Expires On, Nationality of the Company, reference number, the user to be reminded, etc.

Companies per Licenses & Waivers expiry dates [Advanced Search](#) [Actions](#)

Company ID	Company Name	Legal Type	Type	Released On	Expires On	Nationality	Remind	User Groups	Reference N...	License Acti...	Managers	Permissions
COM00000049	Brand Line Company		General Business License	2022-08-18	2022-12-29		James Marven					
COM00000050	BTL Insurance		General Business License	2022-09-23	2023-01-12	United States	James Marven					
COM00000050	BTL Insurance		General Business License	2022-09-15	2023-01-18	United States	James Marven					
COM00000050	BTL Insurance		Commercial License	2022-09-26	2023-01-31	United States	Alice Jones, James Marven					
COM00000050	BTL Insurance		Passport License	2022-09-26	2023-01-31	United States	Aleen Peterson, Asmaa Asmaa(Inactive), James Marven		Mr. Smither			
COM00000050	BTL Insurance		Passport License	2022-09-26	2023-01-31	United States	James Marven		Sarah			
COM00000086	CBD		Trade License	2023-02-28	2023-04-27		James Marven					
COM00000059	BLP industry	Limited Liability Company (LLC)	Trade License	2023-03-28	2023-06-29	Albania	James Marven					
COM00000071	abc		POA	2023-02-16	2023-09-30		James Marven					
COM00000071	abc		Commercial License	2023-07-27	2023-11-30		Carolina Robinson, Sam Marven					Cars

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### Companies Assets:

This report will centralize all the assets of Companies.

The report will display the Company, the name of the asset, the type, the reference number, and a description of the asset.

Assets

Advanced Search

Actions

Company	Name	Type	Ref	Description	Do you have copy of ...	Do you have Partner's...	Do you have license o...	The Registered Date
Agent LLC	Tiger Building	Real Estate	112/2021				Yes	
Bouba Company	Tractor	Farm equipment		John Deer 2007				
Back Line Company	Blue building	Real Estate	Rn12342		Yes	Yes	Yes	2021-01-20
Agency Grid	Meadows	Real Estate	Rn456734					
Coolpany	Diamond tower	Real Estate	NY123454	Carter has a tower in downtown				
Tiger Real Estate	Tiger Building	Real Estate	123	assdadsd				
Harel Malac technologies	Tiger Tower	Real Estate						
Business Direct Company	Tower	Real Estate						
International Bank	Tower	Real Estate	12131	assdad			Yes	2020-05-12
Fouronenine UK	Manchester Building	Real Estate	112/2212		Yes	Yes	Yes	

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Company Related Objects:

Company-related objects report requests the user to choose the name of the company.

This report will give all the related litigation cases, corporate matters, and contracts with their statuses, practice areas, assignee, internal reference number, the requested by and the arrival and closed on date.

1- Back Line Company

Related Matter Containers								
Matter Container	Status	Practice Area	Assignee	Internal Ref Number	Arrival Date	Closed On	Requested By	
MC00005: Criminal Agency grid	6-Review	Administrative	Michael James	RN45678456	2019-04-27	No Data	Bernadette Kuhlman	
MC00007: Agency vs Back Line Company	2-In Progress	Commercial	Garry Malbeck	No Data	2019-09-29	No Data	Eleanor David Jensen	

Showing 1 to 2 of 2 entries Previous 1 Next

Related Litigation Cases								
Litigation Case	Status	Practice Area	Assignee	Internal Ref Number	Arrival Date	Closed On	Requested By	
M00000180: Criminal -Alvah x Back Line	1-Open	Criminal	Garry Malbeck	11546/2021	2021-03-10	No Data	Chris Williams	
M00000213: Back Line Company x Alvah	4-In Progress	Criminal	Garry Malbeck	RN1234332	2021-09-16	No Data	Bernadette Kuhlman	

Showing 1 to 2 of 2 entries Previous 1 Next

Related Corporate Matters								
Corporate Matter	Status	Practice Area	Assignee	Internal Ref Number	Arrival Date	Closed On	Requested By	
M00000165: Legal opinion on Service Agreement for Back line company	4-In Progress	Legal Opinion	Jad Herbert	RN123343	2021-01-05	No Data	Mayra Augustin	
M00000148: Legal Opinion on Service	1-Open	Legal Opinion	Michael James	AG54	2020-11-23	2021-02-04	Patricia McClelland	

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

Thank you!