## How to Apply Filters on Matters

## **Objectives**

- Advanced search and create filters
- Quick search using filters

## Steps

Each grid in Lexzur provides users with the flexibility to search for desired items easily using various criteria tailored to their needs. This allows users to create and save their filters for reporting purposes. Here's how to do it in Matters:

• Navigate to the Matters Module. Click on "Corporate Matters," "Litigation Cases," or "Matter Containers" to access the list of matters.

Corn	orate Matte	ore All	Corporate Matters	Save as							B. Export *	🌣 Tools 👻
1.1	146 items o		Litigation Cases Hearings							Search	Q, Advanced	Columns 👻
	ID	Assignee	Matter Containers	Name 🔺	Practice Area	Workflow Status	Important Development	Requested by	Value	Assigned Team	Arrival Date	Due Date
I	M0000031	Sam Marven	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
	M00000249	Alice Jones	Global Tech	Acquisition for Global Tech	Acquisition	1-Review			0.00	Corporate Team	2023-07-05	2023-11
	M0000084	Alice Jones	SA Constructions	Acquisition for SA constructions	Acquisition	Open		Adam Skims	0.00	All Teams	2022-07-06	
	M0000068	Micheal Cavino	Stones Real Estate	Acquisition for Stones RE	Acquisition	Open			0.00	All Teams	2022-03-18	
	M00000041	Micheal 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	2022-0
	M0000072	Carolina Robinson	Branding Company	Acquisition-Branding Company	Acquisition	In Progress	[2022-07-01 11:52:22]: I called Albert Smith	Elise Khoury	0.00	All Teams	2022-05-30	2022-0
	M00000213			Administrative Consultation for Adam	Consultation	In Progress		Adam Christopher	0.00	Corporate Team	2023-05-15	2023-0

• Click on "Advanced" to apply advanced filters. Here, you can tailor your search filter based on specific criteria such as Practice Area, Assignee, Client Name, Dates, and more.

Corporate Matter	r Search Filters							
	Matter ID	contains 🗸	•		Name	contains 🗸		
	Practice Area	Equal		Agreement x	Assigned Team	Equal	Select	
	Assignee	contains 🗸		Start typing Q,	Internal Ref Number	contains 🗸 🗸		
	Workflow Status	Equal		Select	Status Comments	contains 🗸		
More Filters Crit	eria 📖							
Reset Submit								

• Once you've set your desired filters, click on "Submit." The grid will now display only the corporate matters according to your search filter.

Corp	orate Matte	ers All		✓ Save as	-						₽• Export *	🌣 Tools 👻
1 - 20 of	22 items 🖒									Search	Advanced	Columns *
	ID	Assignee	Client Name	Name	Practice Area	Workflow Status	Important Development	Requested by	Value	Assigned Team	Arrival Date	Due Date
0	M00000324	Carolina Robinson	Alice Jones	Legal Advice on Purchase Agreement	Agreement	In Progress	[2023-11-07 13:07:06]: we met with the client 123	Alice Jones	0.00	All Teams	2023-11-07	
	M00000319	Carolina Robinson	Advanced Industries	legal advice for Advanced Industries	Agreement	In Progress	[2023-11-03 16:18:54]: finalizing 123		0.00	All Teams	2023-11-03	
	M00000313	Carolina Robinson	BLPC	Legal Advice on Purchase Agreement	Agreement	3-Closed		Alice Jones	0.00	All Teams	2023-10-27	
	M00000293	Alice Jones	BLP industry	Risk Manag. Operational Readiness	Agreement	1-Review			0.00	All Teams	2023-09-14	
0	M00000237	Alice Jones	BLP industry	legal opinion on Service Agreement	Agreement	In Progress	[2023-06-08 12:25:00]:1233		0.00	All Teams	2023-06-08	
0	M00000234		Dave Security System	Legal Opinion on NDA	Agreement	1-Review			0.00	All Teams	2023-05-30	2023-06-3
	M00000229	Alice Jones	BLP industry	Legal Opinion on Purchase Agreement for BLP	Agreement	In Progress	[2023-05-2 15:47:00]: Settlement Negotiations	Peter Young	0.00	All Teams	2023-05-22	2023-08-3

• To save the filter for future use, click on "Save as." Enter a name for the filter and click on "Save." You have the option also to share this filter with all the users.

Save Filter		×
Filter Name*	Agreement Corporate Matters	
	Save C	lose

• Now, the saved filter will be available in the drop-down list for easy access anytime from the matters grid.

Сог	rporate <mark>M</mark> att		✓ Save as				🔄 Export 👻 🌣 Tools 👻
1 - 20 of	39 items 🖒	All Agreement Corporate Mat Archived	tters			Search Q	Advanced Columns -
	ID	Name Matters Related to Hegma	ann nee	Client Name	Practice Area	Workflow Status	Latest Development
	M00000211	Leg Projects related to Hound Agreement for Bandia	Khulman	Bandia	Acquisition	1-Open	[2021-09-02 09:38:17]:
	M00000172	Document Review on Property Mortgage	Garry Malbeck	BackBoss Company	Consultation	4-In Progress	I had a meeting with the ABC and
	M00000155	Legal opinion for Branding Company	Jad Herbert (Inactive)	Branding Company	Legal Opinion	1-Open	
	M00000153	SLA: Legal Opinion	Jon Bartman	Brancy	Consultation	1-Open	
	M00000152	Legal opinion-Branlair	Jad Herbert (Inactive)	Brandlair	Legal Opinion	1-Open	
	M00000151	Acquisition of Pier Bank	Anastasia Katts	Casual Company	Acquisition	1-Open	
	M00000150	Legal Opinion for Alvah Batz	Fred Morrison	Alvah Batz	Consultation	4-In Progress	[2021-07-15 12:20:13]:
	M00000149	Acquisition of Branding Company by Burley Jast Pollich	Anastasia Katts	Burley Jast Pollich	Acquisition	1-Open	

Additionally, you can directly access the desired list of matters based on your filters from the Matters module in the navigation menu. The list of Advanced filters will be displayed, allowing you to click on the filter directly before opening the matters grid.

Agile - Contacts -	Matters - Tasks Contract	s & Documents - Reports - Time ·	• Billing • More ¥	Create 🕂
	Corporate Matters	All		
	Litigation Cases	Administrative matters		
	Hearings	Advanced solutions matters		
	Matter Containers	Banking Dept matters Carolina Matters		
	Intellectual Properties	Corporate Team Matters Legal Opinion Matters		
		Matters Assigned to Alice		
		Matters Assigned to Carolina Work in progress matters administrative matters		

To enable this feature, go to System Settings System Preferences Setup and Configuration:

LEXZUR Dashboards - Agile - Contacts - Matters - Tasks Contracts	s & Documents * Reports * Time * Billing * More * Create +	Universal Search 🔍 Ō 🗗 🗰 🖓 🖑 🗒 👰
🔀 System Maintenance	User Groups Manage Users	Attachment Type System Settings Document Generator Templates Folder Billing and Plan
License	Import Users from Azure Active Directory User Groups Permissions	Folder Templates Manage Users SLA Management Add User Description interaction
<b>♂</b> <sup>®</sup> System Preferences		DocuSign integration Apps Marketplace Email Templates
Setup & Configuration Notification Scheme	縮重 User Management Reports Users Audit Report Login History Report	<b>Q</b> Intellectual Property
Look & Feel Integrations Task & Triggers Automation	User Management Report	Intellectual Property Rights IP Classes IP Subcategories
Document Content Search (Full Text Search) Custom Integrations Email Customization	😫 , Import Data	IP Statuses IP Names
	Companies Persons Corporate Matters	Petition/Opposition Types Email Templates
Apps     Apps & Configurations	Intellectual Properties Litigation Cases	Hanage Boards

## then navigate to the System Values tab, and set "Show Advanced Menu Items" to "Yes."

Contract/Document Default Values     Business Day Equals     Some       Default Values     Business Week Equals     S     ID     Some       Decugin Integration     Kore fauture clients management     Yes     Some     Some       External Links     Show Advanced Menu Items     Yes     Some     Some       Document Content Search     Vsualize Hijr Calendar Converter     No     Some     Some       Allow feature "Hijr Calendar"     No     Some     Some       Outgoing Mail     Password Policy     Some     Some     Some       Reminders     Sayetin Magration     Yes     Some     Some       Vue External Links     Ves     Some     Some     Some	Advisor Portal	LOCK TIME ENGIES 😈	Activate.	N0 •		Save	
Default Values B (H) Sore   Default Values Business Uay Equals 5 (D) Sore   DecuSign Integration Alow feature clients management Yes Sore   emSigner Integration Show Advanced Menu Items ? Yes Sore   External Links Export Filters Yes Sore   Document Content Search Visualize Hijfl Calendar ? No Sore   Maker Checker Control Alow feature "Hijfl Calendar ? No Sore   Menu External Links Alow feature "Hijfl Calendar ? No Sore   Password Policy Reminders Sore Sore   Syen Integration Ves Sore Sore   VAE Pass Integration Ves Sore Sore	Contract/Document Default Values		Starting from:	01/09/2024	Ċ		
Delegation Business Week Equals 5 D) Sove   DocuSign Integration Allow feature clents management Yes Sove   External Links Show Advanced Menu Items • Yes Sove   Hearing Verification Process Export Filters Yes Sove   Document Content Search Visualize Hiji Calendar Converter No •   Maker Checker Control Allow feature "Hiji Calendar" • No •   Menu External Links Allow feature "Hiji Calendar" • No •   Outgaing Mail Allow feature "Stay Signed In" Yes •   Password Policy Reminders Save Save   Sysen Integration Visualize Hiji Calendar • Save •   VAE Pass Integration Visualize Hiji Calendar • Yes •	Client Portal	Business Day Equals	8	(H)		Save	
Delegation     Image: Comparison     Image: Comparison <td>Default Values</td> <td>Rusines Week Equals</td> <td></td> <td></td> <td></td> <td></td> <td></td>	Default Values	Rusines Week Equals					
emSigner Integration Show Advanced Menu Items I   External Links   Hearing Verification Process   Document Content Search   Visualize Hijri Calendar Converter   No   Maker Checker Control   Menu External Links   Notifications   Outgoing Mail   Password Policy   Reminders   Sayen Integration   UAE Pass Integration   UAE Pass Integration	Delegation	Duaneaa week Lyubia	5	[D]		Save	L
Show Advanced Menu Items     Image: Some	DocuSign Integration	Allow feature clients management	Yes	•		Save	L
External Links Export Filters Swee   Document Content Search Visualize Hijri Calendar Converter Save   Maker Checker Control Allow feature "Hijri Calendar" • No   Allow feature "Stay Signed In" Yes Save   Outgoing Mail Yes Save   Password Policy Reminders   Sayen Integration Save   UAE Pass Integration Visualize Hijri Calendar Converter	emSigner Integration	Show Advanced Menu Items 😗	Yes			Save	L
Implementation Process     Implementation Process       Document Content Search     Visualize Hijri Calendar Converter       Maker Checker Control     No       Menu External Links     Allow feature "Hijri Calendar"       Allow feature "Hijri Calendar"     No       Outgoing Mail       Password Policy       Reminders       Sayen Integration       Web Hoos	External Links						L
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Allow feature "Hijri Calendar" ?     No     No       Notifications     Allow feature "Stay Signed In"     Yes     Save       Outgoing Mail       Password Policy       Reminders       Sayen Integration       VLR Pass Integration       Web Hool	Document Content Search	Visualize Hijri Calendar Converter	No	<b>*</b>		Save	
Menu External Links     Allow feature "Stay Signed In"     Yes       Outgoing Mail       Password Policy       Reminders       Sayen Integration       VALP Pass Integration       Web Hooks	Maker Checker Control	Allow feature "Hijri Calendar"	No			Save	
Outgoing Mail       Password Policy       Reminders       Sayen Integration       System Values       UAE Pass Integration       Web Hooks	Menu External Links						
Password Policy Reminders Sayen Integration UAE Pass Integration Web Hods	Notifications	Allow feature "Stay Signed In"	Yes	T		Save	-
Reminders Sayen Integration UAE Pass Integration Web Hoos	Outgoing Mail						
Sayen Integration System Values UAE Pass Integration Web Hools	Password Policy						
System Values UAE Pass Integration Web Hoos	Reminders						
UAE Pass Integration Web Hooks	Sayen Integration						
Web Hooks							
San Al	Web Hooks						
	Save All						2

Once enabled, you'll have the option to choose the filter directly when hovering over the matters from the navigation menu.

Similarly, you can manage filters for Litigation Cases and Intellectual Properties at their respective levels.

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

Thank you!