How to Manage Corporate Matters
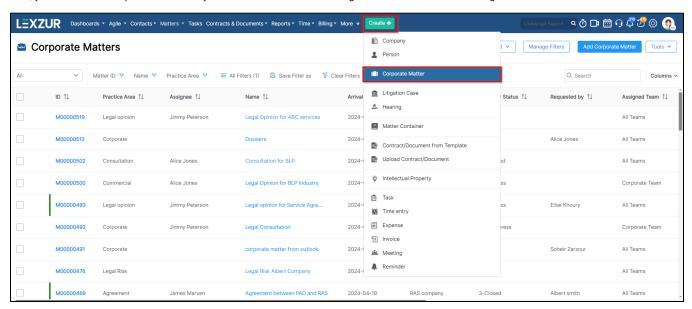
Objectives

- Insert a new Corporate Matter
- Seach for Matters and Filter the Grid
- Capture and manage a Corporate Matter's details

Steps

In LEXZUR you can efficiently manage Corporate Matters at every stage in a smart and agile central software workspace, where users can collaborate with internal and external stakeholders, keep track of legal deadlines, automate reminders, and sent as emails or notifications.
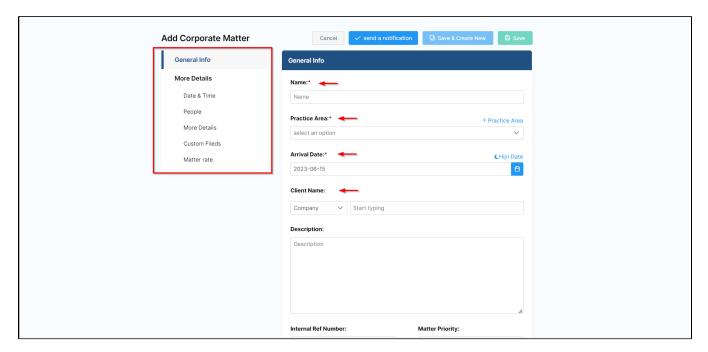
First, you have to add Corporate Matters to your database. You do that through the **Create** button in the navigation menu.
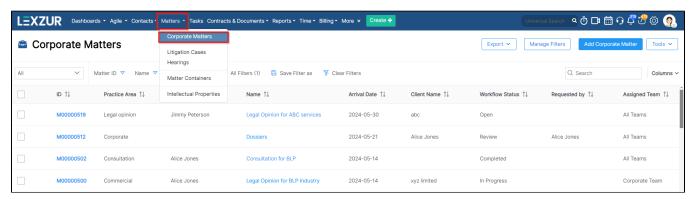

There are some fields that need to be filled out, such as the:

- **Matter Name**
- **Practice Area**
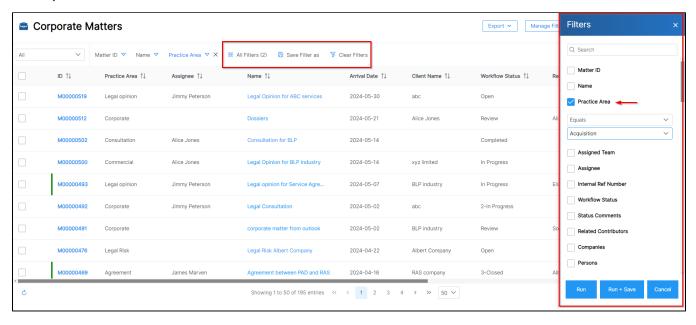- **Arrival Date**
- **Client Name**

In addition to some information such as due date, assignee user, matter rate, or custom fields.

You can now track and manage all your corporate matters from one grid. From the **Matters** tab choose **Corporate Matters.**
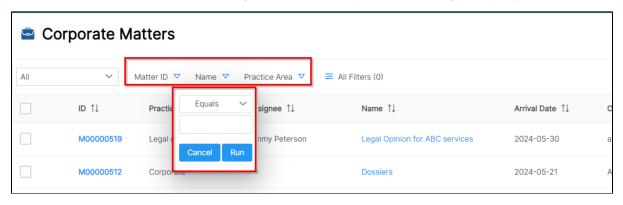

Start by using the advanced filters to search for a specific Corporate Matter based on your chosen criteria. Open the "All Filters" section and select the necessary criteria.
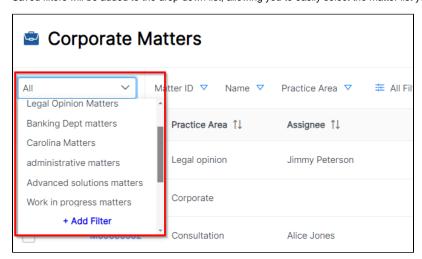
For example, you can search for Corporate Matters by practice area, assignee, client name, and more. You can also save filters from the grid as a new matter list page and clear filters with a single click.

There are three filters available for direct use on the grid: matter ID, name, or practice area, enabling you to quickly find matters.

Saved filters will be added to the drop-down list, allowing you to easily select the matter list you wish to view.
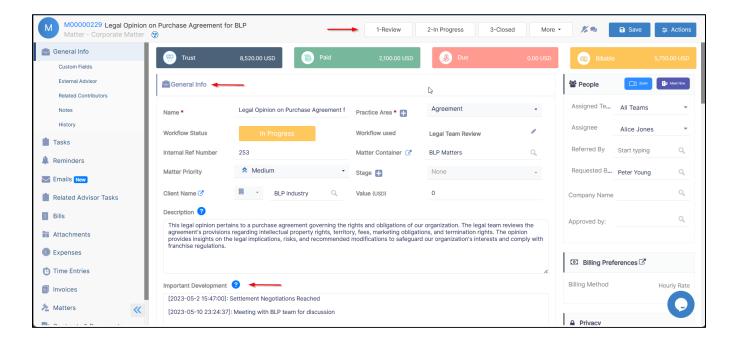

In the top right corner of the page, you can export your results to an Excel sheet. You can also manage filters, add new matters, and use tools to archive and change assignees.
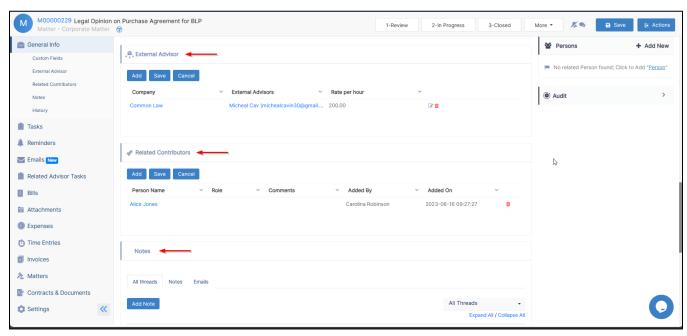

Now, to go further with additional modifications, click on the Matter's name or ID to open its page.

The General Info Tab allows you to add details or modify existing information, update workflow statuses, and record any important developments or updates.
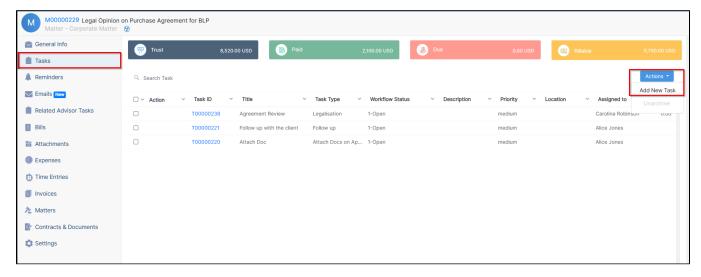
For efficient collaboration, you can outsource this matter to external Legal Practitioners, and mention the contributors working on the matter if any.
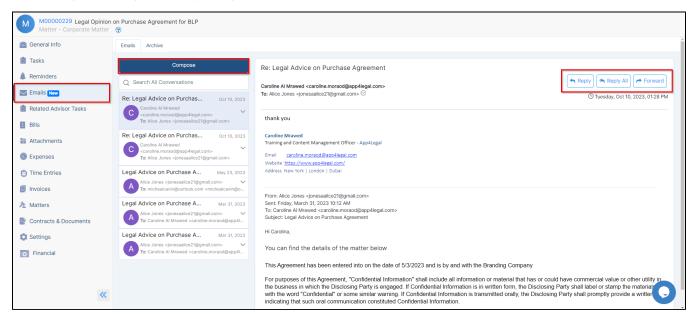

In addition, take note of all the noteworthy updates related to this matter. You can also log emails with attachments as matter notes using Outlook or Gmail Connect.
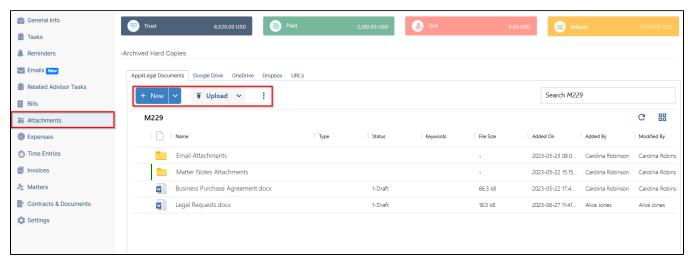
Assign tasks and set reminders to your team when several people are working in parallel on the same matter. You can then track all the associated tasks and reminders within the current matter, along with all their details.
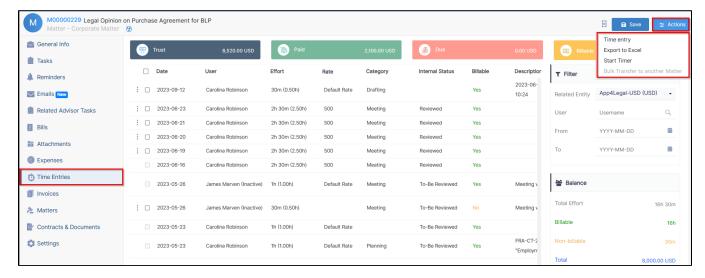
Furthermore, you can send your matter updates by email and track all the related email conversations.
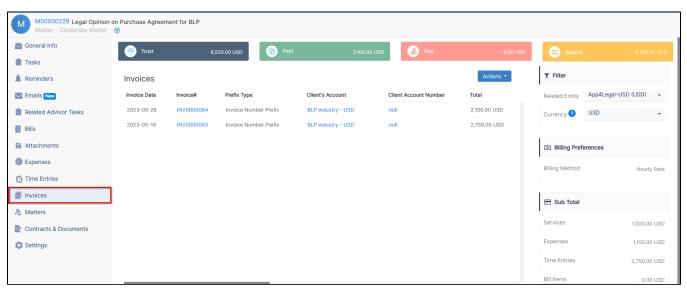

The Attachments Tab lets you organize folder structures and upload and manage documents related to this matter.

In addition, record expenses and time logs, so you can determine what to invoice later.

Moreover, you can check all the invoices related to this matter from the **Invoices** tab.

Last but not least, you can link a Matter to an existing Matter or Contract in LEXZUR. You can also adjust the users' rates, matter rate, capping, partners' percentage, and the billing preferences of this Corporate Matter from the Settings tab.

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

Thank you!