

How to Manage Corporate Matters

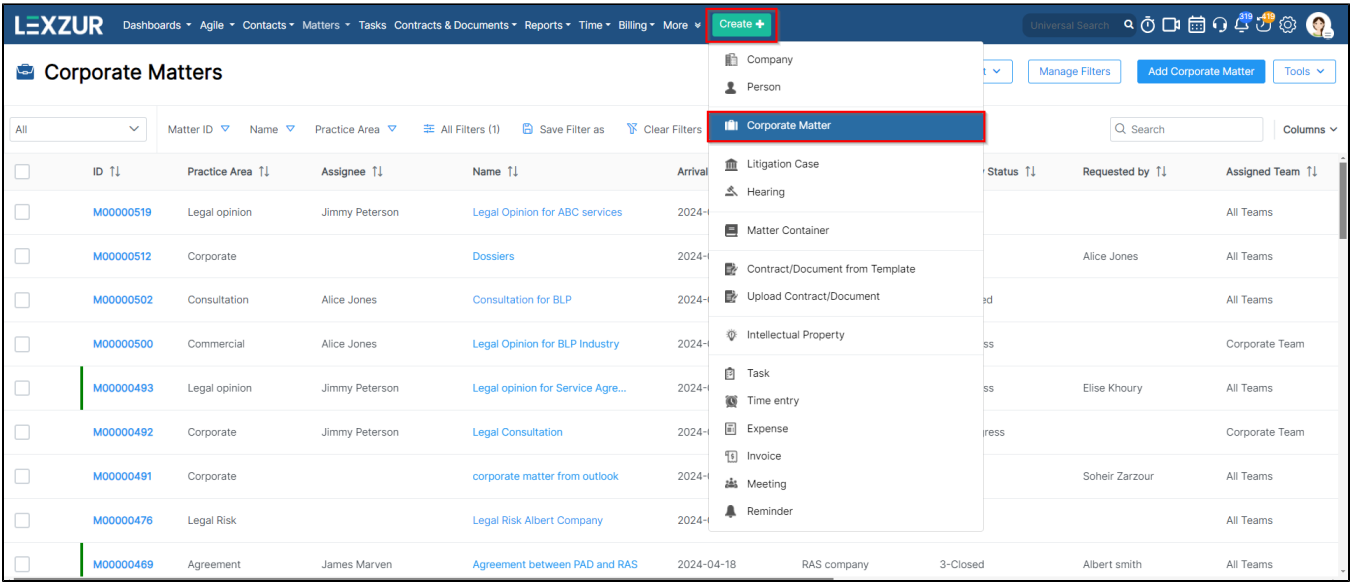
Objectives

- Insert a new Corporate Matter
- Search 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.

Add Corporate Matter

General Info

More Details

Date & Time

People

More Details

Custom Fileds

Matter rate

Cancel

✓ send a notification

Save & Create New

Save

General Info

Name: *

Name

Practice Area: *

select an option

+ Practice Area

Arrival Date: *

2023-06-15

Hijri Date

Client Name: *

Company

Start typing

Description:

Description

Internal Ref Number:

Matter Priority:

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

LEXZUR

Dashboards
Agile
Contacts
Matters
Tasks
Contracts & Documents
Reports
Time
Billing
More
Create

Universal Search

Corporate Matters

Export

Manage Filters

Add Corporate Matter

Tools

All	Matter ID	Name	Practice Area	Name	Arrival Date	Client Name	Workflow Status	Requested by	Assigned Team
<input type="checkbox"/>	M00000519	Legal opinion	Jimmy Peterson	Legal Opinion for ABC services	2024-05-30	abc	Open		All Teams
<input type="checkbox"/>	M00000512	Corporate		Dossiers	2024-05-21	Alice Jones	Review	Alice Jones	All Teams
<input type="checkbox"/>	M00000502	Consultation	Alice Jones	Consultation for BLP	2024-05-14		Completed		All Teams
<input type="checkbox"/>	M00000500	Commercial	Alice Jones	Legal Opinion for BLP Industry	2024-05-14	xyz limited	In Progress		Corporate Team

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.

Corporate Matters

Export

Manage Filters

All

Matter ID

Name

Practice Area

All Filters (2)

Save Filter as

Clear Filters

ID	Practice Area	Assignee	Name	Arrival Date	Client Name	Workflow Status	Requested by	Assigned Team
M00000519	Legal opinion	Jimmy Peterson	Legal Opinion for ABC services	2024-05-30	abc	Open		All Teams
M00000512	Corporate		Dossiers	2024-05-21	Alice Jones	Review	Alice Jones	All Teams
M00000502	Consultation	Alice Jones	Consultation for BLP	2024-05-14		Completed		All Teams
M00000500	Commercial	Alice Jones	Legal Opinion for BLP Industry	2024-05-14	xyz limited	In Progress		Corporate Team
M00000493	Legal opinion	Jimmy Peterson	Legal opinion for Service Agre...	2024-05-07	BLP industry	In Progress		Corporate Team
M00000492	Corporate	Jimmy Peterson	Legal Consultation	2024-05-02	abc	2-In Progress		All Teams
M00000491	Corporate		corporate matter from outlook	2024-05-02	BLP industry	Review		Corporate Team
M00000476	Legal Risk		Legal Risk Albert Company	2024-04-22	Albert Company	Open		All Teams
M00000469	Agreement	James Marvin	Agreement between PAD and RAS	2024-04-18	RAS company	3-Closed		All Teams

Filters

Search

☐ Matter ID
☐ Name
☒ Practice Area
☐ Assigned Team
☐ Assignee
☐ Internal Ref Number
☐ Workflow Status
☐ Status Comments
☐ Related Contributors
☐ Companies
☐ Persons

Equals

Acquisition

Run

Run + Save

Cancel

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.

Corporate Matters

All

Matter ID

Name

Practice Area

All Filters (0)

<input type="checkbox"/>	ID ↑↓	Practice Area ↑↓	Assignee ↑↓	Name ↑↓	Arrival Date ↑↓	
<input type="checkbox"/>	M00000519	Legal opinion	Jimmy Peterson	Legal Opinion for ABC services	2024-05-30	
<input type="checkbox"/>	M00000512	Corporate		Dossiers	2024-05-21	

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

Corporate Matters

All

Matter ID

Name

Practice Area

All Filters (0)

<input type="checkbox"/>	ID ↑↓	Practice Area ↑↓	Assignee ↑↓	Name ↑↓	Arrival Date ↑↓	
<input type="checkbox"/>	M00000519	Legal opinion	Jimmy Peterson	Legal Opinion for ABC services	2024-05-30	
<input type="checkbox"/>	M00000512	Corporate		Dossiers	2024-05-21	

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.

Corporate Matters

All

Matter ID

Name

Practice Area

All Filters (0)

<input type="checkbox"/>	ID ↑↓	Practice Area ↑↓	Assignee ↑↓	Name ↑↓	Arrival Date ↑↓	Client Name ↑↓	Workflow Status ↑↓	Requested by ↑↓	Assigned Team ↑↓
<input checked="" type="checkbox"/>	M00000519	Legal opinion	Jimmy Peterson	Legal Opinion for ABC services	2024-05-30	abc	Open		All Teams
<input type="checkbox"/>	M00000512	Corporate		Dossiers	2024-05-21	Alice Jones	Review	Alice Jones	All Teams

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.

M00000229 Legal Opinion on Purchase Agreement for BLP
Matter - Corporate Matter

1-Review 2-In Progress 3-Closed More Save Actions

General Info

Trust 8,520.00 USD Paid 2,100.00 USD Due 0.00 USD Billable 5,750.00 USD

General Info

Name Legal Opinion on Purchase Agreement f Practice Area Agreement

Workflow Status In Progress Workflow used Legal Team Review

Internal Ref Number 253 Matter Container BLP Matters

Matter Priority Medium Stage None

Client Name BLP Industry Value (USD) 0

Description

This legal opinion pertains to a purchase agreement governing the rights and obligations of our organization. The legal team reviews the agreement's provisions regarding intellectual property rights, territory, fees, marketing obligations, and termination rights. The opinion provides insights on the legal implications, risks, and recommended modifications to safeguard our organization's interests and comply with franchise regulations.

Important Development

[2023-05-2 15:47:00]: Settlement Negotiations Reached

[2023-05-10 23:24:37]: Meeting with BLP team for discussion

People

Assigned To... All Teams

Assignee Alice Jones

Referred By Start typing

Requested B... Peter Young

Company Name

Approved by:

Billing Preferences

Billing Method Hourly Rate

Privacy

For efficient collaboration, you can outsource this matter to external Legal Practitioners, and mention the contributors working on the matter if any.

M00000229 Legal Opinion on Purchase Agreement for BLP
Matter - Corporate Matter

1-Review 2-In Progress 3-Closed More Save Actions

General Info

Custom Fields

External Advisor

Related Contributors

Notes

History

Tasks

Reminders

Emails New

Related Advisor Tasks

Bills

Attachments

Expenses

Time Entries

Invoices

Matters

Contracts & Documents

Settings

External Advisor

Add Save Cancel

Company External Advisors Rate per hour

Common Law Micheal Cav (michealcavin30@gmail... 200.00

Related Contributors

Add Save Cancel

Person Name Role Comments Added By Added On

Alice Jones Carolina Robinson 2023-06-16 09:27:27

Notes

All threads Notes Emails

Add Note

All Threads Expand All / Collapse All

Persons + Add New

No related Person found; Click to Add "Person"

Audit

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.

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M00000229 Legal Opinion on Purchase Agreement for BLP

Matter - Corporate Matter

Trust

8,520.00 USD

Paid

2,100.00 USD

Due

0.00 USD

Billable

5,750.00 USD

Time entry

Export to Excel

Start Timer

Bulk Transfer to another Matter

Filter

Related Entity

App4Legal-USD (USD)

User

Username

From

YYYY-MM-DD

To

YYYY-MM-DD

Balance

Total Effort

16h 30m

Billable

16h

Non-billable

30m

Total

8,000.00 USD

General Info

Tasks

Reminders

Emails New

Related Advisor Tasks

Bills

Attachments

Expenses

Time Entries

Invoices

Matters

Contracts & Documents

Settings

Date	User	Effort	Rate	Category	Internal Status	Billable	Description
2023-09-12	Carolina Robinson	30m (0.50h)	Default Rate	Drafting	Reviewed	Yes	2023-06-10:24
2023-06-23	Carolina Robinson	2h 30m (2.50h)	500	Meeting	Reviewed	Yes	
2023-06-21	Carolina Robinson	2h 30m (2.50h)	500	Meeting	Reviewed	Yes	
2023-06-20	Carolina Robinson	2h 30m (2.50h)	500	Meeting	Reviewed	Yes	
2023-06-19	Carolina Robinson	2h 30m (2.50h)	500	Meeting	Reviewed	Yes	
2023-06-16	Carolina Robinson	2h 30m (2.50h)	500	Meeting	Reviewed	Yes	
2023-05-26	James Marven (Inactive)	1h (1.00h)	Default Rate	Meeting	To-Be Reviewed	Yes	Meeting v
2023-05-26	James Marven (Inactive)	30m (0.50h)		Meeting	To-Be Reviewed	No	Meeting v
2023-05-23	Carolina Robinson	1h (1.00h)	Default Rate		To-Be Reviewed	Yes	
2023-05-23	Carolina Robinson	1h (1.00h)	Default Rate	Planning	To-Be Reviewed	Yes	FRA-CT-2 *Employ

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

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M00000229 Legal Opinion on Purchase Agreement for BLP

Matter - Corporate Matter

Trust

8,520.00 USD

Paid

2,100.00 USD

Due

0.00 USD

Billable

5,750.00 USD

Filter

Related Entity

App4Legal-USD (USD)

Currency

USD

Billing Preferences

Billing Method

Hourly Rate

Sub Total

Services

1,000.00 USD

Expenses

1,100.00 USD

Time Entries

2,750.00 USD

Bill Items

0.00 USD

General Info

Tasks

Reminders

Emails New

Related Advisor Tasks

Bills

Attachments

Expenses

Time Entries

Invoices

Matters

Contracts & Documents

Settings

Invoices

Invoice Date

Invoice#

Prefix Type

Client's Account

Client Account Number

Total

2023-05-26	INV0000084	Invoice Number Prefix	BLP Industry - USD	null	2,100.00 USD
2023-05-19	INV0000083	Invoice Number Prefix	BLP Industry - USD	null	2,750.00 USD

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!