

# How to Manage Companies in Lexzur

## Objectives

- Add a new company
- Correct/Revise/Update data related to an existing company
- Capture and manage a company's details

## Steps

In LEXZUR, you can easily and efficiently manage your companies. First, you have to add companies to your database. You do that quickly from the **Create** button in the main menu or from the companies grid by clicking on the **+** sign on the top right side of the screen.

LEXZUR

Dashboards

Agile

Contacts

Matters

Tasks

Contracts & Documents

Reports

Time

Billing

More

Create +

Universal Search

630

268

Companies

All Companies

Save Filter

Search

ID

Name

Nickname

Category

Sub-category

Search Filters

COM00000071

abc

abc

Client

COM00000091

ABC Services

... ABC Services

Partner

Star-up

COM00000038

Advanced Industries

... AdI

Client

Industrial

COM00000012

Advanced Solutions

AdS

Client

Documenter

COM00000102

Agency Grid

AG

Opponent

COM00000073

Al Kamal Industries

K Industries

Opponent

COM00000107

al waha

al waha

Opponent

COM00000125

Albert Company

Albert Company

Client

COM00000101

Albert Insurance Company

Albert IC

Client

COM00000054

Alvah Agency

A Agency

Client

COM00000078

Astra Digital Holding

Astra Digital

Internal

COM00000068

Back Boss company

BBC

Client

COM00000037

Back-Line Company

BLcompany

Client

Civil

United States

Capital

Capital Currency

Registration Nb

15,750,000

AED

null

100,000

USD

45-693257

200,000

USD

0

0

100,000

0

0

0

10,000

AED

0

Company

Person

Corporate Matter

Litigation Case

Hearing

Matter Container

Contract/Document from Template

Upload Contract/Document

Intellectual Property

Task

Time entry

Expense

Invoice

Meeting

Reminder

+

Columns

There are 3 required fields:

**Name:** Full legal name of the company

**Nickname:** That's easier to catch

**Category:** The relationship between this Company and the Law Firm/Legal Department. A standard list of values is available, including Client, Opponent, Partner, and so on.

## New Company

Name\*

Nickname\*

Category\*

Choose Person / Company Category

Website

Email

Use semicolons separator (;) to add multiple emails: for ex.  
john@gmail.com;john@live.com

Address

Company Details

Document

Shared With ( Public )

Set as Private

Save

Save and Create Another

Cancel

Other fields are optional; however, you can fill out these fields to make it easier to generate reports at a later stage. Optional fields include Sub-Category, Company legal type, Company group, Address, and company contact information, etc.

Now you have added your companies, and you can now manage all the related information. You can start by using advanced filters to help you search for companies based on your chosen criteria. You have the option to create your filter and save it for later use. For example, you can search for companies that are located in the United States.



You can also create and manage the Folder structure and Upload Documents through the Attachments Tab.

Furthermore, a user can record a company's assets, set reminders, view the ownership percentages through the tree view tab, and set bank accounts related to this company.

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

Thank you!