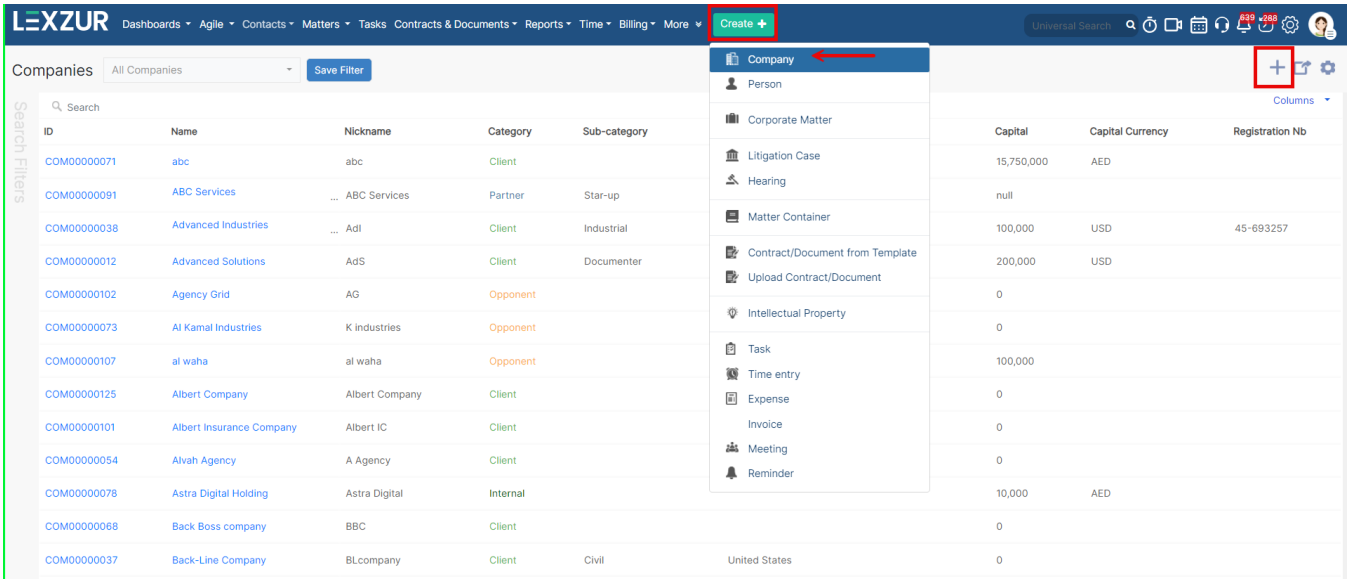
How to Manage Companies in Lexzur

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.

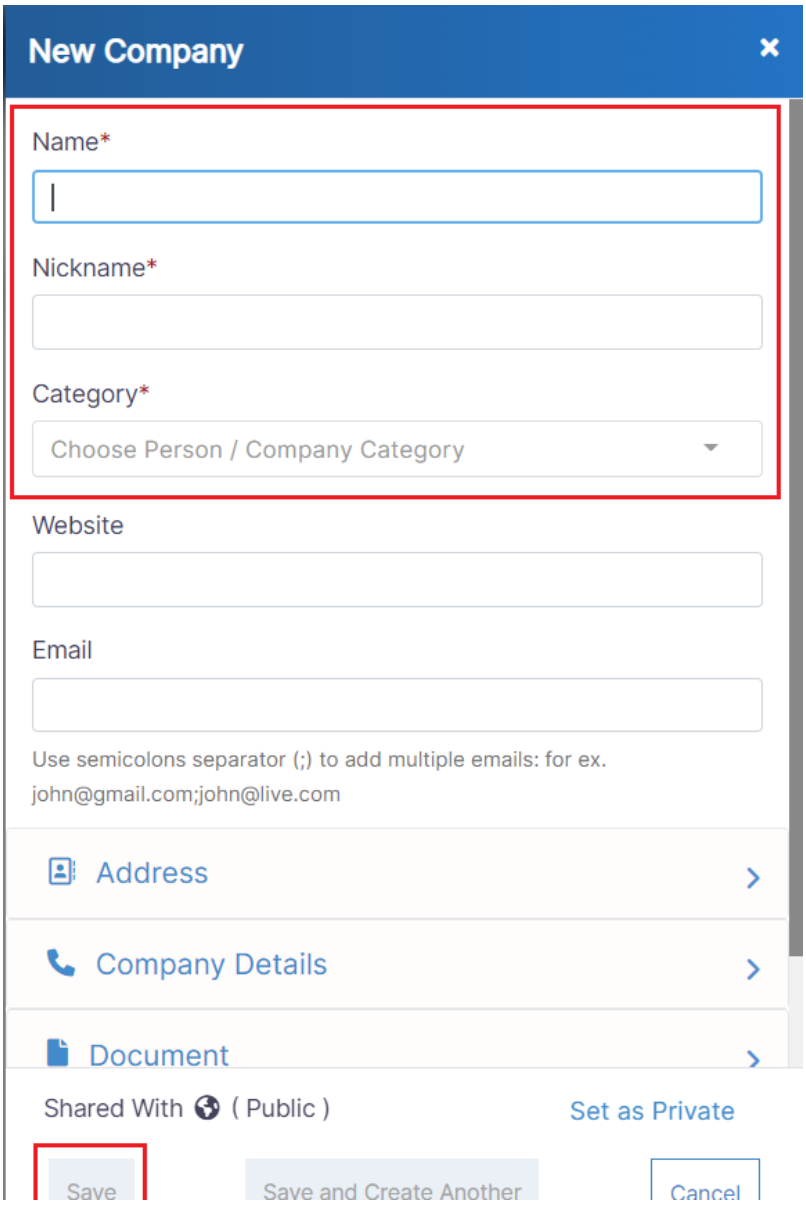


There are 3 required fields:

Name: Full legal name of the company

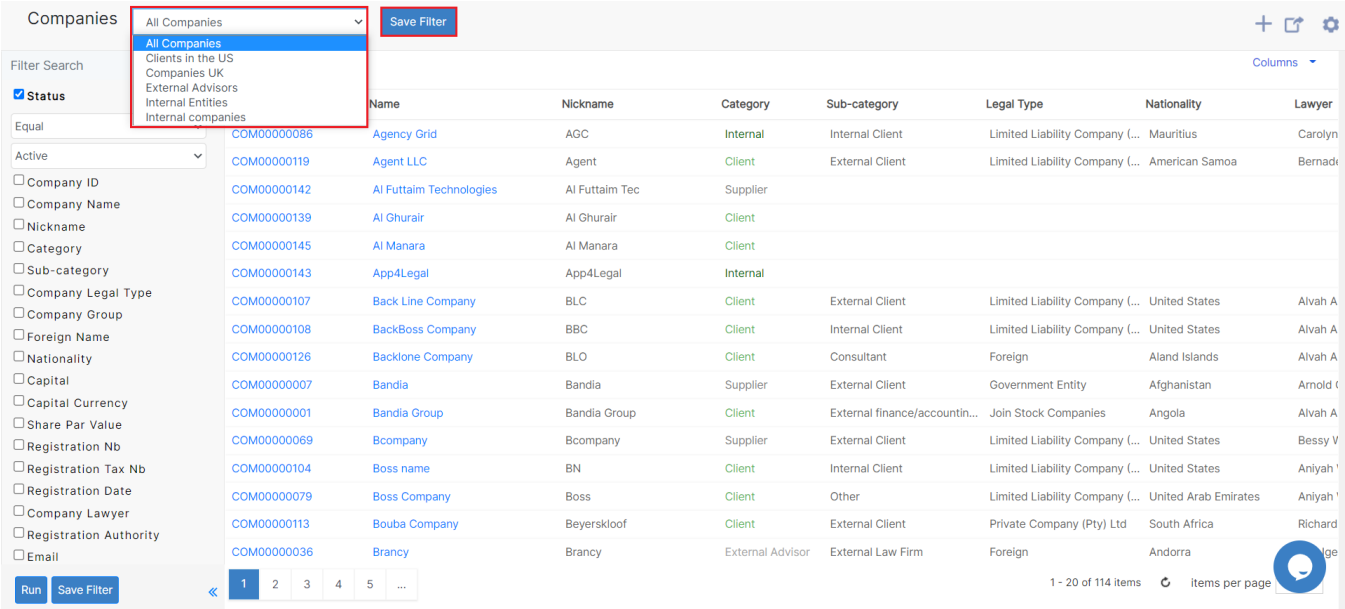
Nickname: That's easier to catch

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.

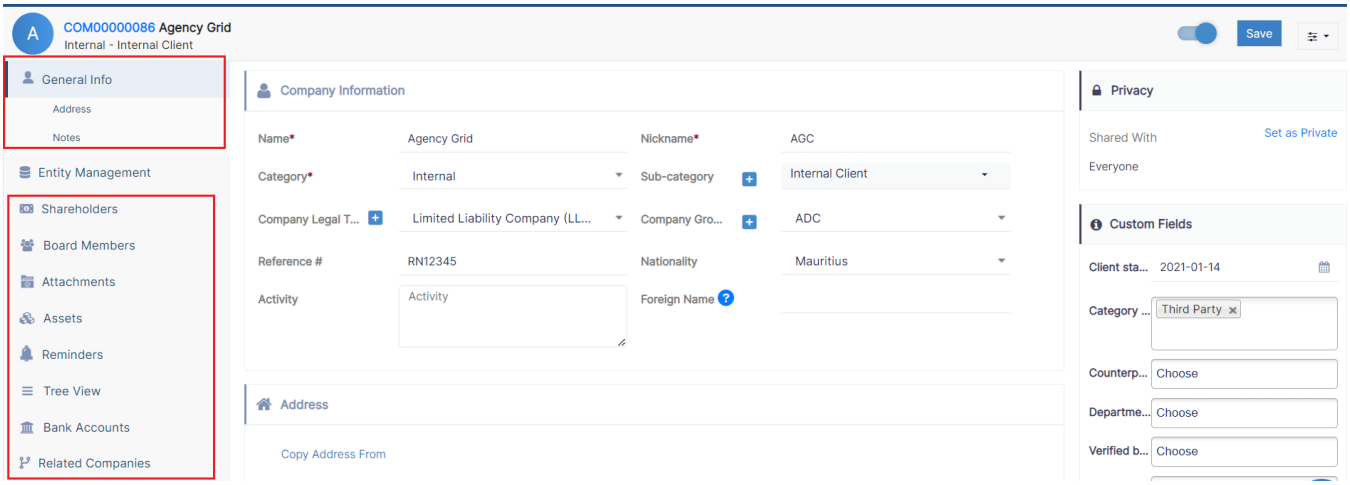


Other fields are optional; however, you can fill out these fields to make it easier to generate reports at a later stage. Optional fields include Sub-Category, Company legal type, Company group, Address, and company contact information, etc.

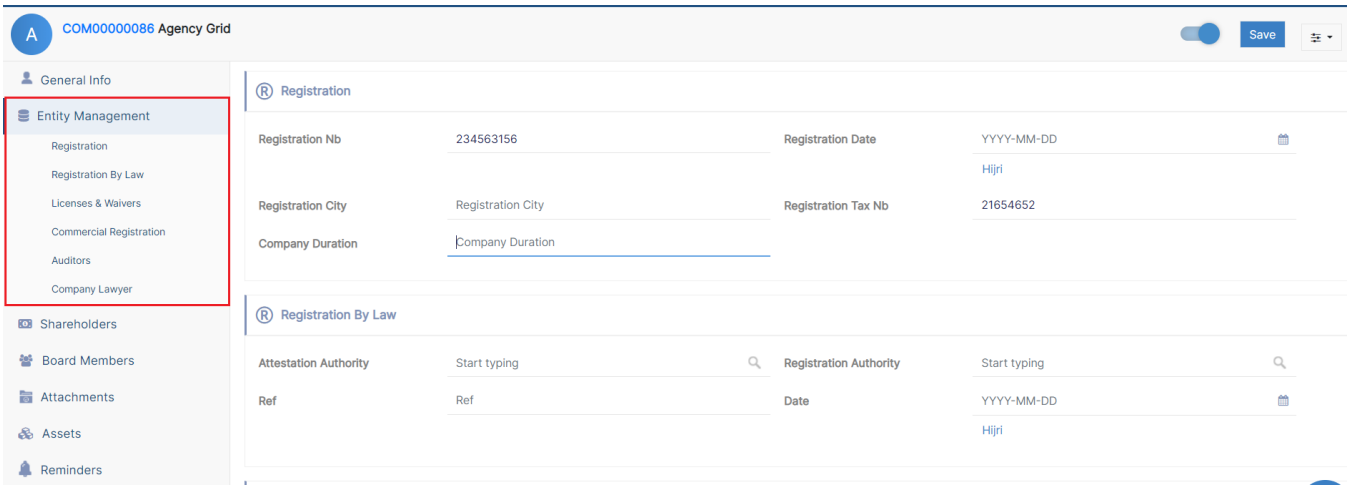
Now you have added your companies, and you can now manage all the related information.
You can start by using advanced filters to help you search for companies based on your chosen criteria. You have the option to create your filter and save it for later use. For example, you can search for companies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



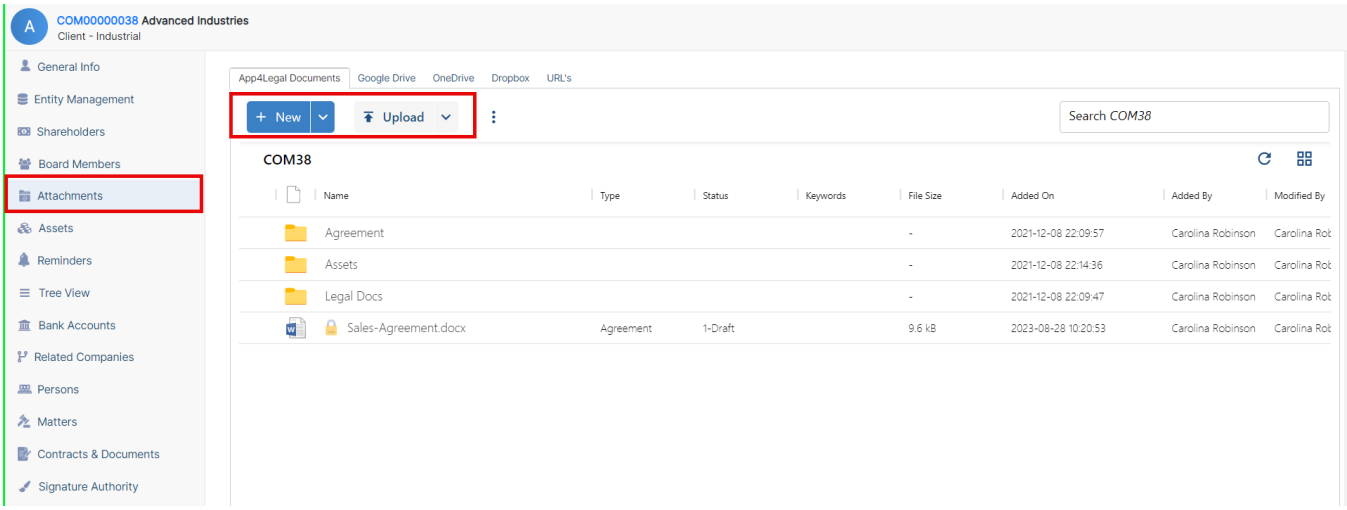
For further modifications, click on the Company name or Company ID to open its page. You can manage General Information such as adding or updating the company's basic information, company address, and notes. You can also manage information related to shareholders, including (Capital, Shares, Reports) and Board members' information, Documents, Assets, Bank Accounts, and related companies.



Moreover, you can manage the entity through the information related to the company registration details, registration by law, licenses & waivers, commercial registration, auditors, and company lawyers.



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.

Last but not least, you can link a company to existing companies, persons, matters, or contracts in Lexzur, you can keep track of who has the authority to sign on behalf of the Company for official documents, and customize the company view page as needed.

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

Thank you!