

How to Integrate LEXZUR with Cloud Document Management Solutions

Objectives

- [Get Google Drive, Dropbox, One Drive, or SharePoint Apps.](#)
- [Manage Apps](#)
- [Understand how to Manage and Track Documents in LEXZUR 360 Docs.](#)

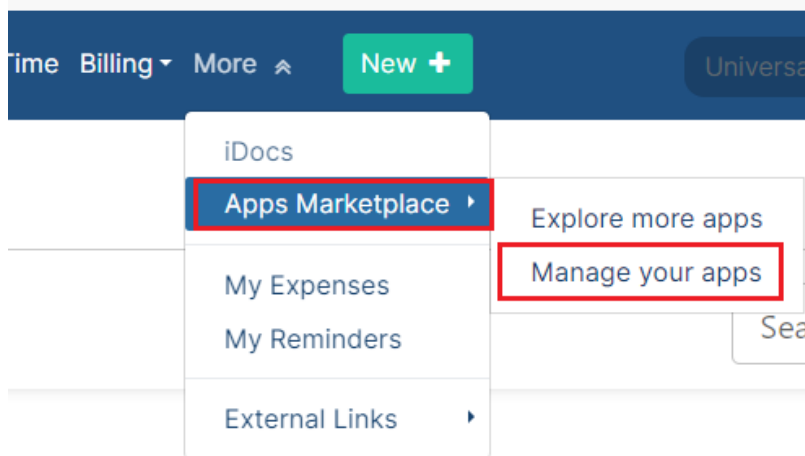
Steps

In LEXZUR, Legal practitioners can have a single source for all their shared documents and files on virtually any cloud document management solution, in a central, user-friendly, and secure repository.

With LEXZUR 360 Docs, users can now integrate their LEXZUR instance with Google Drive, One Drive, Dropbox, and SharePoint.

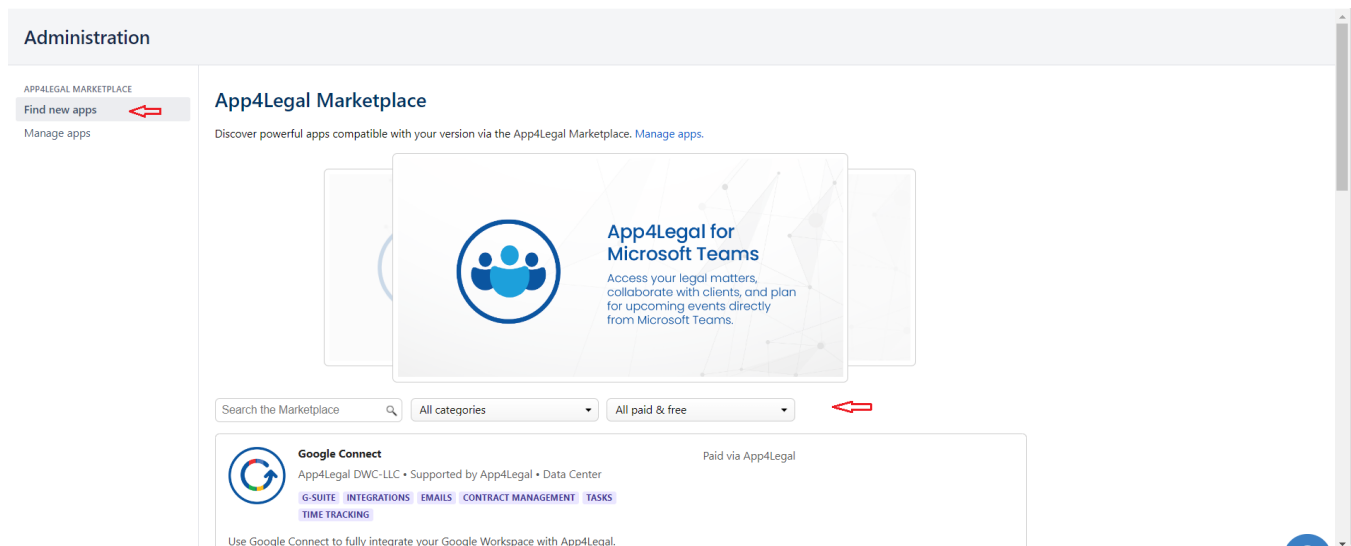
First, these integrations should be installed from **LEXZUR Marketplace**.

From the **More** options in the main menu, choose **Apps Marketplace**, where you can explore and manage your apps in LEXZUR.








• Get Apps:

The Find new apps page allows you to search for the App you want, and categorize them.




Choose the app you need, for example, Google Drive, and press **Get now**

	360 Docs App4Legal DWC-LLC • Supported by App4Legal • Data Center INTEGRATIONS DOCUMENT MANAGEMENT Use App4Legal 360 Docs to integrate App4Legal with virtually any cloud document management solution.	Free	Manage
	Google Drive App4Legal DWC-LLC • Supported by App4Legal • Data Center DOCUMENT MANAGEMENT INTEGRATIONS Use the Google Drive App to Connect your App4Legal Instance to your Google Drive account.	Free	Get now
	SharePoint App4Legal DWC-LLC • Supported by App4Legal • Data Center DOCUMENT MANAGEMENT INTEGRATIONS Use the SharePoint App to Connect your App4Legal Instance to your SharePoint account.	Free	Manage
	OneDrive App4Legal DWC-LLC • Supported by App4Legal • Data Center DOCUMENT MANAGEMENT INTEGRATIONS Use this application to integrate your OneDrive account with App4Legal Software.	Free	Manage
	Dropbox App4Legal DWC-LLC • Supported by App4Legal • Data Center DOCUMENT MANAGEMENT INTEGRATIONS Use the Dropbox App to access your Dropbox, directly through App4Legal.	Free	Manage

- **Manage apps:**

Managing your apps include: **Uninstall** or **Configure**

 **OneDrive**

UP-TO-DATE

[Update](#)

Use this application to integrate your OneDrive account with App4Legal Software.

Why update to v. 1.0.0 ?

Version 1.0.0 includes improvements, fixes, and features.

[Read release notes for v. 1.0.0](#)

[Uninstall](#) [Configure](#)


	Installed version: Available version: 1.0.0 Vendor: App4Legal Support: Supported by App4Legal App key: OneDrive	Documentation Support and issues Store
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You can disable or uninstall any app easily and at any time.

 The **Configure** button will direct you to the suitable configuration page

You can set the app you want as a default app which means that the selected app will be placed in the first tab in your documents page.


This can be done from the **Integrations** in the **System Preferences Settings**.



Google Drive

Our Google Drive integration is a part of the Cloud Storage & Documents. You need a Google Drive account to access your files in Google Drive in order to manage your files in App4Legal.


Set as Default ☒ ?



SharePoint

Our SharePoint integration is a part of the Cloud Storage & Documents. You need a SharePoint account to access your files in SharePoint in order to manage your files in App4Legal.


Set as Default ☐ ?



OneDrive

Our OneDrive integration is a part of the Cloud Storage & Documents. You need a OneDrive account to access your files in OneDrive in order to manage your files in App4Legal.

Set as Default ☐ ?



Dropbox

Our Dropbox integration is a part of the Cloud Storage & Documents. You need a Dropbox account to access your files in Dropbox in order to manage your files in App4Legal.

Set as Default ☐ ?

Once enabled, users can access all the LEXZUR 360 Docs integrations, and switch easily between them from wherever documents can be accessed in LEXZUR.

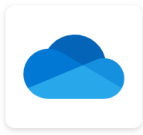
The first time you access these integrations, you will be asked to sign in with your accounts.

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Matter - Corporate Matter

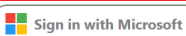
- General Info
- Tasks
- Reminders
- Emails New
- Bills
- Attachments**
- Expenses
- Time Entries
- Matters
- Contracts & Documents
- Settings

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App4Legal Documents
Google Drive
SharePoint
OneDrive
Dropbox
URL's



Please sign in to Microsoft



You can do so from the IDocs module or the Attachments tab available in any module by simply heading to the document storage needed.

LEXZUR
Dashboards ▾ Agile ▾ Contacts ▾ Matters ▾ Tasks ▾ Contracts & Documents ▾ A.I. ▾ Reports ▾ Time ▾ Billing ▾
More ▾
Create +

Universal Search 🔍
📅
🔔 17
⚙️ 16

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iDocs ←

Apps Marketplace ▾

My Expenses

My Reminders

External Links ▾

	Name	Type	Status	Keywords	File Size	Added On	Added By	Modified By	Modified on
	Contract Templates				-	2021-11-03 13:15:21	Carolina Robinson	Carolina Robinson	2022-06-01 11:39...
	Document Generator				-	2023-03-03 19:15...	Alice Jones	Alice Jones	2023-03-03 17:15...
	Documents			Agreements	-	2022-02-01 12:33...	Sam Marvin	Carolina Robinson	2023-03-03 14:31...
	Hearing Templates				-	2021-12-30 16:09...	Carolina Robinson	Carolina Robinson	2021-12-30 16:09...
	Supporting Documents				-	2023-07-20 08:3...	Carolina Robinson	Carolina Robinson	2023-07-20 09:3...
	Templates				-	2021-11-30 16:14:21	Carolina Robinson	Carolina Robinson	2023-08-16 10:11...
	Document in AR.docx				94.5 kB	2023-08-18 15:07...	James Marvin	Katrina diab	2023-12-05 11:12...
	POA Lauren20231204130300.docx				17.1 kB	2023-12-04 13:05...	Maria Dave	Maria Dave	2023-12-04 13:05...

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General Info | Tasks | Reminders | Emails **New** | Bills | **Attachments** | Expenses | Time Entries | Matters | Contracts & Documents

Trust 0.00 USD | Paid 0.00 USD | Due 0.00 USD | Billable 5,000.00 USD

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+ New | Upload | Search M150

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Name	Type	Status	Keywords	File Size	Added On	Added By

Each integration in LEXZUR 360 Docs uses the same folder structure as the platform it's used with. Therefore, when users click on the "One Drive Tab", for example, the files and folders are displayed exactly as they would be in OneDrive. And that's true for every integration.

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+ New | Upload

OneDrive > My files > **Matters**

Name	File Size	Modified ↑	Sharing	Linking
Advanced Industries	44.5 kB	23/06/2022 1:18 pm	Private	
Purchase Agreement.docx	38.8 kB	Many seconds ago	Private	

Users are also able to take quick actions and make changes to their files and folders in Google Drive, One Drive, Dropbox, or SharePoint, directly through the LEXZUR Instance.

This includes renaming, uploading, and downloading folders and files...etc.

Users can also save the file as LEXZUR Document and it will appear in the LEXZUR Documents tab.

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Contracts & Documents

Settings

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App4Legal Documents Google Drive SharePoint OneDrive Dropbox URL's

Download Rename Copy Link Save as App4Legal Document Delete

1 Selected

OneDrive > My files > Matters

Name	File Size	Modified ↑	Sharing	Linking
Advanced Industries	44.5 kB	23/06/2022 1:18 pm	Private	
Purchase Agreement.docx	38.8 kB	2 hours ago	Private	

Moreover, LEXZUR 360 Docs are linked to every module. This means users can access their documents on the fly.

Let's say a user is working on a specific matter. They'll be able to view and link all documents in any of their shared folders on these cloud solutions.

 By linking a folder, you will be redirected to the linked folder every time you view your documents. Only Shared folders could be linked.

It can be done by simply clicking on the **Link** button near the needed folder.

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M00000067 Administrative for Advanced Industries

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+ New Upload

Google Drive > Shared With Me > Matters

Name	File Size	Modified ↑	Modified By	Linking
Advanced Industries	-	03/06/2022 10:57 am	Julia Marven	Unlink
Albert Smith	-	03/06/2022 10:58 am	Julia Marven	Link
Modern Structure	-	03/06/2022 10:58 am	Julia Marven	Link
BLP Industries	-	03/06/2022 10:59 am	Julia Marven	Link
Business Department	-	03/06/2022 11:00 am	Julia Marven	Link
David Robinson	-	03/06/2022 11:00 am	Julia Marven	Link
Advanced Solutions	-	09/06/2022 12:47 pm	Alice Jones	Link

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

Thank you!