

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 Filters

Q Search

ID	Name	Nickname	Category	Sub-category
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

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

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

0

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.

Companies

All Companies

All Companies

Clients in the US

Companies UK

External Advisors

Internal Entities

Internal companies

Save Filter

Filter Search

Status

Equal

Active

Company ID

Company Name

Nickname

Category

Sub-category

Company Legal Type

Company Group

Foreign Name

Nationality

Capital

Capital Currency

Share Par Value

Registration Nb

Registration Tax Nb

Registration Date

Company Lawyer

Registration Authority

Email

COM00000086

Agency Grid

AGC

Internal

Internal Client

Limited Liability Company (...)

Mauritius

Carolyn

COM00000119

Agent LLC

Agent

Client

External Client

Limited Liability Company (...)

American Samoa

Bernad

COM00000142

AI Futtaim Technologies

AI Futtaim Tec

Supplier

COM00000139

AI Ghurair

AI Ghurair

Client

COM00000145

AI Manara

AI Manara

Client

COM00000143

App4Legal

App4Legal

Internal

COM00000107

Back Line Company

BLC

Client

External Client

Limited Liability Company (...)

United States

Alvah A

COM00000108

BackBoss Company

BBC

Client

Internal Client

Limited Liability Company (...)

United States

Alvah A

COM00000126

Backlone Company

BLO

Client

Consultant

Foreign

Aland Islands

Alvah A

COM00000007

Bandia

Bandia

Supplier

External Client

Government Entity

Afghanistan

Arnold (

COM00000001

Bandia Group

Bandia Group

Client

External finance/accountin...

Join Stock Companies

Angola

Alvah A

COM00000069

Bcompany

Bcompany

Supplier

External Client

Limited Liability Company (...)

United States

Bessy V

COM00000104

Boss name

BN

Client

Internal Client

Limited Liability Company (...)

United States

Aniyah '

COM00000079

Boss Company

Boss

Client

Other

Limited Liability Company (...)

United Arab Emirates

Aniyah '

COM00000113

Bouba Company

Beyerskloof

Client

External Client

Private Company (Pty) Ltd

South Africa

Richard

COM00000036

Brancy

Brancy

External Advisor

External Law Firm

Foreign

Andorra

ge

Run

Save Filter

1

2

3

4

5

...

1 - 20 of 114 items

Items per page

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.

Thank you!