

How to Link a Person/ Matter/ Contract to a Company

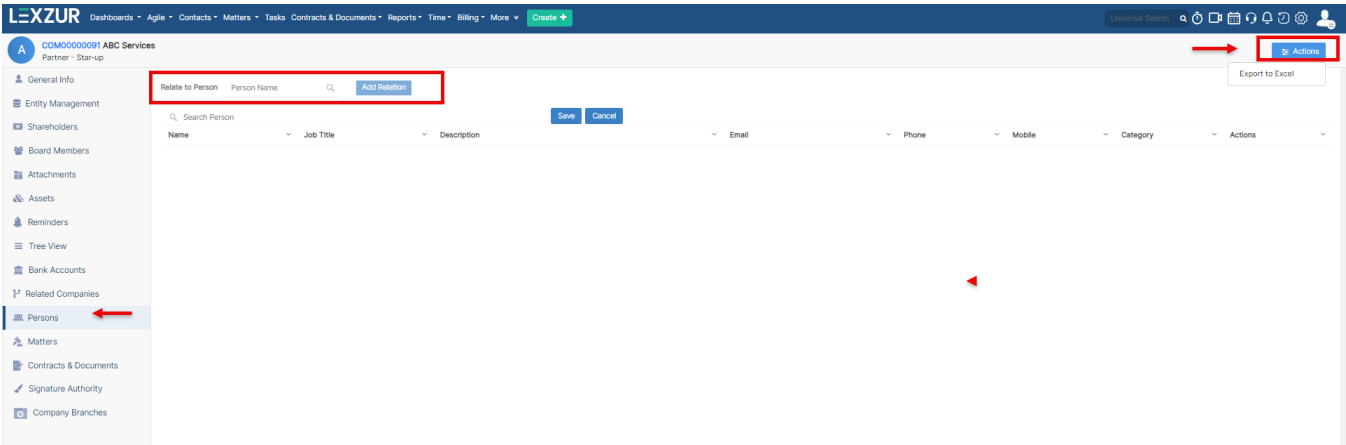
Objectives

- Link a person, matter, or contract related to the company.

Steps

The **Persons** tab is used to keep track of Persons related to a Company. For example, the CEO, the Lawyer of the Company, or other employees. Persons related to the Company are present with their information in the Persons module within the Contacts which will be covered next.

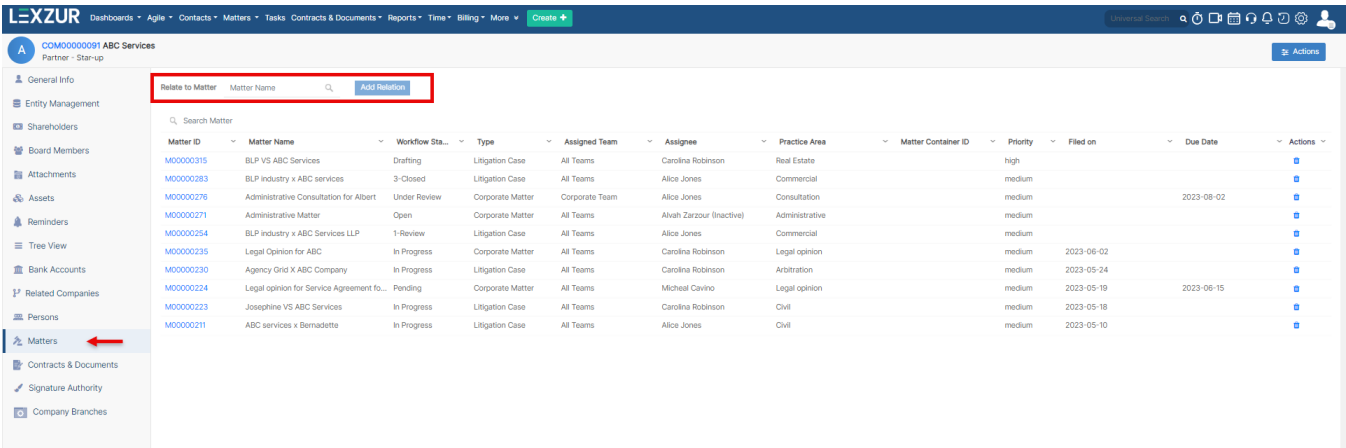
To relate the person, you can simply write the person name and then press on **Add Relation** Button.



From the **Actions** button, you can export to excel the company-related persons.

Matters tab is auto-populated based on the Matters in the application. Whether a client, opponent, or relation of a different category as long as the Company has been linked to the matter it will appear here.

To relate the matter, you can simply write the matter name and then press on **Add Relation** button.



You can also export to excel the company-related matters from the **Actions** button.

Contracts & Documents tab is filled automatically as long as the company has been linked to a contract.

To relate a contract, you can simply write the contract name and then press **Add Relation** button.

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General Info

Entity Management

Shareholders

Board Members

Attachments

Assets

Reminders

Tree View

Bank Accounts

Related Companies

Persons

Matters

Contracts & Documents

Signature Authority

Company Branches

Relate Contract/Document

Name

🔍

Add Relation

🔍 Search Contract/Document

ID	Name	Type	Value	Assignee	Date	Start date	End date	Actions
CT373	Employment Agreement-Maria	General employment contract	100,000.00	Alice Jones	2023-10-05	2023-11-01	2023-10-19	
CT366	Insurance contract Between SEHA and...	Insurance	2,000.00	Carolina Robinson	2023-09-13	2023-09-13	2024-09-13	
CT354	Purchase Agreement Office Supply	Purchase Agreement	0.00	Sam Marvinen	2023-08-31	2023-08-08	2024-08-08	
CT314	Purchase Agreement-SSC software	Purchase Agreement	0.00	Carolina Robinson	2023-07-06		2023-10-26	
CT278	[Amendment 202305] Partnership agr...	Partnership Agreement	100,000.00	Michael Cavino	2023-05-17	2023-06-22	2024-07-31	
CT277	Partnership agreement-Agency Grid	Partnership Agreement	0.00	Michael Cavino	2023-05-17	2023-06-22	2024-06-22	
CT275	Employment Contract between ABC s...	General employment contract	0.00	Alice Jones	2023-05-23	2023-05-23	2024-05-23	
CT268	Commercial Lease Agreement 256	Commercial Lease Agreement	0.00		2023-05-18			
CT263	Employment Agreement between ABC...	General employment contract	200.00	Carolina Robinson	2023-05-05	2023-05-05	2024-05-05	
CT262	Non Disclosure Agreement for ABC	Non-disclosure Agreement	0.00		2023-05-05			

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

Thank you!