

How to Add a New Person

Objectives

- Insert a Person in the database

Steps

You can add Persons to LEXZUR through the quick **Create** button in the main menu of the application or the plus button on the person grid.

LEXZUR

Dashboards • Agile • Contacts • Matters • Tasks • Contracts & Documents • Reports • Time • Billing • More

Create +

Universal Search

+

⚙

👤

Persons

All Persons

Save Filter

SEARCH FILTERS

Person #	Name	Category	Email	Phone	Mob
PER00000096	Abbas Al Murtada	Client			
PER00000072	Abbas Abbas	Client			
PER00000089	Abbas Batz	Internal	hussein.jardal@app-legal...		
PER00000077	Adam David	Client	Adam.david@backline.com	+1 568887854	+12
PER00000040	Adam Skins	Client	Adam@skins@outlook.com	+27 458 002 5699	+27
PER00000018	Adam Christopher	Client	ademchristopher@gmail.c...		
PER00000076	Adnan Hamza	Client			
PER00000126	Adnan Zarzour	Client	soheir.zarzour@gmail.com		
PER00000145	Albert Dave	Client			
PER00000067	Albert smith	Supplier	albertsm052@gmail.com		
PER00000105	Alberto Scott	Partner			
PER00000005	Aleen Peterson	Internal	carolnemraved@gmail.c...		lawyer

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

Company	Reference #	Sub-category	Additional ID Type	Additional ID Value
Commercial Dep...		Engineer		
Back-Line Comp...				
SA Constructions	RN-57749	Engineer	National ID	12569
IT Department				
Global Tech		Supplier		

Columns

There are 3 required fields:

- **First Name**
- **Last Name**
- **Category.**

Category: The relation between the person and the law firm/Legal department, a standard list of values including Client, Opponent, Partner

New Person

Title

+ Add Title

None

First Name*

Last Name*

Category*

Choose Person / Company Category

Sub-category

+ Add Sub-category

None

Job Title

Email

Start typing

Shared With (Public)

Set as Private

Save

Save and Create Another

Cancel

Other fields are optional:

Sub-Category: A customizable list of values, to further define the relation with this person ex: Internal Client

Company group: You can add company groups into LEXZUR.

You can add the person's job title and phone number.

New Person

✕

Sub-category

+ Add Sub-category

None

Job Title

Email

Start typing

+

Phone

Mobile

Company / Group

+ Add Company

Start typing to select from possible matches.

Contact Info

>

Shared With (Public)

Set as Private

Save

Save and Create Another

Cancel

If you click on Contact Info, you can add the website. From Address, you can set the address information. Nationality, foreign first and last name, date of birth, and ID number can be specified from Personal Details.

New Person



Company / Group

[+ Add Company](#)



Start typing to select from possible matches.

 [Contact Info](#)




Website

Fax

 [Address](#)




 [Personal Details](#)



 [Document](#)



 [Custom Fields](#)



Shared With  (Public)

[Set as Private](#)

Then press **Save**. The new Person will be added to the person grid.

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

Thank you!