How to Manage Corporate Matters in Mobile App

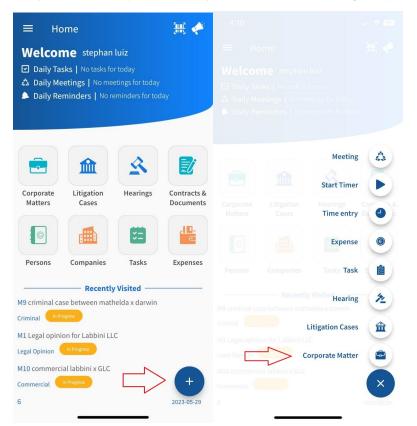
Objectives:

- Add Corporate Matter
- Manage and capture matter details

Steps:

In the Lexzur Mobile application, you can efficiently manage your Corporate Matters.

First, you have to add Corporate Matters to your database. You do that through the quick + button located in the lower right of the main page.



There are 3 mandatory fields:

- Name: The best practice is to enter information that will make this Corporate Matter easier to search and find later on.
- **Practice Area:** A customizable drop-down list to define the related area of practice for this matter.
- Arrival Date: The Arrival date is when this matter reached your office, by default, it takes the current date.

 Add Corporate Matter 	Q	SAVE
Name*		
Description		
Practice area* Arbitration		*
Client Type Company / Group		*
Client Name		
Requested By		
Assigned Team* Legal Team		*
Assignee	\times	*

Other fields are optional; however, it's always better to fill out these fields to better generate reports at a later stage. Optional fields include the description, client name, requested by, assignee, and so on.

Once you've added your Matter, you can check it by clicking on the Corporate Matters button on the main page.



You can start by using the filters that will help you search for a specific Corporate Matter based on the criteria of your selection. For example, you can search for Corporate Matters by client name.

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<	Corporate Matter	م
Assignee	✓ Requested By ✓	😤 All Filters(5)
M14: test ma	tter	Ŏ
Open Administrative		*
		:
In Progress	ation request for saac	Ŏ
All Filters		Clear All Filters
Client Name		>
Assigned Team		>
Stage		>
Internal ref num	iber	>
Workflow Statu	5	>
Filte	r (Cancel

You can click on the Matter's block to open its page and edit or capture more information, such as the matter details and related documents.

From the icons beside each matter, you can log time entries, change the workflow status, add tasks and reminders, and much more.

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<	Corporate Matter	્ર
Assignee	✓ Requested By ✓	All Filters(5)
M13: consult In Progress Other Requested By: saa	ation request for saad	d ∕∂ €
M11: legal op Open Legal Opinion	inion for hind	ð * :
M3: Employn Open Employment	nent contract review	ð * :
M2: Acquisiti Open Mergers and Acqu		() () () () () () () () () () () () () (
M1: Legal opi	inion for Labbini LLC	Ŏ

Through the + button in each corporate matter, you can create new folders and add attachments related to this corporate matter.

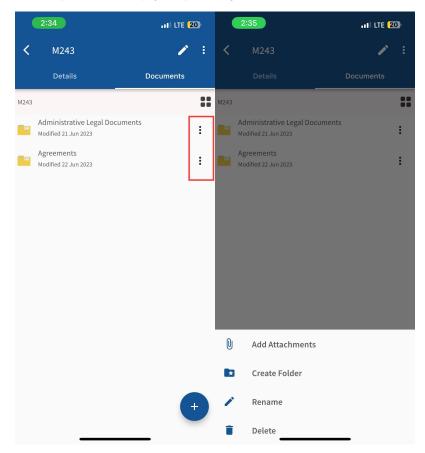
📑 Date —	Create Folder
Arrival Date 🛛 🗛	dd Attachments 2
	2 2 2
	×

You can also edit any details easily by simply clicking on the pen icon on the top right of the case details page, and do the needed modifications.

Through the **3 points** located at the top right of the screen, you have the ability to add tasks, reminders, notes, record expenses, time logs to your matter, and much more.

7:28	3	, ♀ 22)	7:29	,ıll 🗢 22)
<	M13	/ :	< M13	1
	Details		Details	Documents
consulta	ation request for saad		consultation request for saad	
🕞 Des	scription	>	Description	>
🚺 Det	tails	>	1 Details	
Practice	area	Other	Practice area	Other
Workflo	w Status	In Progress	Workflow Status	In Progress
U	Add Attachment		Priority	critical
×	Create Folder		Value Assignee(s)	0.00
Ō	Start Timer		Assigned Team	Legal Team
â	Add Task		Assignee Client Name	stephan luiz saad styles
	Add Reminder		Requested By	saad styles
8	Add Note		Date Arrival Date	> 2023-03-29
0	Record Expense		Filed On	202 29
0	Related expenses		effort	>

Additionally, the Documents page lets you manage the related folders and documents.



Via the **plus** button, you can **create folders** or **add attachments.**

The 3 dots options next to each folder/file enable you to add more attachments, create folders, and rename or delete.

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

Thank you!