

How to Manage Corporate Matters

Objectives

- Insert a Corporate Matter in the database
- Correct/Revise/Update data related to an existing Matter
- Capture and manage a Corporate Matter's details

Steps

In LEXZUR you can efficiently manage Corporate Matters at every stage in a smart and agile central software workspace, where users can collaborate with internal and external stakeholders, keep track of legal deadlines and automate reminders sent as emails or notifications.

First, you have to add Corporate Matters to your database. You do that through the **Create** button in the navigation menu.

LEXZUR

Dashboards

Agile

Contacts

Matters

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Create +

Universal Search

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Corporate Matters

All

Save as

1 - 20 of 144 items

	ID	Assignee	Client Name	Name	Practice Area	
☐	M00000330	Carolina Robinson	Adam Skims	Legal Advice for Adam	Commercial	
☐	M00000328	Jimmy Peterson	Anna Robin	Legal Consultation for Paul Jones	Consultation	
☐	M00000327	Alvah Zarzour (Inactive)	Maria Smith	legal advice	Consultation	
☐	M00000326	Carolina Robinson	Albert Company	Legal Advice for Albert	Real Estate	
☐	M00000324	Carolina Robinson	Alice Jones	Legal Advice on Purchase Agreement	Agreement	
☐	M00000322	Carolina Robinson	Maria Smith	test	Civil	
☐	M00000319	Carolina Robinson	Advanced Industries	legal advice for Advanced Industries	Agreement	
☐	M00000313	Carolina Robinson	BLPC	Legal Advice on Purchase Agreement	Agreement	
☐	M00000312	Carolina Robinson	Annabela Ray	Legal Advice on purchase agreement	Commercial	
☐	M00000311	Aleen Peterson	Maria Smith	Trademark	Intellectual Property	Open
☐	M00000310	Carolina Robinson	Maria Smith	Patent-software	Intellectual Property	Open
☐	M00000306	Jimmy Peterson	STB	legal opinion for STB	Civil	In Progress

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

Export

Tools

Advanced

Columns

Important Development

23-11-27 11:38:18]: Matter in...

23-11-21 10:40:47]: matter under...

23-11-09 11:02:05]: Matter reviewed and we...

23-11-07 13:07:06]: we met with the client 123

23-11-03 16:18:54]: finalizing 123

[2023-10-23 14:34:18]: attached documents, 1222

There are some fields that need to be filled out, such as the:

- **Matter Name**
- **Practice Area**
- **Arrival Date**
- **Client Name**

In addition to some information such as due date, assignee user, matter rate, or custom fields.

Add Corporate Matter

General Info

More Details

Date & Time

People

More Details

Custom Fileds

Matter rate

Cancel

✓ send a notification

Save & Create New

Save

General Info

Name:*

Name

Practice Area:*

select an option

+ Practice Area

Arrival Date:*

2023-06-15

Hijri Date

Client Name:

Company

Start typing

Description:

Description

Internal Ref Number:

Matter Priority:

You can now track and manage all your corporate matters from one grid. From the **Matters** tab choose **Corporate Matters**.

LEXZUR

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Agile
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More

Create +

Universal Search

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Corporate Matters

All

1 - 20 of 144 items

Export

Tools

ID	Assignee	Matter Containers	Name	Practice Area	Workflow Status	Important Development
M00000330	Carolina Robinson	Intellectual Properties	Legal Advice for Adam	Commercial	In Progress	[2023-11-27 11:38:18]: Matter in...
M00000328	Jimmy Peterson	Anna Robin	Legal Consultation for Paul Jones	Consultation	Under Review	[2023-11-21 10:40:47]: matter under...
M00000327	Alvah Zazour (Inactive)	Maria Smith	legal advice	Consultation	Open	
M00000326	Carolina Robinson	Albert Company	Legal Advice for Albert	Real Estate	In Progress	[2023-11-09 11:02:05]: Matter reviewed and we...
M00000324	Carolina Robinson	Alice Jones	Legal Advice on Purchase Agreement	Agreement	In Progress	[2023-11-07 13:07:06]: we met with the client 123
M00000322	Carolina Robinson	Maria Smith	test	Civil	Open	
M00000319	Carolina Robinson	Advanced Industries	legal advice for Advanced Industries	Agreement	In Progress	[2023-11-03 16:18:54]: finalizing 123
M00000313	Carolina Robinson	BLPC	Legal Advice on Purchase Agreement	Agreement	3-Closed	
M00000312	Carolina Robinson	Annabela Ray	Legal Advice on purchase agreement	Commercial	In Progress	
M00000311	Aleen Peterson	Maria Smith	Trademark	Intellectual Property	Open	
M00000310	Carolina Robinson	Maria Smith	Patent-software	Intellectual Property	Open	
M00000306	Jimmy Peterson	STB	legal opinion for STB	Civil	In Progress	[2023-10-23 14:34:18]: attached documents, 1232

Start by using the advanced 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 practice area, Assignee, Client name, and so on.

Corporate Matter Search Filters

Matter ID
contains

Practice Area
Equal
Legal Opinion x

Assignee
contains

Workflow Status
Equal
Select

Name
contains

Assigned Team
Equal
Select

Internal Ref Number
contains

Status Comments
contains

More Filters Criteria max

Reset Submit [Hide]

Corporate Matters All Save as

1 - 49 of 49 Items

Search Advanced Columns

ID	Name	Practice Area	Internal Ref Number	Workflow Status	Due Date	Priority	Requested by	Client Name
M00000172	Document Review on Property Mortgage	Consultation	201/2021	4-In Progress	2021-02-04	high	Zachy Buckley	BackBoss

Corporate Matters All Save as

1 - 15 of 15 Items

Search Advanced Columns

ID	Practice Area	Assignee	Name	Arrival Date	Client Name	Workflow Status	Requested by	Important Development
M00000238	Legal opinion	James Marven	Legal Opinion for changing partner	2023-06-12	Mohamed Mustafa	In Progress		[2023-06-12 13:2
M00000235	Legal opinion	Carolina Robinson	Legal Opinion for ABC	2023-06-02	ABC Services	In Progress	Alvah Zarzour	
M00000224	Legal opinion	Micheal Cavino	Legal opinion for Service Agreement for ABC services	2023-05-19	ABC Services	Pending		
M00000222	Legal opinion	Carolina Robinson	Legal opinion on Agreements related to Albert Insurance Company	2023-05-17	Albert Insurance Company	In Progress		
M00000209	Legal opinion	Sam Marven	Legal opinion for Service Agreement for ABC services	2023-05-09	ABC Services	Open	Elise Khoury	
M00000205	Legal opinion	Micheal Cavino	Legal opinion for ABC services	2023-05-05	ABC Services	Open		
M00000188	Legal opinion	Sam Marven	Legal opinion for Service Agreement for BLP	2023-03-28	BLP Industry	Done		

Also, you can save these filters for later use, and export the results to a spreadsheet for reporting.

Corporate Matters Legal Opinion Matters Save as

1 - 15 of 15 Items

Save Filter

Filter Name* Legal Opinion Matters

☐ Filter is visible to all users

Save Close

Now, to go further with additional modifications, click on the Matter's name or ID to open its page.

The General Info Tab allows you to add details or modify existing information, update workflow statuses, and record any important developments or updates.

M

M00000229 Legal Opinion on Purchase Agreement for BLP

Matter - Corporate Matter

1-Review

2-In Progress

3-Closed

More

Save

Actions

General Info

Custom Fields

External Advisor

Related Contributors

Notes

History

Tasks

Reminders

Emails New

Related Advisor Tasks

Bills

Attachments

Expenses

Time Entries

Invoices

Matters

Trust8,520.00 USD

Paid2,100.00 USD

Due0.00 USD

Billable5,750.00 USD

General Info

NameLegal Opinion on Purchase Agreement f

Practice AreaAgreement

Workflow StatusIn Progress

Workflow usedLegal Team Review

Internal Ref Number253

Matter ContainerBLP Matters

Matter PriorityMedium

StageNone

Client NameBLP industry

Value (USD)0

DescriptionThis legal opinion pertains to a purchase agreement governing the rights and obligations of our organization. The legal team reviews the agreement's provisions regarding intellectual property rights, territory, fees, marketing obligations, and termination rights. The opinion provides insights on the legal implications, risks, and recommended modifications to safeguard our organization's interests and comply with franchise regulations.

Important Development[2023-05-2 15:47:00]: Settlement Negotiations Reached
[2023-05-10 23:24:37]: Meeting with BLP team for discussion

People

Assigned Te...All Teams

AssigneeAlice Jones

Referred ByStart typing

Requested B...Peter Young

Company Name

Approved by:

Billing Preferences

Billing MethodHourly Rate

Privacy

For efficient collaboration, you can outsource this matter to external Legal Practitioners, and mention the contributors working on the matter if any.

M

M00000229 Legal Opinion on Purchase Agreement for BLP

Matter - Corporate Matter

1-Review

2-In Progress

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Time Entries

Invoices

Matters

Contracts & Documents

Settings

External Advisor

AddSaveCancel

CompanyExternal AdvisorsRate per hour

Common LawMicheal Cav (michealcavin30@gmail...200.00

Related Contributors

AddSaveCancel

Person NameRoleCommentsAdded ByAdded On

Alice JonesCarolina Robinson2023-06-16 09:27:27

Notes

All threadsNotesEmails

Add Note

All Threads

Expand All / Collapse All

Persons

+ Add New

No related Person found; Click to Add "Person"

Audit

In addition, take note of all the noteworthy updates related to this matter. You can also log emails with attachments as matter notes using Outlook or Gmail Connect.

Assign tasks and set reminders to your team when several people are working in parallel on the same matter. You can then track all the associated tasks and reminders within the current matter, along with all their details.

M

M00000229 Legal Opinion on Purchase Agreement for BLP

Matter - Corporate Matter

Trust 8,520.00 USD

Paid 2,100.00 USD

Due 0.00 USD

Billable

Time entry

Export to Excel

Start Timer

Bulk Transfer to another Matter

General Info

Tasks

Reminders

Emails New

Related Advisor Tasks

Bills

Attachments

Expenses

Time Entries

Invoices

Matters

Contracts & Documents

Settings

☐	Date	User	Effort	Rate	Category	Internal Status	Billable	Description
☐	2023-09-12	Carolina Robinson	30m (0.50h)	Default Rate	Drafting		Yes	2023-06-10-24
☐	2023-06-23	Carolina Robinson	2h 30m (2.50h)	500	Meeting	Reviewed	Yes	
☐	2023-06-21	Carolina Robinson	2h 30m (2.50h)	500	Meeting	Reviewed	Yes	
☐	2023-06-20	Carolina Robinson	2h 30m (2.50h)	500	Meeting	Reviewed	Yes	
☐	2023-06-19	Carolina Robinson	2h 30m (2.50h)	500	Meeting	Reviewed	Yes	
☐	2023-06-16	Carolina Robinson	2h 30m (2.50h)	500	Meeting	Reviewed	Yes	
☐	2023-05-26	James Marven (Inactive)	1h (1.00h)	Default Rate	Meeting	To-Be Reviewed	Yes	Meeting v
☐	2023-05-26	James Marven (Inactive)	30m (0.50h)		Meeting	To-Be Reviewed	No	Meeting v
☐	2023-05-23	Carolina Robinson	1h (1.00h)	Default Rate		To-Be Reviewed	Yes	
☐	2023-05-23	Carolina Robinson	1h (1.00h)	Default Rate	Planning	To-Be Reviewed	Yes	FRA-CT-2 *Employ

Filter

Related Entity App4Legal-USD (USD)

User Username

From YYYY-MM-DD

To YYYY-MM-DD

Balance

Total Effort 16h 30m

Billable 16h

Non-billable 30m

Total 8,000.00 USD

Moreover, you can check all the invoices related to this matter from the **Invoices** tab.

M

M00000229 Legal Opinion on Purchase Agreement for BLP

Matter - Corporate Matter

Trust 8,520.00 USD

Paid 2,100.00 USD

Due 0.00 USD

Billable 5,750.00 USD

General Info

Tasks

Reminders

Emails New

Related Advisor Tasks

Bills

Attachments

Expenses

Time Entries

Invoices

Matters

Contracts & Documents

Settings

Invoices

Actions

Invoice Date	Invoice#	Prefix Type	Client's Account	Client Account Number	Total
2023-05-26	INV0000084	Invoice Number Prefix	BLP Industry - USD	null	2,100.00 USD
2023-05-19	INV0000083	Invoice Number Prefix	BLP Industry - USD	null	2,750.00 USD

Filter

Related Entity App4Legal-USD (USD)

Currency USD

Billing Preferences

Billing Method Hourly Rate

Sub Total

Services 1,000.00 USD

Expenses 1,100.00 USD

Time Entries 2,750.00 USD

Bill Items 0.00 USD

Last but not least, you can link a Matter to an existing Matter or Contract in LEXZUR. You can also adjust the users' rates, matter rate, capping, partners' percentage, and the billing preferences of this Corporate Matter from the Settings tab.

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

Thank you!