

How to Manage Clients in LEXZUR

Objectives

- Manage Clients
- Add new Client

Steps

You can manage clients easily in LEXZUR. First, you can access the list of all your clients under the **Contacts Module** from the navigation menu

The screenshot shows the LEXZUR interface with the 'Contacts' module selected in the navigation menu. The 'Clients' tab is active, displaying a list of clients. The table has columns for ID, Client Name, Email, Sub-category, City, Mobile, Phone, Country, and Related to. A red box highlights the 'All Clients' button in the top right corner of the table.

ID	Client Name	Email	Sub-category	City	Mobile	Phone	Country	Related to
CL188	Stephan kuz	omran.harni@app4legal.com						PER00000149
CL187	الان كوز							PER00000148
CL185	Anna Robin							PER00000146
CL184	Albert Company							COM00000125
CL183	Albert Dave							PER00000145
CL182	Annabala Ray							PER00000144
CL181	Green Tech Inc							COM00000123
CL180	STB							COM00000122
CL179	DIG international limited							COM00000121
CL178	BLPC							COM00000120
CL177	Mesfin							COM00000119
CL175	NBO							COM00000117
CL173	Steven Batz							PER00000142
CL169	test testing	TimaA@gmail.com						PER00000139
CL167	Sam Abed	soheir.zarour@gmail.com						PER00000138
CL164	فرقة ايس							COM00000111
CL162	Jana Jana	jana.hamshou@app4legal.com						PER00000133
CL160	لوزة							COM00000108
CL159	roots							COM00000106
CL157	Asim Ali							PER00000131

Clients can be either companies or persons, and the grid view provides a detailed list of clients along with their essential information. You can easily search and filter clients to quickly find the specific ones you need. Moreover, the option to export the client list to Excel streamlines data management.


The screenshot shows the LEXZUR interface with the 'Clients' module selected. The 'Persons Only' filter is applied, and the 'Country' filter is set to 'Equal'. The table displays a list of clients with their details. A red box highlights the filter sidebar on the left.

ID	Client Name	Email	Sub-category	City	Mobile	Phone	Country	Related to
CL188	Stephan kuz	omran.harni@app4legal.com						PER00000149
CL187	الان كوز							PER00000148
CL185	Anna Robin							PER00000146
CL184	Albert Company							COM00000125
CL183	Albert Dave							PER00000145
CL182	Annabala Ray							PER00000144
CL181	Green Tech Inc							COM00000123
CL180	STB							COM00000122
CL179	DIG international limited							COM00000121
CL178	BLPC							COM00000120
CL177	Mesfin							COM00000119
CL175	NBO							COM00000117
CL173	Steven Batz							PER00000142
CL169	test testing	TimaA@gmail.com						PER00000139
CL167	Sam Abed	soheir.zarour@gmail.com						PER00000138
CL164	فرقة ايس							COM00000111
CL162	Jana Jana	jana.hamshou@app4legal.com						PER00000133
CL160	لوزة							COM00000108
CL159	roots							COM00000106
CL157	Asim Ali							PER00000131

You can also add new clients directly from the same page. Click on the "+" on the top right of the page. Specify whether this client is a company or person and fill out the required fields accordingly.

Add Client



☒ Company ☐ Person 

Name*

Nickname*

Sub-category

None

City

Country

Website

Mobile

Phone

Email

Use semicolons separator (;) to add multiple emails: for ex. john@gmail.com;john@live.com




[Save](#) [Cancel](#)

For further modifications and access to detailed information about a particular client, simply click on their ID to navigate to their dedicated page.

JS

PER00000106 Jennifer Spencer

Client

[Save](#)

General Info

Job Details

Address

Personal Details

Comments

Attachments

Persons

Matters

Contracts & Documents

Reminders

Expenses

Time Entries

Supplier Bills

Invoices

Trust Fund Deposits

Partner Shares

General Info

Job Title

First Name*

Middle Name

Last Name*

Category*

Sub-category

Title

Reference #

Company / Group

Jennifer

Spencer

Client

Choose Sub-category

None

Start typing

Mobile

Phone

Email

Tax Number

Additional IDs


Country

Status

Start typing

Choose One

United States



Privacy

Shared With

Everyone

Set as Private

Custom Fields

Referred by

Passport N...

Custom Fie...

Custom Fie...

Custom Fie...

Audit

Job Title

Job Title

Manager

Website

Start typing

Is Lawyer





In-house Lawyer

Here, you have the ability to track and manage all client details, including general information, related documents, and reminders.

Additionally, on the client's dedicated page, you can view a comprehensive overview of their expenses, time entries, related bills, invoices, trust deposits, and partners' shares. This feature allows you to stay informed and in control of all financial aspects related to each client.

LEXZUR

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

Universal Search 🔍    

B

COM00000050 BTL Insurance

Client - Banking

General Info

Entity Management

Shareholders

Board Members

Attachments

Assets

Reminders

Tree View

Bank Accounts

Related Companies

Persons

Matters

Contracts & Documents

Signature Authority

Expenses

Time Entries

Invoices

Supplier Bills

Partner Shares

Company Branches

Open 0

Paid 0

Overdue 2,039.40

Partially Paid 0

Related to Invoices

Invoice#	Client's Account	Matter ID	Matter Name	Total	Balance Due	Due On	Client Account Number	paymentsMade	Currency	Status	Invoice Date	P.O.#
INV00000073	BTL Insurance - USD	MC00000200	BTL Insurance x ABC services	780.00 USD	280.00	2023-06-02	CL1	500.00	USD	overdue	2023-05-03	
INV00000012	BTL Insurance - USD	MC00000067	Legal opinion for BTL Insurance	2,759.40 USD	1,759.40	2022-09-23	CL1	1,000.00	USD	overdue	2022-08-24	

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

Thank you!