

How to Set Categories/Sub-Categories to Persons

Objectives

- Set categories/sub-categories to persons to search easily

Steps

You can define the Categories and Subcategories for persons on the **New Person** page.

The screenshot shows the 'New Person' form with the following fields and options:

- Title:** A dropdown menu currently set to 'None'. A '+ Add Title' link is to the right.
- First Name*:** A required text input field.
- Last Name*:** A required text input field.
- Category*:** A required dropdown menu currently set to 'Supplier'. A red arrow points to this field.
- Sub-category:** A dropdown menu currently set to 'Stationary Business'. A red arrow points to this field. A '+ Add Sub-category' link is to the right.
- Job Title:** A text input field.
- Email:** A text input field with a placeholder 'Start typing' and a blue '+' button to the right.
- Phone:** A text input field.
- Mobile:** A text input field.
- Privacy:** At the bottom, there is a toggle switch labeled 'Shared With Public' which is currently turned on. To its right is a link 'Set as Private'.
- Buttons:** At the bottom, there are three buttons: 'Save', 'Save and Create Another', and 'Cancel'.

- **Category:** is the relation between the person and the law firm/Legal department, a standard list of values including Client, Opponent, Partner, and so on
- **Sub-Category** is a customizable list of values, to further define the relation with this person ex: Internal Client.

You can also set the Categories and Subcategories to your persons in the edit person page.

AB PER00000003 Alvah Batz
Supplier - External Client

General Info

Job Details

Address

Personal Details

Comments

Documents

Persons

Matters

Reminders

General Info

First Name* Alvah

Middle Name

Last Name* Batz

Category* Supplier

Sub-category External Client

Title Mr

Reference # Rn12345678

Company / Group

Mobile +1456875421

Phone +14587458965

Email Start typing

ID Nb 54521552

Country United States

Status

Privacy

Shared With Everyone

Custom Fields

Passport ... 02496854263

Type of La... Advocate

Payment T... Cheque

Client? No

payment d...

Once you've assigned categories/sub-categories to persons, searching becomes more streamlined.

Use the **Advanced** search option on the **Person** grid to filter results based on the associated categories/sub-categories.

Persons All Persons Save Filter

Filter Search Search Persons

Category Sub-category

Person #	Name	Category	Email	Phone	Mobile	Job Title	Company	Reference #	Sub-category	Additional ID Type	Additional ID Value
PER00000043	Robert Cavin	Client	RobertCavin@outlook.com	+1 002 556 8936	+1 002 556 8936	CEO	Advanced Indust...		Lead		
PER00000045	William Bill	Client	WilliamBill@brandingco.com	+1 589 895 2566	+1 589 895 2566	CEO	Branding Compa...		Lead		

Category Sub-category

Run Save Filter

1 - 2 OF 2 ITEMS 20

You can save the filter, give the filter a name and it will appear on the list of quick filters.

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

Thank you!