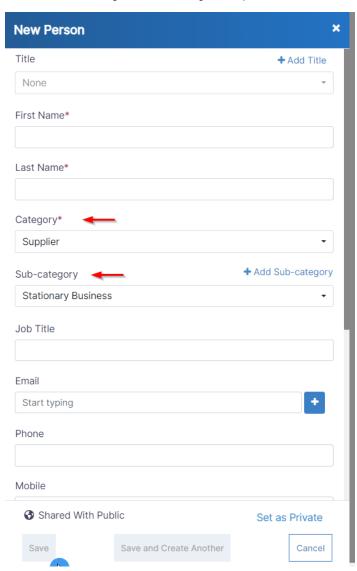
How to Set Categories/Sub-Categories to Persons

Objectives

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

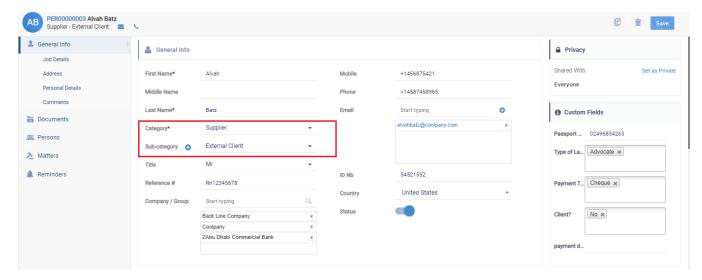
Steps

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



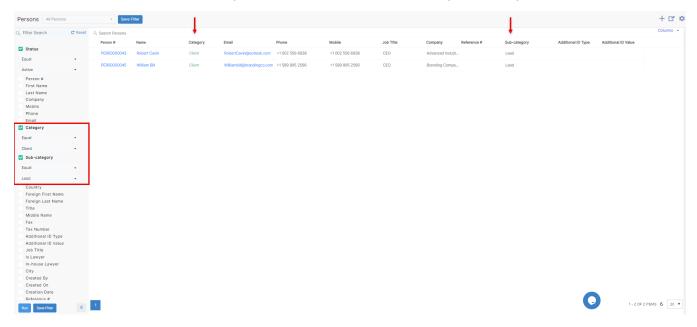
- Category: is the relation between the person and the law firm/Legal department, a standard list of values including Client, Opponent, Partner, and so on
- Sub-Category is a customizable list of values, to further define the relation with this person ex: Internal Client.

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



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.



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!