

How to Add a New Corporate Matter

Objectives

- Insert a Corporate Matter in the database

Steps

Corporate Matters can be easily added via the **Create** button in the navigation menu:

LEXZUR

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Agile

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Matters

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Corporate Matters

All

Save as

1 - 20 of 146 items

ID	Assignee	Client Name	Name	Practice Area	Requested by	Value	Assigned Team	Arrival Date	Due Date
M00000031	Sam Marven	Advanced Industries	Acquisition for Advanced Industries by Fred Moriss	Acquisition	1-12-09 10:44:33: Closed and converted to...	500.00	All Teams	2021-11-11	2022-01-09
M00000249	Alice Jones	Global Tech	Acquisition for Global Tech	Acquisition		0.00	Corporate Team	2023-07-05	2023-11-29
M00000084	Alice Jones	SA Constructions	Acquisition for SA constructions	Acquisition		0.00	All Teams	2022-07-06	
M00000068	Michael Cavino	Stones Real Estate	Acquisition for Stones RE	Acquisition		0.00	All Teams	2022-03-18	
M00000041	Michael Cavino	Stones Real Estate	Acquisition for Stones RE by Bailey Chris	Acquisition	1-12-09 10:32:40: matter files are...	700.00	All Teams	2021-12-05	2022-01-23
M00000072	Carolina Robinson	Branding Company	Acquisition-Branding Company	Acquisition	2-07-01 11:52:22: I called Albert Smith...	0.00	All Teams	2022-05-30	2022-07-23
M00000213			Administrative Consultation for Adam	Consultation		0.00	Corporate Team	2023-05-15	2023-07-25
M00000276	Alice Jones	ABC Services	Administrative Consultation for Albert	Consultation		0.00	Corporate Team	2023-08-16	2023-08-02

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

You will be asked to fill out some mandatory fields and additional matter details:

Add Corporate Matter

Cancel

✓ send a notification

Save & Create New

Save

General Info

More Details

Date & Time

People

More Details

Custom Fields

Matter rate

General Info

Name*

Legal opinion on Consultancy Agreement

Practice Area*

Consultation

Arrival Date*

2023-06-08

Client Name:

Company

BLP industry

Description:

Description

Internal Ref Number:

Matter Priority:

First, within the **General Info** tab, specify the name, area of practice, matter arrival date, and so on...

- **Name:** Enter a name for the matter - this will make it easier to search for later.
- **Practice Area:** A customizable list for defining the related area of practice for this matter. For example, Legal Consultancy, Settlement, Acquisition, Administrative, etc...
- **Arrival Date:** When this matter reaches your office, by default, it takes the current date.

The 3 fields above are sufficient for creating matters, however, you can add more information for reporting purposes

Additionally, you can describe the matter and identify the client requesting it, search for existing clients, or add new ones on the fly, specify the internal reference number, priority, privacy, and attach any related files if needed.

Add Corporate Matter

Cancel

✓ send a notification

Save & Create New

Save

General Info

More Details

Date & Time

People

More Details

Custom Fileds

Matter rate

Description:

Description

Internal Ref Number:

5892/2023

Matter Priority:

↑ High

Shared With

👤 Default User(s)

Drop files here to upload or [Browse](#)

Under the **More Details** tab, provide some extra details such as dates, related people, custom fields, rates, and so on:

Date & Time:

Some information includes:

- **Filed on:** the date on which you started working on the Matter.
- **Due Date:** Whether a deadline is imposed by the client or from your end.
- **Estimated Effort:** You can add an estimate of how much effort this Matter will require (This can later be compared with the actual effort from the Time Logs that are recorded on the matter)

Add Corporate Matter

Cancel

✓ send a notification

Save & Create New

Save

General Info

More Details

Date & Time

People

More Details

Custom Fileds

Matter rate

More Details

Date & Time

Filed on:

2023-06-15

📅

Due Date:

2023-10-31

📅

Closed On:

📅

Estimated Effort:

0

Date

📅

People

More Details

Custom Fileds

People:

Includes related people details such as:

- **Requested by:** the specific contact who requested this Matter.
- **Assignee:** The specific LEXZUR user, who is assigned to this matter, will belong to the chosen Assigned Team.
- **Assigned Team:** Select the Team that will be working on this Matter.



By default, all Users belong to the Team called All Teams. However, you can create multiple teams to reflect your workplace.

Add Corporate Matter

Cancel

✓ send a notification

Save & Create New

Save

General Info

More Details

Date & Time

People

More Details

Custom Fileds

Matter rate

People

Referred By:

Start typing

Requested by:

Start typing

Assigned Team:

Corporate Team

Assignee:

Start typing

+ Click to Add Users to the Team

Company

Start typing

Person

Start typing

User

Start typing

i More Details

>

And the names of any related company or person as well.

More Details:

- **Stage:** A customizable list that depicts the progress of the matter on the legal side.
- **Matter Container:** In case you've defined a Matter container you can link this new Matter to its related container.
- **Value:** A monetary value to this Corporate Matter.

Add Corporate Matter

Cancel

✓ send a notification

Save & Create New

Save

General Info

More Details

Date & Time

People

More Details

Custom Fileds

Matter rate

More Details

Date & Time

People

More Details

Stage:

select an option

+ Add Stage

Matter Container:

Start typing

Value:

0

Custom Fileds

Matter rate

Custom Fields:

Fill out the custom fields while adding the matter if necessary.

Cancel

✓ send a notification

Save & Create New

Save

General Info

More Details

Date & Time

People

More Details

Custom Fileds

Matter rate

People

More Details

Custom Fileds

Billing Arrangement

Department

Custom Field 1

Custom Field 3

Custom Field 2

Matter Rate:

Add any specific rate for this matter as well.

Cancel

✓ send a notification

Save & Create New

Save

General Info

More Details

Date & Time

People

More Details

Custom Fileds

Matter rate

More Details

Date & Time

People

More Details

Custom Fileds

Matter rate

Now you have added your corporate matter, you can go further with additional steps such as adding related tasks, reminders, or attachments.



The Matter has been created successfully.

[M00000481](#)

Now you can go further, for more steps

 [Add Task](#) 

 [Add Reminder](#) 

 [Add Documents](#) 

 [Skip](#)

You can now track and manage all your corporate matters from one grid.

LEXZUR

Dashboards

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Corporate Matters

All

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Advanced

Columns

Corporate Matters

Litigation Cases

Hearings

Matter Containers

Intellectual Properties

☐	ID	Assignee		Name	Practice Area	Workflow Status	Important Development	Requested by	Value	Assigned Team	Arrival Date	Due Date
☐	M00000031	Sam Marvinen		Acquisition for Advanced Industries by Fred Moris	Acquisition	Closed	[2021-12-09 10:44:33]: Closed and converted to...	Fred Moris	500.00	All Teams	2021-11-11	2022-01-09
☐	M00000249	Alice Jones	Global Tech	Acquisition for Global Tech	Acquisition	1-Review			0.00	Corporate Team	2023-07-05	2023-11-29
☐	M00000084	Alice Jones	SA Constructions	Acquisition for SA constructions	Acquisition	Open		Adam Skims	0.00	All Teams	2022-07-06	
☐	M00000068	Michael Cavino	Stones Real Estate	Acquisition for Stones RE	Acquisition	Open			0.00	All Teams	2022-03-18	
☐	M00000041	Michael Cavino	Stones Real Estate	Acquisition for Stones RE by Bailey Chris	Acquisition	Open	[2021-12-09 10:32:40]: matter files are...	Bailey Chris	700.00	All Teams	2021-12-05	2022-01-23



Learn more about how to manage your corporate matters [here](#).

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

Thank you!