

How to Link Matter/Case/Contract to a Matter

Objectives

- Link the matter to an existing matter/case
- Link the matter to an existing contract

Steps

Relating matters to other matters, cases or contracts enhances knowledge management, data consistency, and reporting capabilities. This saves time and effort in searching for relevant details, enabling faster and more efficient case management or contract handling.

To relate the matter to other corporate matters or litigation cases you can simply search for the matter name and then press the **Add Relation** button.

This will bring up a list of all the related matters allowing you to quickly and easily link them together.

LexZur interface showing the 'Matters' tab. A red box highlights the 'Relate Matter' search bar and the 'Add Relation' button. Below, a table lists related matters with columns for Matter ID, Comment, Companies, Referred By, Assignee, Practice Area, Matter Priority, and Workflow Status.

Matter ID	Comment	Companies	Referred By	Assignee	Practice Area	Matter Priority	Workflow Status
M00000067		Advanced Industries	Alice Jones	Michael Cavino	Administrative	high	Done
M00000043		Advanced Solutions	Robert Cavin	Alice Jones	Consultation	high	In Progress
M00000036		Advanced Industries	Johnny Dev , Robert Cavin	Aileen Peterson	Embezzlement	high	In Progress

Similarly, the related contracts could be tracked from the **Contracts & Documents** tab.

To relate the contract/ document, you can simply search for the contract name, choose the contract you want from the matching results, and then press the **Add Relation** button.

LexZur interface showing the 'Contracts & Documents' tab. A red box highlights the 'Relate Contract/Document' search bar and the 'Add Relation' button. Below, a table lists related contracts with columns for ID, Name, Type, Value, Assignee, Date, Start date, and End date.

ID	Name	Type	Value	Assignee	Date	Start date	End date
CT290	NDA - Alvah	Non-disclosure Agreement	0.00	James Marven (Inactive)	2023-06-16	2023-06-16	2024-06-16
CT159	Employment contract between ABC and AL...	General employment contract	0.00	Carolina Robinson	2022-12-20	2022-12-20	2023-12-20
CT54	General Employment Agreement - Alvah Sc...	General employment contract	5,000.00	Sam Marven	2022-02-04	2022-01-01	2023-01-01
CT12	Branding Company and Alvah Scott Agree...	Distribution Agreement	1,500.00		2022-01-10	2021-02-22	2022-02-22

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

Thank you!