

How to Apply Filters on Matters

Objectives

- Advanced search and create filters
- Quick search using filters

Steps

Each grid in Lexzur provides users with the flexibility to search for desired items easily using various criteria tailored to their needs. This allows users to create and save their filters for reporting purposes. Here's how to do it in Matters:

- Navigate to the Matters Module. Click on "Corporate Matters," "Litigation Cases," or "Matter Containers" to access the list of matters.

The screenshot shows the Lexzur interface with the 'Matters' module selected. A dropdown menu is open, showing options for 'Corporate Matters', 'Litigation Cases', and 'Hearings'. The 'Advanced' search button is highlighted with a red box. Below the dropdown is a table of Corporate Matters with columns for ID, Assignee, Client Name, Name, Practice Area, Workflow Status, Important Development, Requested by, Value, Assigned Team, Arrival Date, and Due Date.

ID	Assignee	Client Name	Name	Practice Area	Workflow Status	Important Development	Requested by	Value	Assigned Team	Arrival Date	Due Date
M0000031	Sam Marvin	Intellectual Properties	Acquisition for Advanced Industries by Fred Moriss	Acquisition	Closed	[2021-12-09 10:44:33]: Closed and converted to...	Fred Moriss	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	
M00000098	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
M00000072	Carolina Robinson	Branding Company	Acquisition-Branding Company	Acquisition	In Progress	[2022-07-01 11:52:22]: I called Albert Smith...	Elise Khoury	0.00	All Teams	2022-05-30	2022-07-23
M00000213			Administrative Consultation for Adam	Consultation	In Progress		Adam Christopher	0.00	Corporate Team	2023-05-15	2023-07-25

- Click on "Advanced" to apply advanced filters. Here, you can tailor your search filter based on specific criteria such as Practice Area, Assignee, Client Name, Dates, and more.

The screenshot shows the 'Corporate Matter Search Filters' form. The 'Practice Area' filter is highlighted with a red box. The form includes fields for Matter ID, Name, Assigned Team, Internal Ref Number, Status Comments, Assignee, Workflow Status, and Start typing. There is a 'Submit' button at the bottom left and a 'Reset' button at the bottom right.

- Once you've set your desired filters, click on "Submit." The grid will now display only the corporate matters according to your search filter.

The screenshot shows the Lexzur interface with the 'Matters' module selected. The 'Practice Area' column is highlighted with a red box. Below the dropdown is a table of Corporate Matters with columns for ID, Assignee, Client Name, Name, Practice Area, Workflow Status, Important Development, Requested by, Value, Assigned Team, Arrival Date, and Due Date.

ID	Assignee	Client Name	Name	Practice Area	Workflow Status	Important Development	Requested by	Value	Assigned Team	Arrival Date	Due Date
M00000324	Carolina Robinson	Alice Jones	Legal Advice on Purchase Agreement	Agreement	In Progress	[2023-11-07 13:07:06]: we met with the client 123	Alice Jones	0.00	All Teams	2023-11-07	
M00000319	Carolina Robinson	Advanced Industries	legal advice for Advanced Industries	Agreement	In Progress	[2023-11-03 16:18:54]: finalizing 123		0.00	All Teams	2023-11-03	
M00000313	Carolina Robinson	BLPC	Legal Advice on Purchase Agreement	Agreement	3-Closed		Alice Jones	0.00	All Teams	2023-10-27	
M00000293	Alice Jones	BLP industry	Risk Manag, Operational Readiness	Agreement	1-Review			0.00	All Teams	2023-09-14	
M00000237	Alice Jones	BLP industry	legal opinion on Service Agreement	Agreement	In Progress	[2023-06-08 12:25:00]:1233		0.00	All Teams	2023-06-08	
M00000234		Dave Security System	Legal Opinion on NDA	Agreement	1-Review			0.00	All Teams	2023-05-30	2023-06-30
M00000229	Alice Jones	BLP industry	Legal Opinion on Purchase Agreement for BLP	Agreement	In Progress	[2023-05-2 15:47:00]: Settlement Negotiations...	Peter Young	0.00	All Teams	2023-05-22	2023-08-31

- To save the filter for future use, click on "Save as." Enter a name for the filter and click on "Save." You have the option also to share this filter with all the users.

Save Filter ✕

Filter Name* ←

Filter is visible to all users

→

- Now, the saved filter will be available in the drop-down list for easy access anytime from the matters grid.

Corporate Matters Export ▾ Tools ▾							
1 - 20 of 39 items		Save as		Search		Advanced Columns ▾	
ID	Name	Owner	Client Name	Practice Area	Workflow Status	Latest Development	
<input type="checkbox"/>	M00000211	Legal Agreement for Bandia	Khulman	Bandia	Acquisition	1-Open	[2021-09-02 09:38:17]:
<input type="checkbox"/>	M00000172	Document Review on Property Mortgage	Garry Malbeck	BackBoss Company	Consultation	4-In Progress	I had a meeting with the ABC and
<input type="checkbox"/>	M00000155	Legal opinion for Branding Company	Jad Herbert (Inactive)	Branding Company	Legal Opinion	1-Open	
<input type="checkbox"/>	M00000153	SLA: Legal Opinion	Jon Bartman	Brancy	Consultation	1-Open	
<input type="checkbox"/>	M00000152	Legal opinion-Brandlair	Jad Herbert (Inactive)	Brandlair	Legal Opinion	1-Open	
<input type="checkbox"/>	M00000151	Acquisition of Pier Bank	Anastasia Katts	Casual Company	Acquisition	1-Open	
<input type="checkbox"/>	M00000150	Legal Opinion for Alvah Batz	Fred Morrison	Alvah Batz	Consultation	4-In Progress	[2021-07-15 12:20:13]:
<input type="checkbox"/>	M00000149	Acquisition of Branding Company by Burley Jast Pollich	Anastasia Katts	Burley Jast Pollich	Acquisition	1-Open	

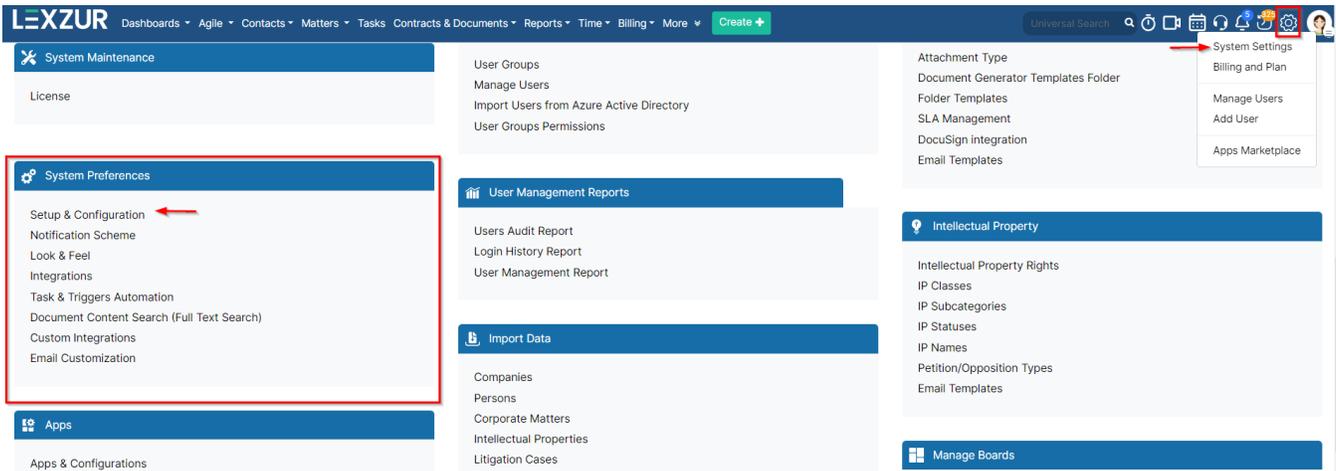
Additionally, you can directly access the desired list of matters based on your filters from the Matters module in the navigation menu. The list of Advanced filters will be displayed, allowing you to click on the filter directly before opening the matters grid.

Agile ▾ Contacts ▾ Matters ▾ Tasks Contracts & Documents ▾ Reports ▾ Time ▾ Billing ▾ More ▾ Create +

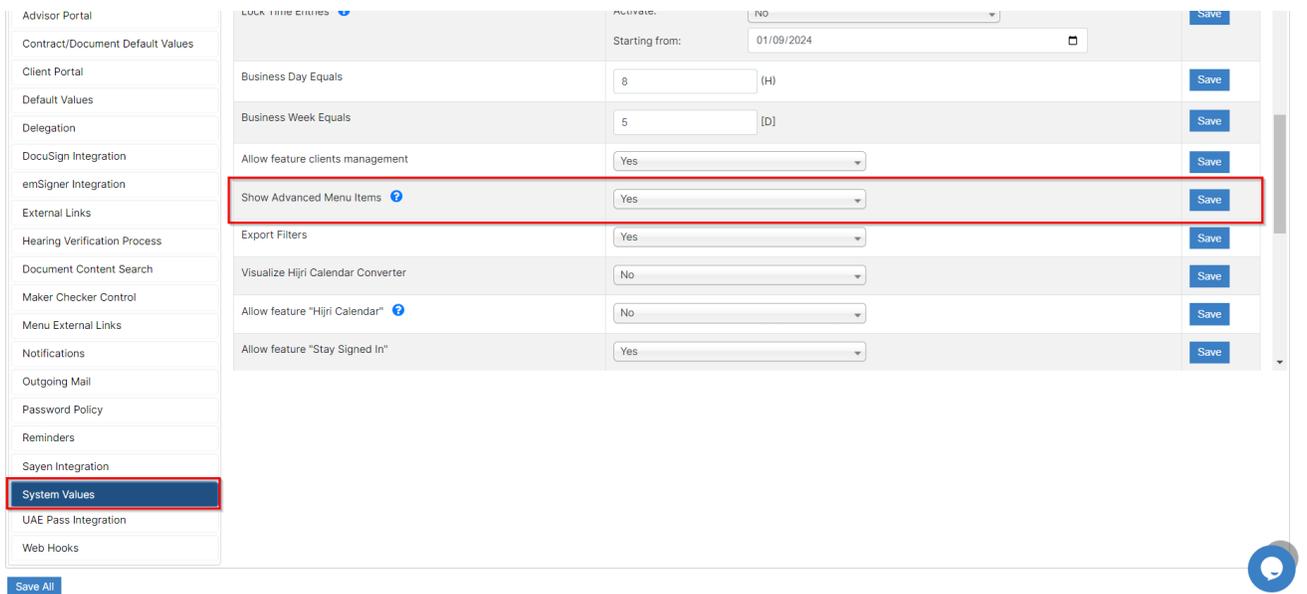
Corporate Matters ▸

All
Administrative matters
 Advanced solutions matters
 Banking Dept matters
 Carolina Matters
 Corporate Team Matters
 Legal Opinion Matters
 Matters Assigned to Alice
 Matters Assigned to Carolina
 Work in progress matters
 administrative matters

To enable this feature, go to **System Settings System Preferences Setup and Configuration:**



then navigate to the **System Values** tab, and set "Show Advanced Menu Items" to "Yes."



Once enabled, you'll have the option to choose the filter directly when hovering over the matters from the navigation menu.

Similarly, you can manage filters for Litigation Cases and Intellectual Properties at their respective levels.

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

Thank you!