

How to Capture and Manage Matter Details

Objective

- Capture & Manage Matter General Details
- Add and Manage Custom Fields
- Add and Manage Notes and Updates

Steps

Once you have added the matter, it will be accessible from the grid in the Corporate Matter module.

To access a matter, click on its name or ID in the grid. This will open the matter's profile, which is divided into multiple sections.

Corporate Matters											
1 - 20 of 146 items	All	Save as	Export Tools								
ID	Assignee	Client Name	Name	Practice Area	Workflow Status	Important Development	Requested by	Value	Assigned Team	Arrival Date	Due Date
M00000031	Sam Marvinen	Advanced Industries	Acquisition for Advanced Industries by Fred Morlis	Acquisition	Closed	[2021-12-09 10:44:33]: Closed and converted to...	Fred Morlis	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
M00000072	Carolina Robinson	Branding Company	Acquisitive 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
M00000276	Alice Jones	ABC Services	Administrative Consultation for Albert	Consultation	Under Review		Adam Christopher	0.00	Corporate Team	2023-08-16	2023-08-02
M00000161	Alice Jones	Jennifer Spencer	Administrative consultation for Jennifer	Administrative	Open			0.00	All Teams	2023-02-01	

Here you can capture all the information related to the matter, such as the matter's description, client, related people, dates information, etc...

On this screen, you can effortlessly modify any general information by directly editing the fields. You can easily update workflow statuses to align with your matter process. Assigning the matter to a specific user, setting privacy preferences, and recording important developments or updates are all straightforward tasks. You also have the option to add a timestamp for easy reference.



Learn more about managing matters workflow [here](#).

MO0000229

Legal Opinion on Purchase Agreement for BLP

Matter - Corporate Matter

Done

In Progress

Save

Actions

General Info

Custom Fields

External Advisor

Related Contributors

Notes

History

Tasks

Reminders

Emails New

Related Advisor Tasks

Bills

Attachments

Expenses

Time Entries

Matters

Contracts & Documents

Settings

Trust

7,520.00 USD

Paid

2,100.00 USD

Due

0.00 USD

Billable

0.00 USD

General Info

Name *

Legal Opinion on Purchase Agreement for BLP

Practice Area *

Agreement

Workflow Status

Pending Internally

Workflow used

Legal Team Review

Internal Ref Number

253

Matter Container

BLP Matters

Matter Priority

Medium

Stage

None

Client Name

BLP industry

Value (USD)

0

Description

This legal opinion pertains to a purchase agreement governing the rights and obligations of our organization. The legal team reviews the agreement's provisions regarding intellectual property rights, territory, fees, marketing obligations, and termination rights. The opinion provides insights on the legal implications, risks, and recommended modifications to safeguard our organization's interests and comply with franchise regulations.

Important Development

[2023-05-2 15:47:00]: Settlement Negotiations Reached

[2023-05-10 23:24:37]: Meeting with BLP team for discussion

People

Assigned Team

All Teams

Assignee

Alice Jones

Referred By

Start typing

Requested By

Peter Young

Company Name

Privacy

Shared With

Set as Private

Everyone

Date & Times

Arrival Date *

2023-05-22

Additionally, **Custom Fields** offer a way to include additional information when no predefined fields are available. They allow you to customize and add specific data points that are relevant to your needs or unique requirements.

From the matter's page, fill out your custom fields that have been defined previously.



Learn more about how to create custom fields [here](#).

M M00000229 Legal Opinion on Purchase Agreement for BLP
Matter - Corporate Matter

Done In Progress Save Actions

General Info

- Custom Fields
- External Advisor
- Related Contributors
- Notes
- History
- Tasks
- Reminders
- Emails **New**
- Related Advisor Tasks
- Bills
- Attachments
- Expenses
- Time Entries
- Matters
- Contracts & Documents
- Settings

[2023-05-2 15:47:00]: Settlement Negotiations Reached
[2023-05-10 23:24:37]: Meeting with BLP team for discussion

Add Timestamp

Status Comments

Custom Fields

Name of First Party Statement of Acco...
Custom Field Department Choose
Billing Arrangement

External Advisor

Date & Times

Arrival Date 2023-05-22
Filed on 2023-05-22
Due Date 2023-08-31
Closed On YYYY-MM-DD
Estimated Effort
Effective Effort... 3h 30m
Date & Time YYYY-MM-DD HH:MM

Related Companies + Add New

BLP industry

Persons + Add New

No related Person found; Click to Add "Person"

For efficient collaboration, you can outsource this matter to external Legal Practitioners, and mention the contributors working on the matter if any.



Learn more about how to outsource your matters and communicate with advisors on matters [here](#).

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Matter - Corporate Matter

Done In Progress Save Actions

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- Settings

External Advisor

Add Save Cancel

Company	External Advisors	Rate per hour
Common Law	Micheal Cav (michealcav30@gmail.com) (Licensed)	200.00

Related Contributors

Add Save Cancel

Notes

All threads Notes Emails

Add Note

All Threads Expand All / Collapse All

Micheal Cavino added a note on 2023-05-23 09:27

Hi Carolina, You can find the details of the matter below. This Agreement has been entered into on the date of 5/3/2023 and is by and with the Branding Company. For purposes of this Agreement, "Confidential Information" shall include all information or material that has or could have commercial value or other utility in the business in which the Disclosing Party is engaged. If Confidential Information is in written form, the Disclosing Party shall label or stamp the materials with the word "Confidential" or some similar warning. If Confidential Information is transmitted orally, the Disclosing Party shall promptly provide a written indicating that such oral communication constituted Confidential Information.

Use the **Notes** section, to record all noteworthy updates on matters. You can record important information, including updates, by mentioning your team members to keep them informed.

M00000229 Legal Opinion on Purchase Agreement for BLP
Matter - Corporate Matter

Done In Progress Save Actions

General Info

Custom Fields

External Advisor

Related Contributors

Notes

History

Tasks

Reminders

Emails **Now**

Related Advisor Tasks

Bills

Attachments

Expenses

Time Entries

Matters

Contracts & Documents

Settings

All threads Notes Emails

Add Note

All Threads

Expand All / Collapse All

Carolina Robinson added a note on 2023-06-16 09:27 URL's (0) 0 Document(s)

@Alice Jones Please make sure to add the latest update

Micheal Cavino added a note on 2023-05-23 09:27

Carolina Robinson added a note on 2023-05-23 09:08

Carolina Robinson added a note on 2023-05-22 16:15 URL's (0) 1 Document(s)

Micheal Cav (Advisor Portal) added a note on 2023-05-22 13:14 URL's (0) 0 Document(s)

Total Records: 5

History

Additionally, you can attach related documents directly within the internal notes.

Alternatively, you can save copies of relevant emails as notes using Outlook or Gmail Connect. This ensures comprehensive and centralized documentation of matter-related communications and updates.

Add Note

Added By * Carolina Robinson

Added On * 2023-06-16

☒ Visible from Client Portal ☒ Visible from Advisor Portal

Note *

Normal B I U [Link] [Undo] [Redo] [Fullscreen]

@Alice Jones Please make sure to add the latest update

+ Add URL

Attach File

Add more

Save Cancel

App4Legal Connect fo...

Note

Note Details

Log Email as a Note into:

☒ Matter ☐ Contract

Matter * [M229] Legal Opinion o...

Note

BODY IMAGES HEADER TIME-STAMP TEXT

T B I U [Link] [Undo] [Redo] [Fullscreen]

Hi Team You can find the translated document attachedPlease note that

SAVE

In the end, you have the **History** section designed to monitor and record the modifications made to the primary fields of the Matter, including details about who made the changes and the corresponding timestamps and the matter stages details as well. This report could be exported to Excel.

History

Stages Audit Report

Field Name	Old Value	New Value	Modified On	Modified By	
Practice Area	Administrative	Legal Opinion	2021-01-17 09:39	William Singleton	
Client Name	Bandia Group	Branding Company	2021-01-14 12:41	William Singleton	

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

Thank you!