

How to Manage the Folder Structure In Matters

Objective

- Create or upload files/folders related to a matter
- Manage the attachments (Edit, Share, Set Privacy, Search...)

Steps

Within each Corporate Matter or Litigation Case page, there is a dedicated "Attachments" tab.

This tab serves as a centralized repository for all matter-related attachments, encompassing a wide range of items including contracts, documents, legal files, and more.

The screenshot shows the 'Attachments' tab for a matter titled 'M00000253 Legal Opinion on Service Agreement'. The left sidebar contains navigation options: General Info, Tasks, Reminders, Emails (marked 'New'), Bills, Attachments (highlighted with a red arrow), Expenses, Time Entries, Matters, Contracts & Documents, and Settings. The main area displays a summary of financials: Trust (7,520.00 USD), Paid (0.00 USD), Due (0.00 USD), and Billable (0.00 USD). Below this, there's a section for 'Archived Hard Copies' with tabs for App4Legal Documents, Google Drive, SharePoint, OneDrive, Dropbox, and URL's. The 'App4Legal Documents' tab is active, showing a '+ New' button, an 'Upload' button, and a search bar containing 'Search M253'. A table lists attachments with columns: Name, Type, Status, Keywords, File Size, Added On, Added By, and Modified By. Two items are listed: 'App4Legal for Law Firms- In-house Legal ...' (Word document, 1-Draft, 6.6 kB) and 'Legal Opinion on Service Agreement.eml' (Administrative, 1-Draft, 21.9 kB).

You can start by creating New Folders, Word Documents, Excel, and PowerPoint.

This screenshot is similar to the previous one but highlights the '+ New' button in the 'App4Legal Documents' tab. A red box and arrow point to the dropdown menu that appears when the button is clicked. The menu options are: Folder, Word document, Excel workbook, and PowerPoint presentation.

You can either drag and drop or upload files and folders as well.

M00000253 Legal Opinion on Service Agreement
Matter - Corporate Matter

Trust 7,520.00 USD Paid 0.00 USD Due 0.00 USD Billable 0.00 USD

>Archived Hard Copies

App4Legal Documents Google Drive SharePoint OneDrive Dropbox URL's

+ New Upload

Files Folder

M253

Search M253

Name	Type	Status	Keywords	File Size	Added On	Added By	Modified By
App4Legal for Law Firms- In-house Legal ...		1-Draft		6.6 kB	2023-07-11 14:22...	James Marven	James Marven
Legal Opinion on Service Agreement.eml	Administrative	1-Draft	Added by James ...	21.9 kB	2023-07-11 14:07...	James Marven	James Marven

Once your documents and folders have been added, you can modify them as needed.

The File/Folder can be managed by simply selecting the attachment you want on the grid, and all the actions will be visible at the top of the page.

You can Rename, Move, Open, Delete, Share, and much more:

- **Download:** download the selected document.
- **Rename:** rename the selected document.
- **Open in:** you can open your document in **Word for the web** or **LEXZUR Editor** to do the necessary changes to the document.
- **Move:** move the file to a folder.
- **Copy:** copy the file's link.
- **Share with:** share the file with specific people. You can limit their permissions to editors or viewers.
- **List Versions:** this shows all the version history of the file if it was edited.
- **Show in Advisor Portal:** make this file visible in the Advisor Portal.
- **Show in Client Portal:** make this file visible in the Client Portal.
- **Convert to PDF**
- **Delete**

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

>Archived Hard Copies

App4Legal Documents Google Drive SharePoint OneDrive Dropbox URL's

Download Rename Open in Move Copy Link Share with List versions Hide from Advisor Portal Show in Client Portal

Convert to PDF Delete

M229

1 Selected

Name	Type	Status	Keywords	File Size	Added On	Added By	Modified By
Email Attachments				-	2023-05-23 09:0...	Carolina Robinson	Carolina Robins...
Matter Notes Attachments				-	2023-05-22 16:15...	Carolina Robinson	Carolina Robins...
Business Purchase Agreement.docx		1-Draft		66.3 kB	2023-05-22 18:...	Carolina Robins...	Carolina Robins...
Legal Requests.docx		1-Draft		18.0 kB	2023-06-27 12:41...	Alice Jones	Alice Jones

Files could be opened either using word for the web or LEXZUR Editor a tool that allows users to directly open and modifies different files (Word, Excel, PDF, PowerPoint, etc..).

The Editor will automatically upload a newer version of the document into LEXZUR after saving. You can then see the list of versions this document has, the user who added each version, and the date and time, and you can click on any older version to download it.

Version history			
Versions	Added By	Added On	Actions
1	Carolina Robinson	2023-10-25 11:55:35	Download

Cancel

Folders can also be made private so that only specific people with access can open them or could be shared with external parties.

Therefore, select the folder and choose "**Share with**" from the options on the top.

Add the recipients, the users who will give the access, specify the permission as Editor or just Viewer and choose **Restricted** access.

The recipients could be any external contacts as well.

Share with Recipients

IP00000307_202310241531.docx

Add Recipients

Add people, groups, or email

Maria Dave

Permission

Editor

Viewer

Editor

App4Legal access

Restricted

Only people with access can open the item

MD Maria Dave
maralzeidan@lexzur.com

Editor

Cancel Save

In addition, the smart search tool allows you to search for any document. The search will return all files and folders related to the word you added in the search box.

App4Legal Documents									
Google Drive SharePoint OneDrive Dropbox URL's									
<div> <div>New</div> <div>Upload</div> <div>Search Documents</div> <div>document</div> </div>									
Documents Search results: document									
	Name	Type	Status	Keywords	File Size	Added On	Added By	Modified By	Modified
	Documents				-	2022-02-01 10:33...	Sam Marven	Sam Marven	2022-02-
	Contract_Document_169_202301181121.docx				22.6 kB	2023-01-18 14:09...	James Marven	James Marven	2023-01-
	Document-2023-01-30 093708.docx				6.5 kB	2023-01-30 09:3...	Alice Jones	Alice Jones	2023-01-

Additionally, You can generate your documents based on a predefined template.

Learn more about how to use LEXZUR Document Generator in this [guide](#).

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M00000229 Legal Opinion on Purchase Agreement for BLP

Matter - Corporate Matter

General Info

Tasks

Reminders

Emails New

Related Advisor Tasks

Bills

Attachments

Expenses

Time Entries

Matters

Contracts & Documents

Settings

>Archived Hard Copies

App4Legal DocumentsGoogle DriveSharePointOneDriveDropboxURL's

+ New

Upload


Generate document

Search M229

M229

	Name	Type	Status	Keywords	File Size	Added On	Added By	Modified By
	Email Attachments				-	2023-05-23 09:0...	Carolina Robinson	Carolina Robinso
	Matter Notes Attachments				-	2023-05-22 16:15...	Carolina Robinson	Carolina Robinso
	Business Purchase Agreement.docx		1-Draft		66.3 kB	2023-05-22 18:4...	Carolina Robinson	Carolina Robinso
	Legal Requests.docx		1-Draft		18.0 kB	2023-06-27 12:41...	Alice Jones	Alice Jones

Moreover, LEXZUR 360 Docs is an all-in-one smart and searchable, central repository embedded in LEXZUR. It is used to store all your personal and shared documents on LEXZUR and on other Cloud Document Management Solutions such as Google Drive, One Drive, Dropbox, and SharePoint.

 You must first enable the integration to use LEXZUR 360 Docs. [Learn more here](#)

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

Thank you!