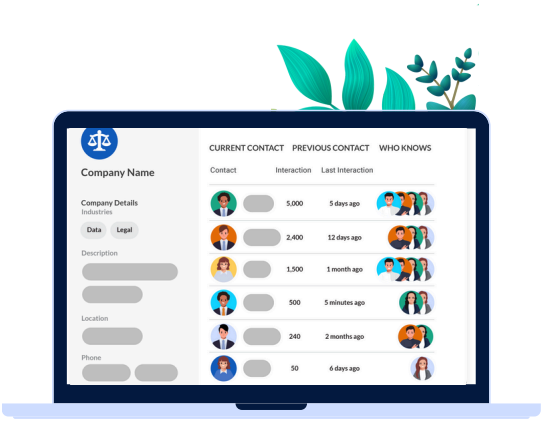
Welcome to Nexl!

Getting started with Nexl

What is Nexl?

Nexl is the Firm's all-in-one CRM, client intelligence, and collaboration platform that will help you stay on top of your key relationships and execute your marketing and business development initiatives.



How Nexl benefits you

- Automatically capture & enrich engagement with your contacts
- Generate valuable relationship insights that drive action
- Empower firm-wide collaboration to get work done

TURNING YOUR RELATIONSHIPS.....

AUTOMATED DATA CAPTURE

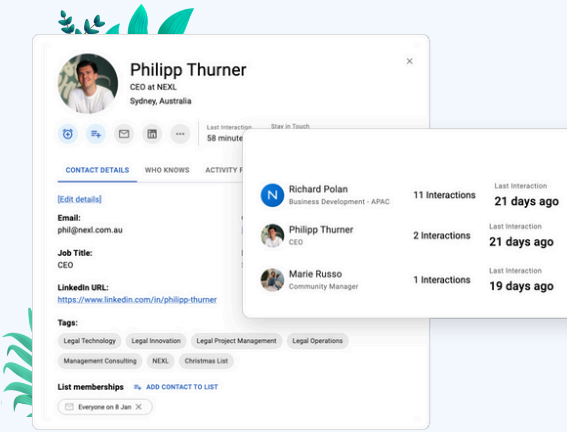
We drastically reduce the manual effort to manage your contacts and relationships. Our automatic data capture and enrichment processes help you and your team to focus on value work.

RELATIONSHIP MANAGEMENT TOOLS

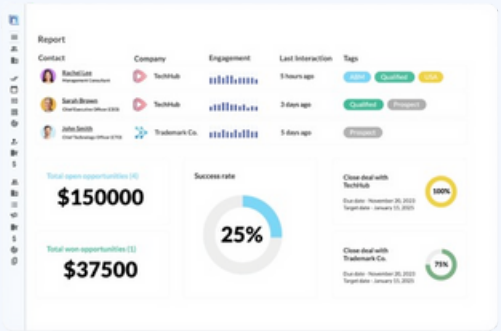
Nexl will help you identify and track the relationships that matter most. With intelligent features, we help you to nurture and stay in touch with your clients, referral sources and prospects.

IDENTIFY NEW CLIENTS AND TARGET PROSPECTS

Nexl gives you access to millions of companies and contacts to empower your business develop plans. By leveraging built-in relationship intelligence, growing your network has never been easier.



.... INTO REVENUE



EASILY MANAGE MARKETING LISTS & EVENTS

Nexl makes it easy to manage lists for your Marketing projects and Events. The system also provides a 360-degree view on all Marketing and BD touchpoints across your contacts and companies.

UNLOCK THE POWER OF COLLABORATION

Unite your team on firm-wide initiatives with Nexl's collaborative Workspaces. Easily create and share lists, business plans, and work towards shared objectives.

TRACK AND CONVERT BUSINESS OPPORTUNITIES

Streamline pipeline management for a comprehensive view of your opportunities. Easily track win rates, prioritize significant deals, and collaborate on your pitches and proposals with ease.

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Getting started

5 easy steps

1. Organize & Segment your Contacts

Browse your contacts, use the "Who Knows" feature to map relationships, and create private lists for key clients or events. Use filters and tags to easily segment and track engagement.

>> View My Contacts

2. Set Stay-in-Touch Reminders

Prioritize your top 5–10 contacts and set reminders to follow up, ensuring you stay connected with your most valuable relationships.

>> Learn more about Stay-in-touch Reminders

3. Explore Company Insights

Dive into company profiles to uncover key connections, cross-selling opportunities, and recent marketing or BD activities.

>> Explore All Companies

4. Log Notes & Activities

Keep important details like client birthdays, meeting notes, and new opportunities organized in one place for easy access.

>> Learn how to add notes to Contacts and Companies

5. Manage Business Opportunities

Get better at converting business opportunities into new revenue by streamlining proposal tracking.

>> Log your first Opportunity on Nexl!

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Getting Started with Nexl

How to log in and find your way on the web client.

Where can I find Nexl?

Nexl is an online SaaS (Software as a Service) application, fully integrated with our Office 365 environment.

Users can access the web version Nexl from:

- the Start button on their PC, or
- by navigating to https://us.nexl.cloud in any browser (Google Chrome, Apple Safari, Microsoft Edge)

How do I log in?

- Access to Nexl is managed by your existing username (your email address) and private password for Microsoft (your Outlook). No additional usernames or password are needed
- When working remote, log into Citrix first, then access Nexl from the Start menu or opening your browser in the Citrix environment.

What's on the Menu?

PERSONAL

Automated lists of contacts and companies you have have engaged with by email or meetings.

PRODUCTIVITY

A handy suite of tools to keep track of tasks, meetings objectives. You'll also find Workspaces and Apps that enable collaboration.

PIPELINE

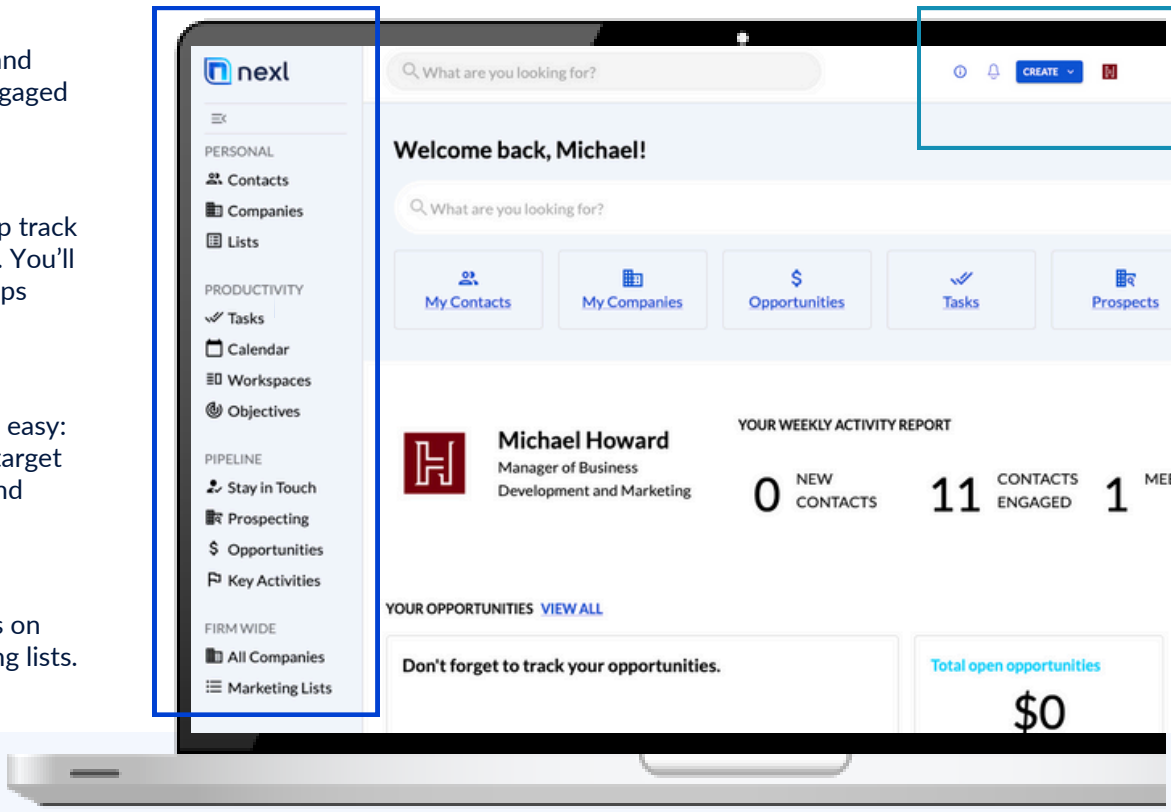
Business Development made easy: stay in touch, focus on your target and manage your activities and opportunities here.

FIRM WIDE

Easy access to All Companies on Nexl and firm-wide Marketing lists.

TOP NAVIGATION BAR

Quick access to search, and shortcuts to add tasks, opportunities, contacts, or companies in one click.



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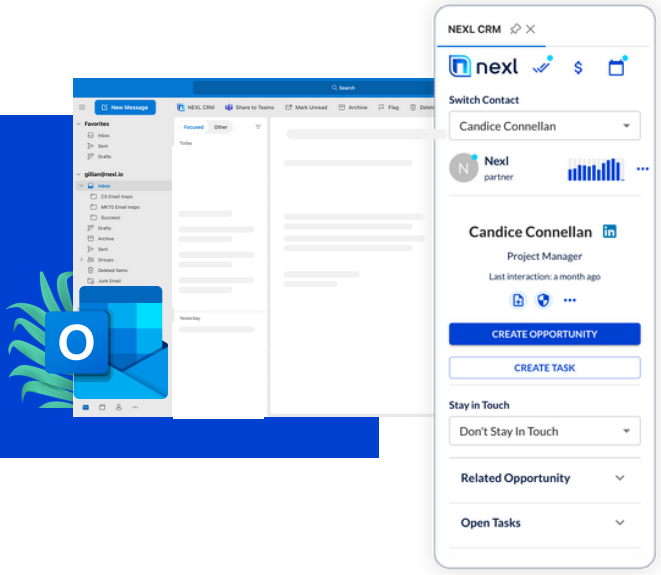
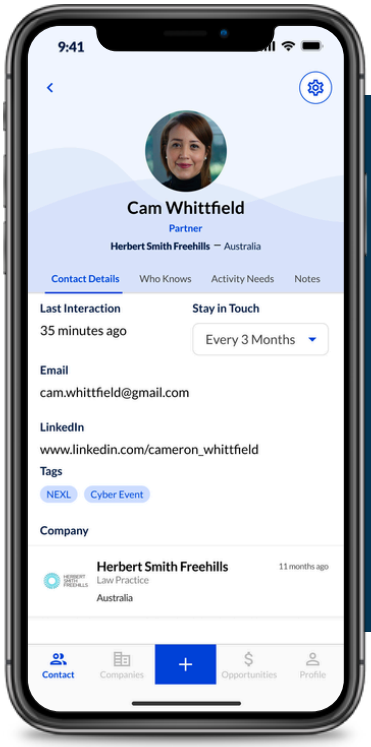
Getting Started with Nexl

How to access the outlook add-in and mobile application.

Can I access Nexl from my inbox?

Yes, you can! Designed for busy lawyers, Nexl's Outlook add-in offers users easy access to data on Nexl. You can also add contacts to Marketing lists, log activities and opportunities, straight from your inbox!
>> Learn more about Nexl's Outlook add-in





Access all your contacts from our mobile app. See who knows whom across the firm and prepare for client meetings on the go. With automated Taxi reports on your contacts and companies, Nexl's mobile app will help you show up smarter.

>> Download from the App store or Google Play (scan QR codes)

Download on the App Store

GET IT ON Google Play

Help!

For any questions or issues, please contact your IT helpdesk or a member of the Marketing & BD team.

You can also visit Nexl's online Help Center to find detailed articles and how-to guides on all features and functions >> Visit Nexl's Help Center

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