How to Customize Matter Email Templates

Objectives:

• Create Matter Email templates, predefine the Subject, Message, etc....

Steps:

Users can now Customize the email templates for sending emails in Matters, Cases, Invoices, and Contracts.

You can create multiple variations, personalize subjects and messages, and add custom fields and recipient information according to your preferences.

To initiate this customization process, navigate to the System Settings Email Templates in the Matters section

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		 System Settings Billing and Plan
		Manage Users Add User
Se Matters		Apps Marketplace
Matter Client Positions		
Matters Success Probabilities		
Matter Company Roles		
Matter Person Roles		
Matter Container Statuses		
Stages		
Practice Areas & Due Dates		
Assignment Rules		
Custom Fields		
Matter Value Tiers		
Manage Workflows		
SLA Management		
Event Types		
Email Templates		

Here, you can efficiently manage your matter email templates and create new ones.

Settings / Email Templates	
Email Templates - Matter	© 0
Title	Subject
MATTER TEMPLATE EMAIL	{{description}}
Consultation Updates	{{description}}
© Corporate Template	Corporate Matter
	{(case_id)}

To create a new template, simply provide the template with a distinctive name, specify the subject and message for your email, and identify the CC recipients.

Femplate Name *	
Matter Updates	
Subject *	
{subject} Updates	?
20	
сс с	
Content *	Bcc
ち (→ Paragraph × B I 王 王 王 王 王 上 ▲ × A × Insert Placeholders ×	
Dear {{client_name}},	
Kindly find below the latest development on the Matter {{subject}}	
{{latest_development}}	
{(latest_development)} {(statusComments}) {(status))	
{(latest_development)} {(statusComments)}	
{(latest_development)} {(statusComments}) {(status))	
{(latest_development)} {(statusComments}) {(status))	

Additionally, you have the flexibility to insert any matter fields and custom fields directly into the message content using placeholders.

Later, when composing a new email from the Emails tab in a matter, you will be prompted to choose the template you wish to utilize.

M00000481 Legal opinion Matter - Corporate Matter	on Consultancy Agreement	
Matter - Corporate Matter General Info Tasks Reminders Emails Now Bills Attachments Expenses Time Entries Invoices	Compose Q. Search All Conversations	No emails
Matters Contracts & Documents Settings		

This streamlined approach ensures that all necessary information is automatically filled in with minimal effort on your part.

You can then add the recipient of the email, modify your message, and attach any files if needed.

New Message	
Matter Updates	+Add
то	TAU
Legal opinion on Consultancy Agreement Updates	~
Dear BLP industry, Kindly find below the latest development on the Matter Lega [2023-08-11 10:58:21]: Research and Setting Requirements [2023-08-11 11:01:44]: Negotiation completed	
Matter is under Review	
Best regards	

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

Thank you!