

How to Customize Matter Email Templates

Objectives:

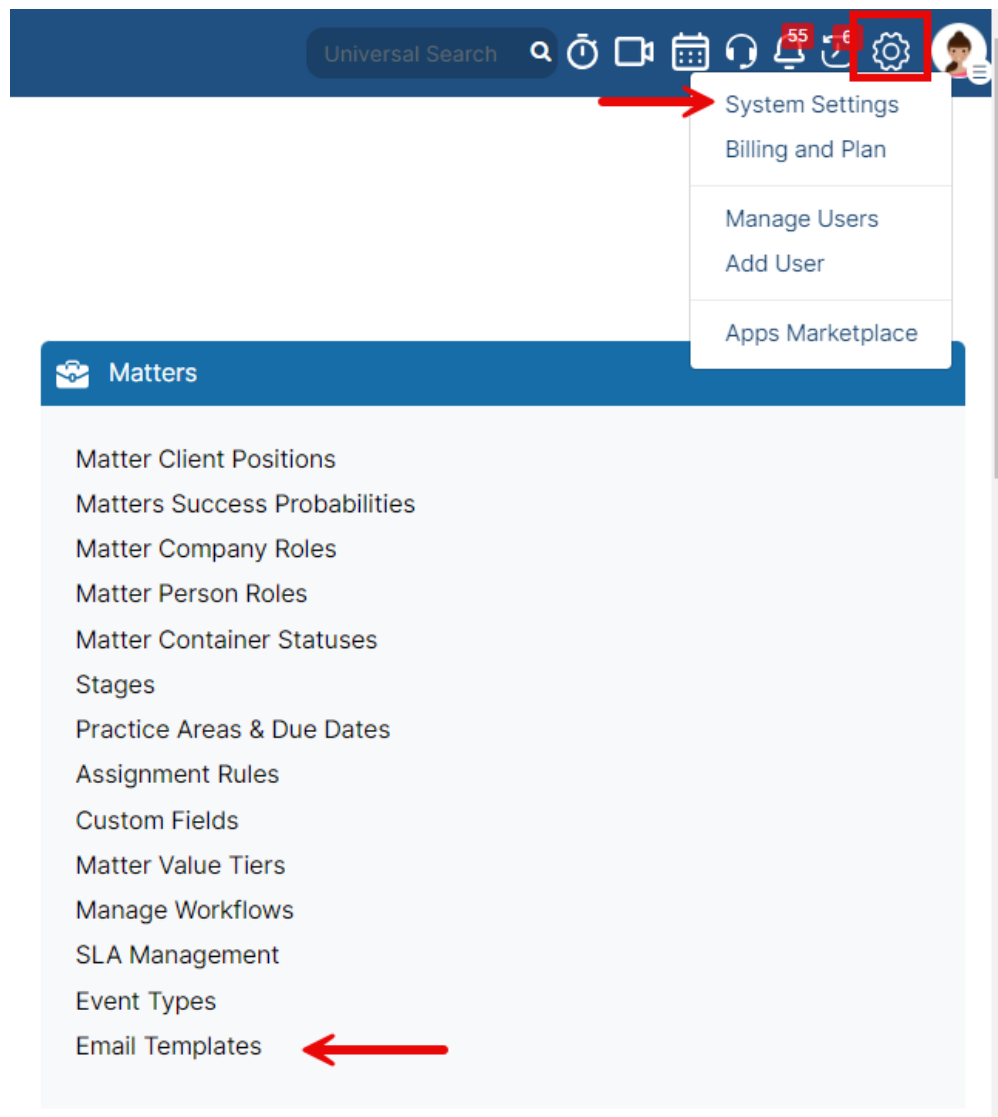
- Create Matter Email templates, predefine the Subject, Message, etc....

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



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



Add Template

Template Name *
Matter Updates

Subject *
{{subject}} Updates

Cc

Content *

Paragraph B I [List Icons] [Link Icon] [Undo] [Redo] **Insert Placeholders**

Dear {{client_name}},

Kindly find below the latest development on the Matter {{subject}}

{{latest_development}}

{{statusComments}}

{{status}}

Best regards,

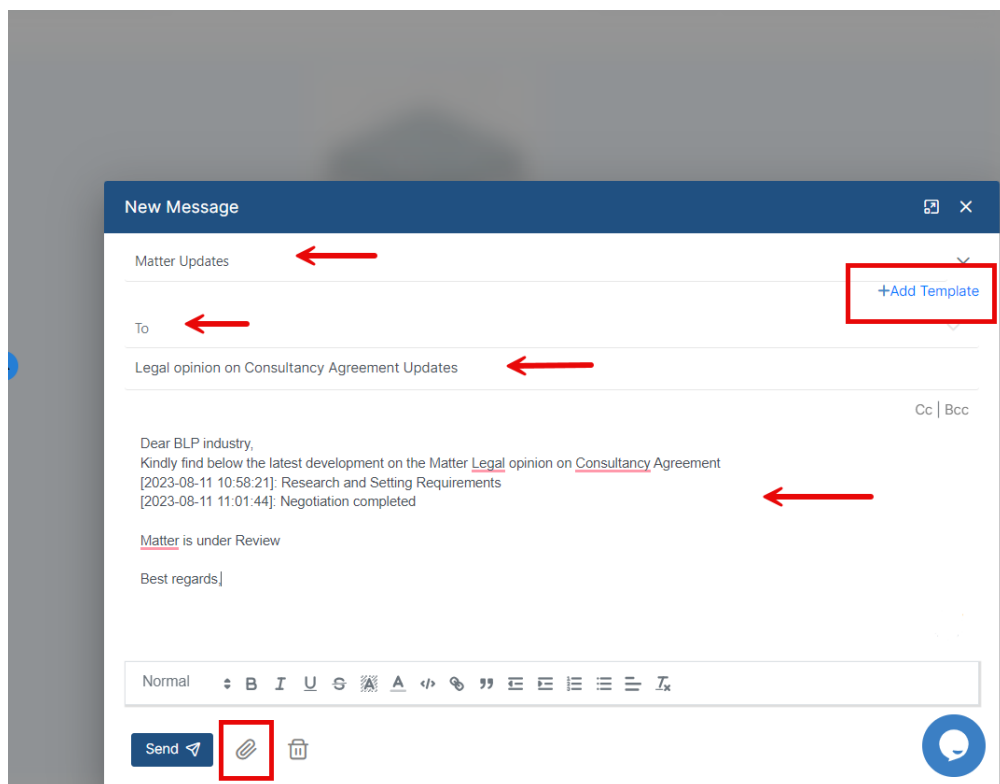
Cancel **Save**

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.

A screenshot of the Gmail interface. On the left is a vertical sidebar menu with icons and labels for 'General Info', 'Tasks', 'Reminders', 'Emails', 'Bills', 'Attachments', 'Expenses', 'Time Entries', 'Invoices', 'Matters', 'Contracts & Documents', and 'Settings'. The 'Emails' item is highlighted with a blue background and has a small red 'New' badge next to it. On the right, the main area shows a 'Compose' button at the top, highlighted with a red box, and a search bar below it with the text 'Search All Conversations'.

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.



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

Thank you!