How to Customize Litigation Cases Email Templates

Objectives:

• Create Litigation Case Email templates, predefine the Subject, Message, etc....

Steps:

Users can now customize the email templates for sending emails in Cases, Matters, 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 Litigation Stages section.

L=XZUR Dashboards - Agile - Contacts - Matter	rs • Tasks Contracts & Documents • Reports • Time • Billing • More • Create +	Universal Search) <mark>کې ^ست لیک (</mark> الله الله ال
Custom Fields		Stages	System Settings
Company Asset Types	a Tasks	Practice Areas & Due Dates	Billing and Plan
Company Assets Custom Fields		Assignment Rules	Manage Users
Company Relation Types	Task Types	Custom Fields	Add User
Licenses and Waivers Permissions	Task Assignment Rules	Matter Value Tiers	Add Oser
	Workflow Statuses	Manage Workflows	Apps Marketplace
	Locations	SLA Management	
▲ Litigation Stages	Custom Fields	Event Types	
	Manage Workflows	Email Templates	
Court Types			
Court Degrees / Circuits			
Court Regions	Meetings	Contracts & Documents	
Courts	11 Weetings		
Hearing Types	Locations	ID Configuration	
Reason of Win or Lose	Meeting Types	Types	
Stage Statuses		Sub types	
Opponent Positions		Boards	
Email Templates	Ö. Time Fatrice	Party Categories	
	Ō Time Entries	Manage Workflows	
	Categories	Templates	
3 Reminders	Internal Statuses	Upload Contract/Document Forms	
S Reminders	Manage non-business days	Approval Center	
Reminder Types	Wanage non-business days	Signature Center	
		Custom Fields	
		Applicable Laws	
	Users & Permissions	Attachment Status	

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

Settings / Email Templates		
Email Templates - Litigation Case		0 🛨
Title	Subject	
🛞 Dispute Email	Litigation	
 ✔ Edit ☐ Delete 		\ll \langle 1 \rangle \gg 1-1 of 1 items 10 \checkmark

6

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.

dd Template		
Template Nam	ie *	
Case Update	s 🔸	
Subject *		
{{subject}} U	odates	?
Cc		
Cc 🔶		
		Bcc
Content *		
~ ك	Paragraph ∨ B I ≡ ≡ ≡ ∷ ∷ ∷ ∠ ∨ A ∨ Insert Placeholders ∨	
Dear {{clie	ent_name}},	
Kindly fin	d below the latest development on the case {{subject}}:	
{{latest_de	evelopment}}	
{{status} Co	omments}}	
([statusee	(initial states)	
{{status}}	inner oj	
{{status}}	rds,	incel 🗸 Save

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

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

M00000139 Client Sure x B Matter - Litigation Case @ General Info Stages & Activities Emails New		
Bills		• • •
Expenses Time Entries		No emails
 Invoices Matters 		
Contracts & Documents		
🗯 Settings		
The first time you	click on compose, you will be asked to in	tegrate with Gmail or Office 365 and log in to your account.

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.

Case Updates	
	+Add Te
To	
Client Sure x Bcompany Updates	
	Cc
Dear <u>Client</u> <u>Sure</u>	
Kindly find below the latest development on the case Client Sure x Bcompany:	
4-In Progress	-
Best regards,	
Normal 💠 B I U 응 🌋 🔺 🚸 🗞 패 프 프 듣 듣 🗄 🛣	

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

Thank you!