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.
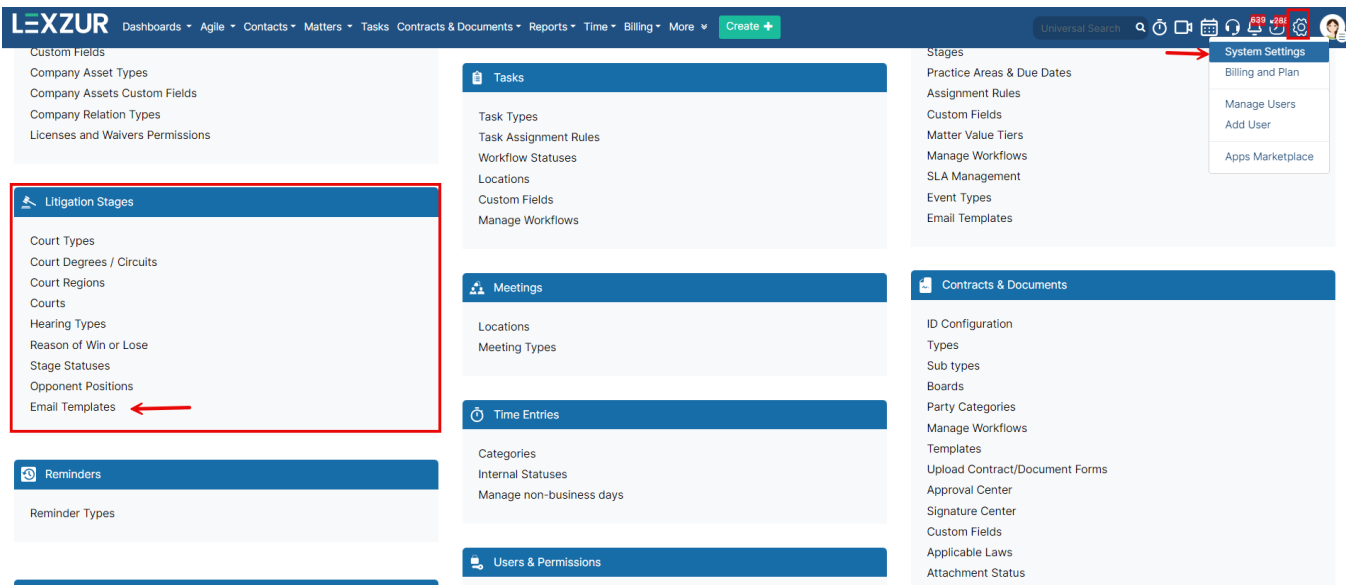
Here, you can efficiently manage your case email templates and create new ones.
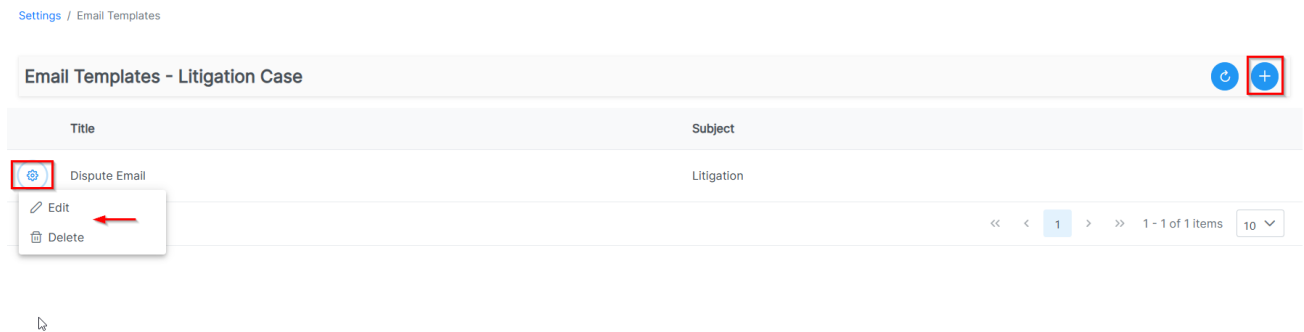
To create a new template, simply provide the template with a distinctive name, specify the subject and message for your email, and identify the CC recipients.

Add Template   ✕

Template Name *

Case Updates   ←

Subject *

{{subject}} Updates   ←   ⑦

Cc

Cc   ←   ⌄

Content *   Bcc

↶ ↷   Paragraph   ⌄   **B** *I*   ≡ ≡ ≡   ☰ ☰   ✎ ⌄ **A** ⌄ | Insert Placeholders ⌄ |

Dear {{client_name}},

Kindly find below the latest development on the case {{subject}}:   ←

{{latest_development}}
{{statusComments}}
{{status}}

Best regards,

Cancel   ✓ 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.

L   M00000139 Client Sure x Bcompany
        Matter - Litigation Case   ◈

🗂 General Info

🏛 Stages & Activities

✉ Emails [New]

▊ Bills

🗄 Attachments

Ⓔ Expenses

⏱ Time Entries

📄 Invoices

⚖ Matters

📝 Contracts & Documents

⚙ Settings

Compose

🔍 Search All Conversations

No emails

⚠ The first time you click on compose, you will be asked to integrate 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.

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

Thank you!