

How to send Emails from Corporate Matters and Litigation Cases

Objectives

- Send Direct Emails from Matters

Steps

An Email Engine is available in Contra, Corporate Matters, Litigation cases, Intellectual Properties, and Invoices so the users will be able to send and receive emails from within the system and track all the email conversations in one place.

To send emails and attach related matter documents directly from LEXZUR:

From the Corporate Matter or Litigation Case page, open the matter you want by clicking on its name or ID.

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Corporate Matters

All

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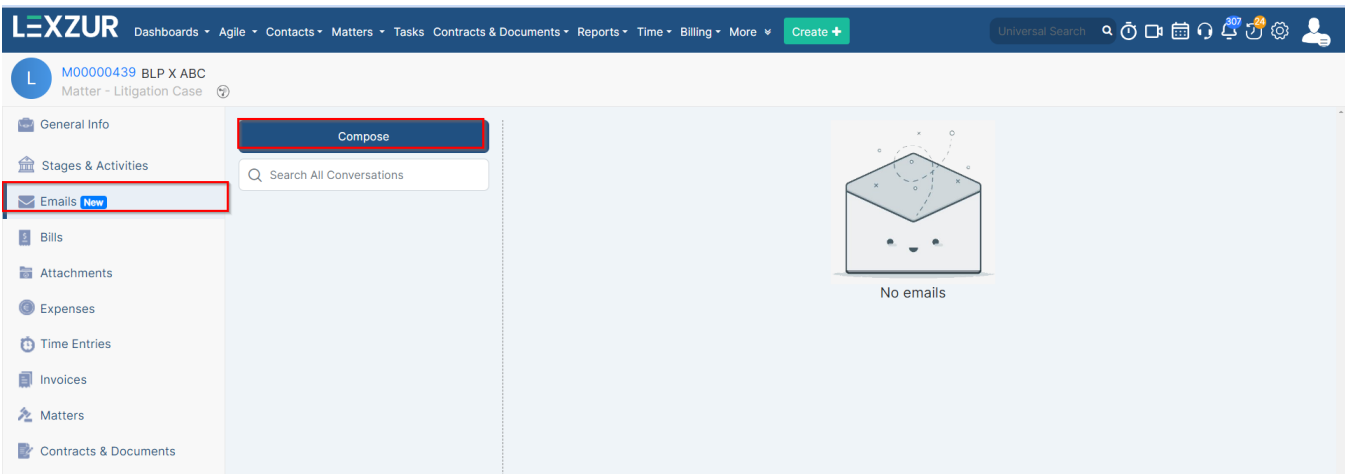
Search

Advanced

Columns

<input type="checkbox"/>	ID	Assignee	Client Name	Name	Practice Area	Workflow Status	Important Development	Requested by	Value	Assigned Team	Arrival Date	Due Date
<input type="checkbox"/>	M00000334	Carolina Robinson	Brand Line Company	Legal Advice on Purchase Agreement	Acquisition	In Progress	[2023-12-01 16:21:26]: legal research...	Alice Jones	0.00	All Teams	2023-12-01	
<input type="checkbox"/>	M00000330	Carolina Robinson	Adam Skins	Legal Advice for Adam	Commercial	In Progress	[2023-11-27 11:38:18]: Matter in...	Julia Marven	0.00	All Teams	2023-11-28	
<input type="checkbox"/>	M00000328	Jimmy Peterson	Anna Robin	Legal Consultation for Paul Jones	Consultation	Under Review	[2023-11-21 10:40:47]: matter under...	Micheal Cavin	0.00	All Teams	2023-11-21	
<input type="checkbox"/>	M00000327	Alvah Zarzour (Inactive)	Maria Smith	legal advice	Consultation	Open			0.00	All Teams	2023-11-20	
<input type="checkbox"/>	M00000326	Carolina Robinson	Albert Company	Legal Advice for Albert	Real Estate	In Progress	[2023-11-09 11:02:05]: Matter reviewed and we...		0.00	All Teams	2023-11-02	
<input type="checkbox"/>	M00000324	Carolina Robinson	Alice Jones	Legal Advice on Purchase Agreement	Agreement	In Progress	[2023-11-07 13:07:06]: we met with the client 123	Alice Jones	0.00	All Teams	2023-11-07	
<input type="checkbox"/>	M00000322	Carolina Robinson	Maria Smith	test	Civil	Open			0.00	All Teams	2023-11-07	
<input type="checkbox"/>	M00000319	Carolina Robinson	Advanced Industries	legal advice for Advanced Industries	Agreement	In Progress	[2023-11-03 16:18:54]: finalizing 123		0.00	All Teams	2023-11-03	
<input type="checkbox"/>	M00000313	Carolina Robinson	BLPC	Legal Advice on Purchase Agreement	Agreement	3-Closed		Alice Jones	0.00	All Teams	2023-10-27	

All emails related to this specific matter can be sent and tracked under the **Emails** tab on the matter's page.



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Universal Search

L

M00000439 BLP X ABC

Matter - Litigation Case

General Info

Stages & Activities

Emails New

Bills

Attachments

Expenses

Time Entries

Invoices

Matters

Contracts & Documents

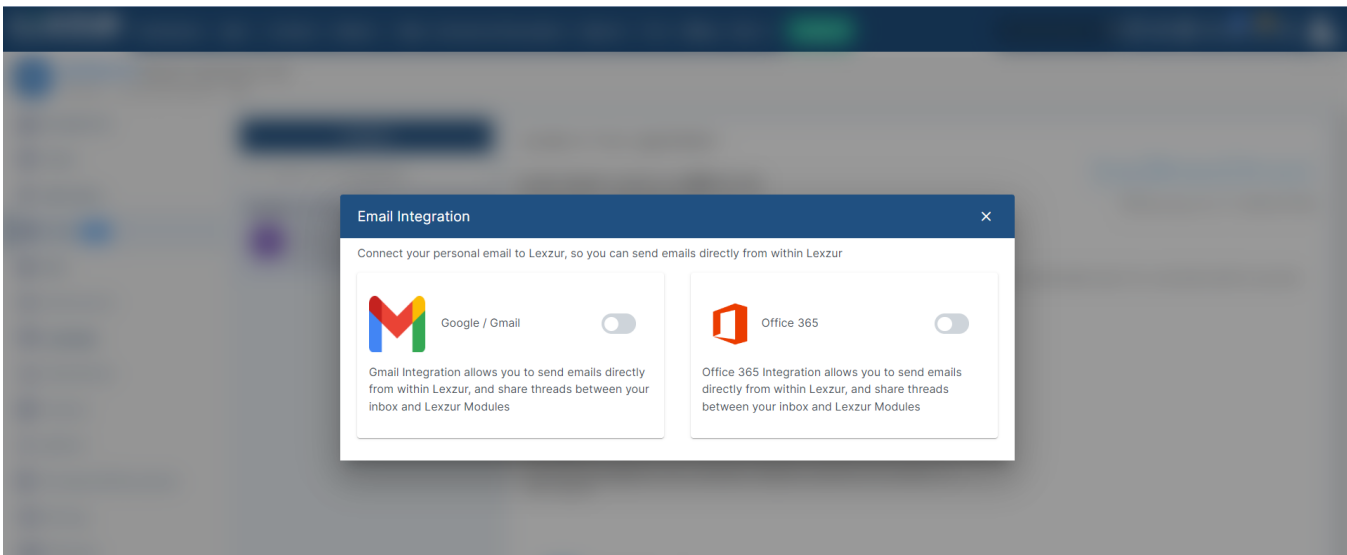
Compose

Search All Conversations

No emails

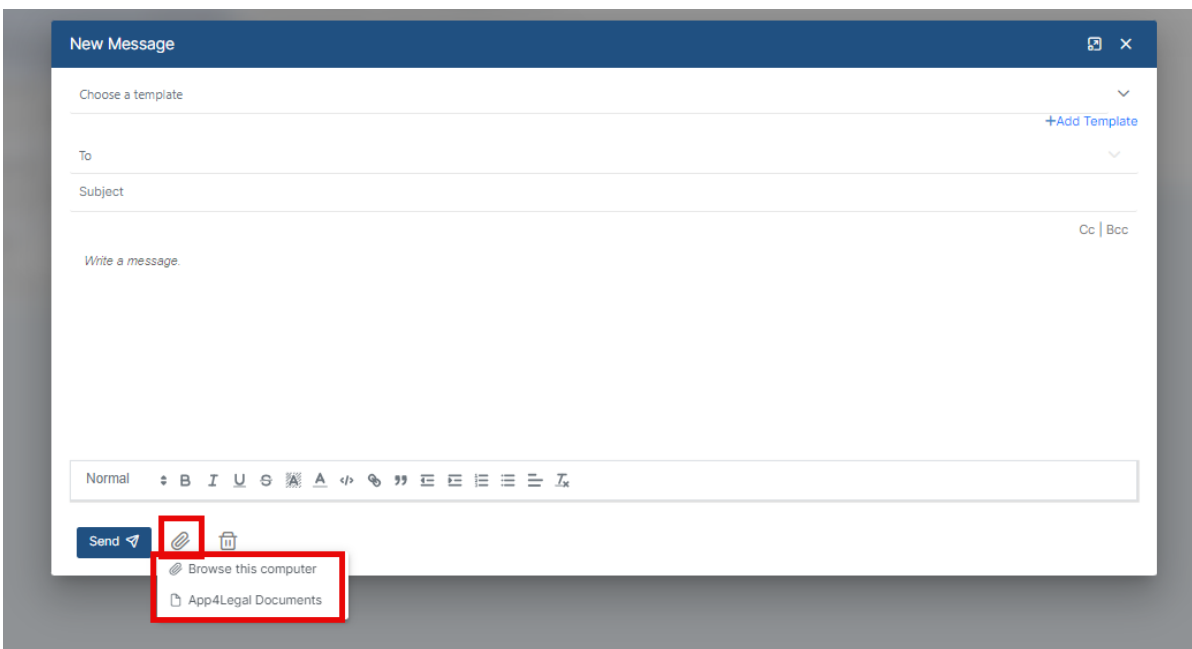
Click on **Compose** to start a new message.

First, connect your email to Lexzur. Choose either Gmail or Office 365, and sign in with your email address



Your client's email will be automatically retrieved if it is already included under the client's general information.

Choose the subject of your email and the message you wish to send, then click the attach button to attach either a file from your computer or any Lexzur Documents.



Choose the Folder from which you want to select your files, select the documents, and press **Attach**.

Moreover, you can create and use email templates to increase efficiency and standardize emails sent from the system.

 Learn how to customize matter email templates from [here](#)

All the related emails will be then tracked on the matter's page, and you can also take direct actions from here such as **Reply**, **Reply All**, or **Forward** the Email.

M

M00000334 Legal Advice on Purchase Agreement for BLC

Matter - Corporate Matter

General Info

Tasks

Reminders

Emails New

Bills

Attachments

Expenses

Time Entries

Invoices

Matters

Contracts & Documents

Settings

Financial

Compose

Search All Conversations

Matter updates

Dec 01, 2023

C

Caroline Mrawed

<caroline.moraod@lexzur.com>

To: Caroline Mrawed <caroline.moraod@lexzur.co...>

Re: Legal Advice on Purchas...

Oct 10, 2023

C

Caroline Al Mrawed

<caroline.moraod@app4legal.com>

To: Alice Jones <jonesalice21@gmail.com>

Re: Legal Advice on Purchas...

Oct 10, 2023

C

Caroline Al Mrawed

<caroline.moraod@app4legal.com>

To: Alice Jones <jonesalice21@gmail.com>

Legal Advice on Purchase A...

Mar 31, 2023

A

Alice Jones <jonesalice21@gmail.com>

To: Caroline Mrawed <caroline.moraod@lexzur.co...>

Legal Advice on Purchase Agreement

Alice Jones <jonesalice21@gmail.com>

To: Caroline Mrawed <caroline.moraod@lexzur.com>

Friday, Mar 31, 2023, 10:12 AM

Reply

Reply All

Forward

Hi Carolina,

You can find the details of the matter below

This Agreement has been entered into on the date of 5/3/2023 and is by and with the Branding Company

For purposes of this Agreement, "Confidential Information" shall include all information or material that has or could have commercial value or other utility in the business in which the Disclosing Party is engaged. If Confidential Information is in written form, the Disclosing Party shall label or stamp the materials with the word "Confidential" or some similar warning. If Confidential Information is transmitted orally, the Disclosing Party shall promptly provide a written indicating that such oral communication constituted Confidential Information.

ASSET PURCHASE ...

62.3 KB

Sales Contract.pdf

1.2 KB

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

Thank you!