How to Use Teams Connect

Objectives

- Create Channels for Matters/Contracts/Hearings from Teams
- Access Teams directly from the Matter/Contract page in Lexzur.
- Invite Members, initiate conversations and schedule meetings
- Track Matters/Contracts/Hearing Details within the Teams channel, manage files, and store conversations as notes.

Steps

Once logged in, you will be able to use the add-on and benefit from its features.

How to use it?

To access Teams Connect, you have two options.

1-First, from Microsoft Teams, open the App4Legal tab, choose the desired module, and search for matters.

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Calendar		LEXZUR		Carolina Robinson 👷 🔓 Sign Out	
Chat			Select a Matter to start a meeting		
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S Calls		Matter name	M31: Acquisition for Advanced industries by Fred Moriss		
Files			Q. Search		
App4Legal					
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The current version of the add-on consists of four main tabs. Three tabs are dedicated to creating channels under Lexzur teams automatically upon channel creation and member selection. The fourth tab functions as the settings tab, providing users with customizable options and defaults.

The supported modules include:

- Corporate Matter
- Litigation Case
- Hearing
- Contract

LEXZUR teams corresponding to these modules are:

- LEXZUR-Corporate Matter
- LEXZUR-Litigation Case
- LEXZUR-Hearing
- LEXZUR-Contract

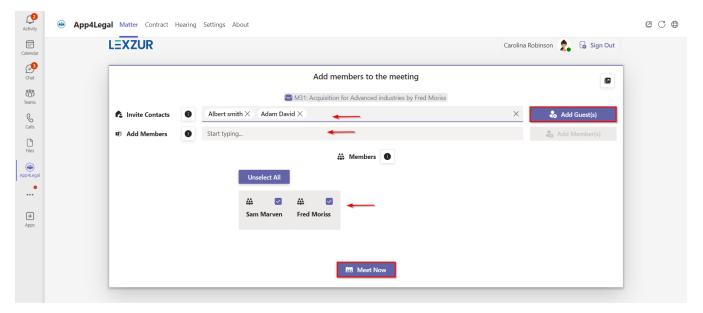
To create a channel related to any module, click on one of the three mentioned tabs. Then, select the intended issue in the Search box, and click Search.

2- Alternatively, within the Lexzur app, navigate to the Matter/Case or Contract page and click on the "**Meet now**" option within the People section. This action opens Teams Connect and searches for any related channels for that specific matter. Individuals mentioned on the matter page are automatically added as suggested members to that channel. You can then modify the membership by adding or removing members as needed.

EXZUR Dashboards	- Agile - Contacts - Matters -	Tasks Contracts & Documents ▼ Reports ▼ Time ▼	Billing - More + Create +			versal Search 🔍 🤄) 🗅 🛱 🖸 🛱	° 🖑 😳
M00000031 Acquisition Matter - Corporate Mat	n for Advanced industries by Fred tter 💮	Moriss		Done In Progress	Open	More 👻 🏌	Save	₽ Actions
General Info	main Trust	19,500.01 USD 🐻 Paid	11,100.00 USD	Due	2,017.60 USD	📖 Billable		
Custom Fields External Advisor Related Contributors	General Info					People	Zoom	i Meet Now
Notes	Name *	Acquisition for Advanced industries by Fred Mori	Practice Area * 🖶	Acquisition	•	Assigned Team	All Teams	*
History	Workflow Status	Closed	Workflow used	System Workflow (default)	1	Assignee	Sam Marven	-
Reminders	Internal Ref Number		Matter Container	Start typing	Q	Referred By	Start typing	Q
Emails New	Matter Priority	¥ Low →	Stage 🕂	None		Requested By	Fred Moriss	Q
Bills	Client Name 🗷	Advanced Industries	Value (USD)	500		Company Name		Q,
Attachments	Description ?					Approved by:		Q

If it's the first time using the add-on or no team of the issue type is found, the add-on will create a new team, adding the legal member of the organization automatically.

Otherwise, it will search for an existing channel for the same issue. If found, the user can choose the related channel or create a new one. If not, the addon moves to the next screen for channel member selection.



In the "Add members to the meeting" page, you have the following options:

1. Invite External contacts as guests to the channel.

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2. Add members from the organization to the channel.

3. Select any related contacts to the current issue (matter, litigation, hearing, or contract) to be present in the channel.

"External" means not directly related to the issue.

Search for any external contacts that need inclusion in the channel and press the Add button. Repeat the process for adding organization members.

After finishing the selection of channel members, press the **Meet Now** button. Simultaneously, the add-on will create the channel, add members, invite guests if any, and prepare the environment.

Upon completion of channel creation, the add-on will automatically redirect you to the new channel.

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▼ ac	Lexzur			Caroline Mrawed 12:43 PM	📑 Meet now 🔚
	General			Caloline Mildwed 12.45 PM	Schedule a meeting
- 1	Training			This channel is to discuss the Corporate Matter M31 - Acquisition for Advanced industries by Fred Moriss. Click on the title	to open in Lexzur.
	General			w Reply	
- AH	Lexzur Help			• reply	
	General			Caroline Mrawed 12:43 PM	
► LC	Lexzur-Litigation Case				
- AM	Lexzur -Corporate Matter			This channel will be automatically deleted if it was detected idle, which means no messages are sent on it, for more than 14 be restored within 30 days from the team settings.	days. Note: It can
	General				
- LM	Lexzur-Corporate Matter			CM_ Reply	
	General				
	M31- Acquisition for Advanced ind	łu 🗇		CM Caroline Mrawed 12:43 PM	
- u	Lexzur -Litigation Case			Added a new tab "Lexzur" at the top of this channel.	
	General				
▼ CS	Customer Success			CM Reply	
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τ ιc	Lexzur-Litigation Case				
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• н	Lexzur -Hearing			🖸 Start a post	

Here, you have the option to initiate a new conversation within the channel, schedule meetings with the members, and find all files along with pertinent details about matters, cases, or contracts under the Lexzur tab.

M31- Acquisition for	Advanced industri	es by Fred M Posts	Files ~ Lexzur +		Ċ	··· 🖸 🗸		
+ New ∨ ↑ Upload ∨	目 Edit in grid view	🖻 Share 🛛 🕫 Copy lir	nk 🤀 Sync \cdots		\equiv All Documents $ \smallsetminus $	7 (i)		
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🕀 Link								
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+ Add template								
		This folder	is empty					

The add-on will introduce the Lexzur Tab at the top of each newly created channel. This tab allows you to view the matter-related details, you can directly click to manage it in Lexzur and to export channel conversations as notes and files as attachments to the associated case or contract.

M31- Acquisition for Advar	nced industries by Fred M Pos	ts Files Lexzur ~ +	
LEXZUR		Carolina Robinson 👷 🕞	Sign Out
Corporate Matter Details	Manage in Lexzur	Export Conversations Note Note title*	•
General Info Corporate Matter	—		
ID:	0000031	Exportation method	
Subject:	Acquisition for Advanced industries by Fred Moriss	All Conversations Newest Conversations	
Description:			_
Priority:	⊗ Low	Submit	
Workflow Status:	Closed		
Practice Area:	13	Related Documents	0
Stage:			
Value(USD):	500.00	No Files in this Channel	
		Export Files	
Client Company			
Name:	Advanced Industries		
Email:	AdvancedIndustries@gmail.com		
Phone:	+1 6152512569		
Mobile:	+1 6152512569		

After entering a note title, you must choose between All or Newest conversation options.

All conversations entail exporting all channel conversations, while Last updated means exporting only the new or updated conversations. Click the **Submit** button to initiate the process. If successful, a pop-up will display a message confirming the successful exportation along with a hyperlink to the related issue.

To export channel files as attachments to Lexzur servers, select the desired files from the right list and then click the **Export Files** button. A pop-up will appear with a message confirming the successful exportation.

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

Thank you!