# **Managing System Notifications**

## **Objectives:**

• Manage system notifications

## Steps:

Within Lexzur, users receive notifications for various system actions. Consequently, administrators can oversee these notifications, including deactivating them and modifying the users who receive notifications.

To do so, click on the action wheel at the top right of the page: System Settings Notification Scheme under System Preferences.

EXZUR Dashboards - Agile - Contacts - Matters	Tasks Contracts & Documents ▼ Reports ▼ Time ▼ Billing ▼ More ♥ Create +	Universal Search 🔍 Ō 🗗 🛗 🖸 🖉 🞯 🛃
N	💄 Users & Permissions	Attachment Status Billing and Plan
System Maintenance	User Groups Manage Users Import Users from Azure Active Directory User Groups Permissions	Attachment Type Document Generator Templates Fo Folder Templates SLA Management Apps Marketplace
🕈 System Preferences	í User Management Reports	DocuSign integration Email Templates
Setup & Configuration Notification Scheme Look & Feel Integrations Task & Triggers Automation	Users Audit Report Login History Report User Management Report	Intellectual Property     Intellectual Property Rights     IP Classes
Document Content Search (Full Text Search) Custom Integrations Email Customization	ئے, Import Data Companies	IP Subcategories IP Statuses IP Names Petition/Opposition Types
Apps & Configurations	Persons Corporate Matters Intellectual Properties Litigation Cases Matter Containers	Email Templates

You will be redirected to the notification scheme page, where you can manage notifications in simple steps.

You have the option to:

- 1. Exclude Action Maker from notifications: which means that the user who performed the action will not receive notifications.
- 2. Enable attachments in emails for Contracts & Documents

Settings / Notification Scheme			
Iser Notification Scheme			> [:-
Trigger	Notify (To)	Notify (CC)	Exclude Action Maker from notifications Enable attachments in emails for Contracts & Documents
New Litigation Case	Assignee Edit	Matter Creator Edit	Enable attachments in emails for Contracts & Documents
New Corporate Matter	Assignee Edit	Matter Creator Edit	
Add Matter Note	Assignee Add matter contributors Edit	Matter Creator * Note Creator	•
New Intellectual Property	Assignee Edit	Matter Creator Edit	
Edit Litigation Case	Assignee Matter Contributors 🖆 Edit	Matter Creator Edit	•
Edit Matter	Assignee Add matter contributors Edit	Matter Creator(only if Lexzur Use Edit	er)
Edit Intellectual Property	Assignee Edit	Matter Creator Edit	• •

### You can deactivate the email notifications for some triggers.

Settings / Notification Scheme			Į
Trigger	Notify (To)	Notify (CC)	Send Notification by email
New Litigation Case	Assignee Edit	Matter Creator Edit	•
New Corporate Matter	Assignee Edit	Matter Creator Edit	
Add Matter Note	Assignee Add matter contributors Edit	Matter Creator * Note Creator	•
New Intellectual Property	Assignee Edit	Matter Creator Edit	
Edit Litigation Case	Assignee Matter Contributors 🍯 Edit	Matter Creator Edit	•
Edit Matter	Assignee Add matter contributors Edit	Matter Creator(only if Lexzur User) Edit	•
Edit Intellectual Property	Assignee Edit	Matter Creator Edit	•

### Moreover, you have the option to edit the users receiving the notifications by clicking on the Edit button and specifying the emails needed.

Settings / Notification Scheme			
User Notification Scheme			:-
Trigger	Notify (To)	Notify (CC)	Send Notification by email
New Litigation Case	Assignee Edit	Matter Creator Edit	•
New Corporate Matter	Assignee Edit	Matter Creator Edit	•
Add Matter Note	Assignee Add matter contributors Edit	Matter Creator * Note Creator	•
New Intellectual Property	Assignee Edit	Matter Creator Edit	•
Edit Litigation Case	Assignee Matter Contributors 🛍 Edit	Matter Creator Edit	•
Edit Matter	Assignee Add matter contributors Edit	Matter Creator(only if Lexzur User) Edit	•
Edit Intellectual Property	Assignee Edit	Matter Creator Edit	•

In addition, from the same page, you can manage both the client and advisor portal's notification schemes.

Trigger	Notify (To)	Notify (CC)		
Edit Matter Status by Lexzur User	Creator * Requester * Watchers	Edit		
Add Comment to Matter by Lexzur User	Creator * Requester * Watchers	Edit	•	
Share Matter/Matter Container by Lexzur User	Requester * Watchers	Edit		
Share Matter or Contract/Document in Client Portal by Lexzur User with Requester that is not a Client (Sends the password of the automatically created Client account to the Requester)	Requester			
Share Contract/Document in Client Portal by Lexzur User	Requester * Watchers	Edit	•	
Edit Contract/Document Status by Lexzur User	Requester * Watchers Edit	Edit	•	
Send Email to Matter Requester	Requester			
Send Email to Contract Requester	Requester		•	
Advisor Portal Notification Sche				
Advisor Portal Notification Sche		Notify (CC)		
Advisor Portal Notification Sche	Notify (To)	Notify (CC)		
Advisor Portal Notification Sche		Notify (CC) Matter Creator Edit		
Advisor Portal Notification Sche	Notify (To) Advisors	Matter Creator	•	
Advisor Portal Notification Sche Trigger Core User Assigned Case	Notify (To) Advisors Edit Bil Commenters	Matter Creator Edit Bill Creator	•	
Advisor Portal Notification Sche Trigger Core User Assigned Case Add a comment on Bill	Notify (To) Advisors Edit Bill Commenters Edit Bill Commenters	Matter Creator Edit Bill Creator Edit Bill Creator		
Advisor Portal Notification Sche Triger Core User Assigned Case Add a comment on Bill Edit a comment on Bill	Notity (To) Advisors Late Bit Commenters Edit Bit Constructions Hit Constructions Hit Constructions	Matter Creator Edit Bill Creator Edit Bill Creator Edit Bill Creator	•	
Advisor Portal Notification Sche Triger Core User Assigned Case Add a comment on Bill Edit a comment on Bill Add a bill	Notify (Tip) Advisors Edit Bil Commenters Edit Bil Commenters Edit Edit Edit Edit Edit Edit Edit Edit	Mater Creator Edit Bill Creator Edit Bill Creator Edit Bill Creator Edit Bill Creator Edit Bill Creator Edit	-0 -0 -0	
Advisor Portal Notification Sche Triger Core User Assigned Case Add a comment on Bill Edit a comment on Bill Add a bill Change bill status	Notify (To) Advisors Edit Bit Commenters Edit Bit Creator effect Advisors Edit Creator Advisors	Mater Creator Edit Bill Creator Edit Bill Creator Edit Dill Creator Edit Bill Creator Edit Mater Creator		

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

Thank you!