

Email Listener Feature

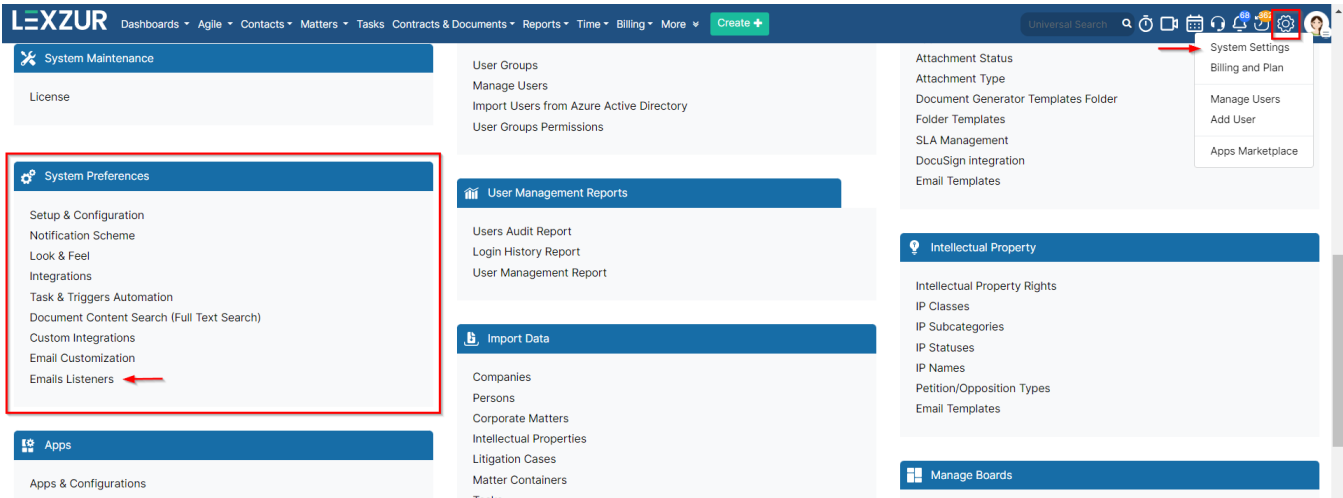
Objectives:

- Create Email Listener

Steps:

The Email Listener feature is now capable of facilitating Matter addition and Contract approvals. Users can set up their email listeners to automatically add matters into Lexzur based on emails received at specific addresses and approve contracts based on emails as well.

To configure it, navigate to **System Settings -> System Preferences** and select **Email Listener**.



Here, you can add a new listener and manage existing records.

Settings / Emails Listeners / [Add Email Listener](#)

Total Records: 5

Title	Email	Last Fetch Time	Report	Edit	Delete
Approval	jonesalice21@gmail.com (google)	2024-03-27 09:35:02			
Contra Team	rachasayed2023@gmail.com (google)	2024-03-27 09:35:02			
ABC Cases	andreaafahed1@gmail.com (google)	2024-03-27 09:35:02			
Cases	app4legal.automation.testing@gmail.com (google)	2024-03-27 09:35:02			
approval	rachatesting12@gmail.com (google)	2024-03-27 09:35:01			

To enable a new email listener, first choose the email server you want to use (Gmail, Microsoft, or Exchange Server)

Settings / Emails Listeners / Add Email Listener

To enable Email Listener Reach out to the support, click [here](#).

Emails Listeners

Google / Gmail

Office 365 mail

and sign in using your account

Sign in with Google



Choose an account

to continue to [Lexzur Connect for Google Workspace](#)



Alice Jones

jonesalice21@gmail.com



Use another account

Before using this app, you can review Lexzur Connect for Google Workspace's [privacy policy](#) and [terms of service](#).

Then, give this record a name for identification purposes. This name will be linked to the email account you sign in with. Next, choose the type of listener you want to apply, whether for matters or approvals.

[Settings](#) / [Emails Listeners](#) / Add Email Listener

Emails Listeners

Title*

Title

Email (google)*

jonesalice21@gmail.com

Type*

None

None

Matters

Approval

If you select "Matter," you'll need to specify additional details and configure the domain according to your preferences. This includes setting the category (such as Corporate Matters or Litigation Cases), assigning a practice area team, and designating a matter creator.

Emails Listeners

Title*

Email (google)*

Type*

Matters

Category*

Corporate Matters

Practice Area*

Acquisition

Assigned Team*

Corporate Team

Matter Creator*

Alice Jones

Save

The email listener will then periodically check this email account and add all received emails as matters based on the criteria you've configured.

Furthermore, there is a report available for each email listener, which lists all matters added or contracts approved via the listener. You can apply filters by date and export the report to Excel for further analysis and management.

Emails Listeners

From Date: 2024-03-01
Email: rachasayed2023@gmail.com

To Date: 2024-03-27
Subject:

Show: All

Search

Email	From	Subject	Date	Matter ID	Error	
rachasayed2023@gmail.com	Racha El Sayed	New matter testing	2024-03-22 15:06:08	M00003502		2024-03-22 15:10:03
rachasayed2023@gmail.com	A4LSP	A4LSP - M3339-A4LSP - CT-CDB-2024-3520-Contract DUB Awaiting Approval Status Edited	2024-03-20 16:44:17		Email is a reply email, we ignore it, we already fetch the original email. check table emails_listeners_log id: 2274	2024-03-20 16:45:07
rachasayed2023@gmail.com	A4LSP	A4LSP - M3339-A4LSP - CT-CDB-2024-3520-Contract DUB Awaiting Approval Status Edited	2024-03-20 16:44:15	M00003353		2024-03-20 16:45:07
rachasayed2023@gmail.com	A4LSP	A4LSP - M3339-A4LSP - CT-CDB-2024-3520-Contract DUB Awaiting Approval Matter was Updated	2024-03-20 16:41:05	M00003352		2024-03-20 16:45:07

Export to Excel

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

Thank you!