

How to Manage Email Notifications for Advisors

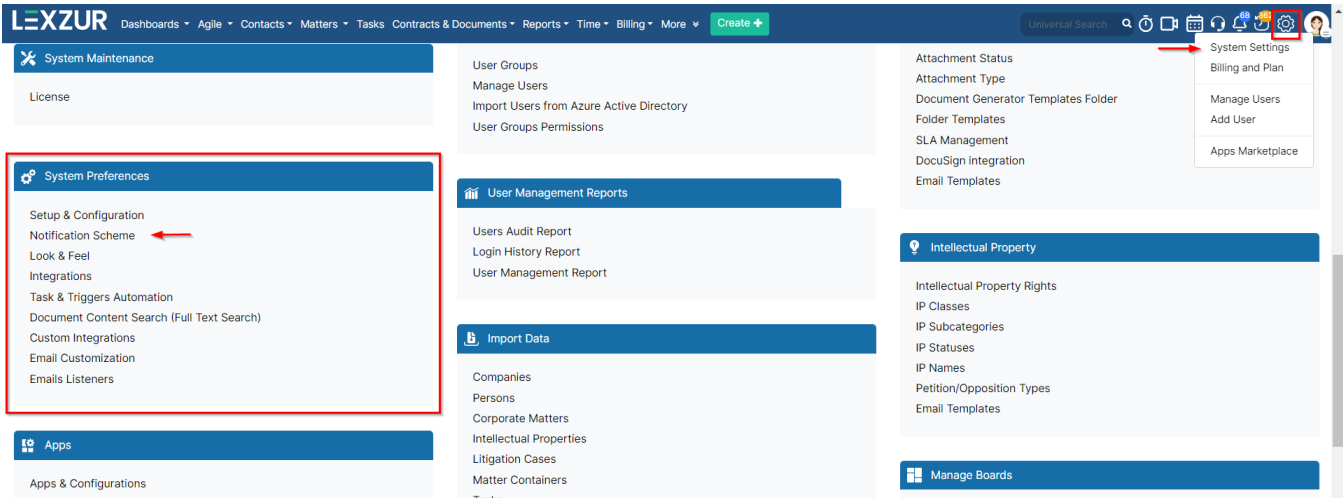
Objectives:

- Enable or disable email notifications for advisors

Steps:

Users now have the ability to manage email notifications sent to the advisor portal.

To do so, access the **System Settings** and navigate to the **Notification Scheme** within the **System Preferences**. This scheme oversees the dispatching of notifications from the system based on various triggers across different modules.



Within the advisor portal section of the notification scheme, and at the level of each trigger associated with advisors, you can individually deactivate email notifications sent to advisors.

Advisor Portal Notification Scheme					
Trigger	Notify (To)	Notify (CC)	Send Notification by email	Send to advisors	
Core User Assigned Case	Advisors Edit	Matter Creator Edit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Advisor Add Comment On A Matter	Assignee * Advisors	Matter Creator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Advisor Edit Case Status	Assignee * Advisors	Matter Creator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Advisor Edit Case Stage	Assignee * Advisors	Matter Creator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Advisor Add Hearing	Advisors	Matter Creator * Assignee	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Add a comment on Bill	Bill Commenters Edit	Bill Creator Edit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Edit a comment on Bill	Bill Commenters Edit	Bill Creator Edit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Add a bill	Bill Creator elise.khoury@app4legal.com Edit	Bill Creator Edit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Change bill status	Bill Creator Edit	Bill Commenters Edit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Core User Add Comment	Advisors Edit	Matter Creator Edit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Core User Edit Case Status	Matter Creator Edit	Matter Creator Edit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Core user add comment on advisor task	Edit	Edit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

For instance, when a core user assigns a case or adds comments, notifications are typically sent to both advisors and matter creators. However, with this feature (send to advisors column), you can choose to retain notifications for core users while disabling them for advisors, and vice versa. This provides users with greater control over email notifications tailored to the advisor portal.

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

Thank you!