

How to Use Outlook Connect

Objectives


- Access Outlook Connect Add-on and set up the integration with LEXZUR.
- Add Items from Outlook Connect to the system.
- Manage your Outlook add-on.

Steps

LEXZUR Outlook Connect is a smart add-on that enables you to manage your daily legal operations, by directly adding new information, syncing emails, accessing modules, and more, within a few clicks.

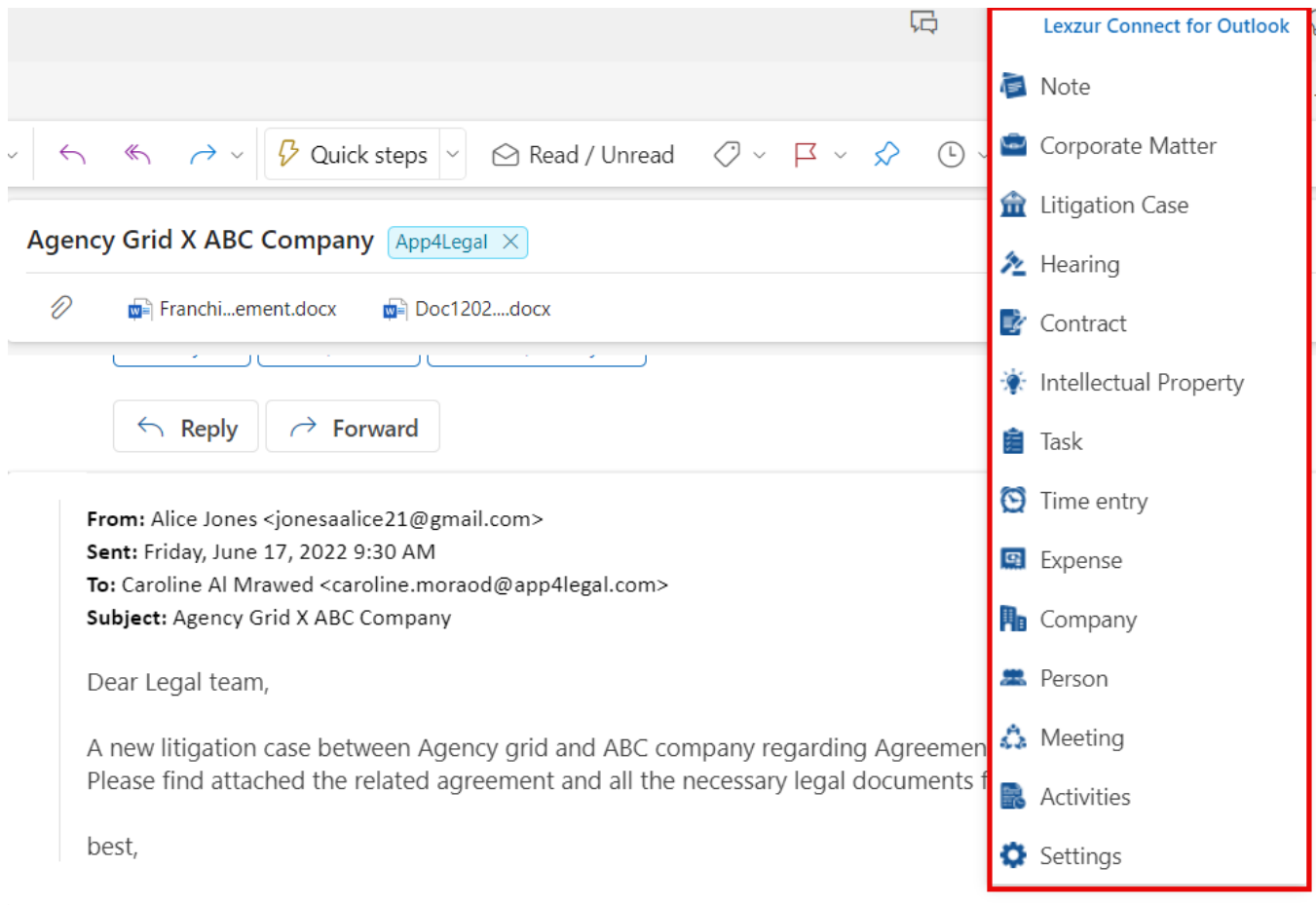
How to use it?

First, you should install the add-on.

 [Learn how to install the Outlook Connect here.](#)

Once it is successfully added you can now open an email and start using the add-on.

Open any received email, and from the 3 dots next to the email, choose the "Lexzur Connect for Outlook" option.

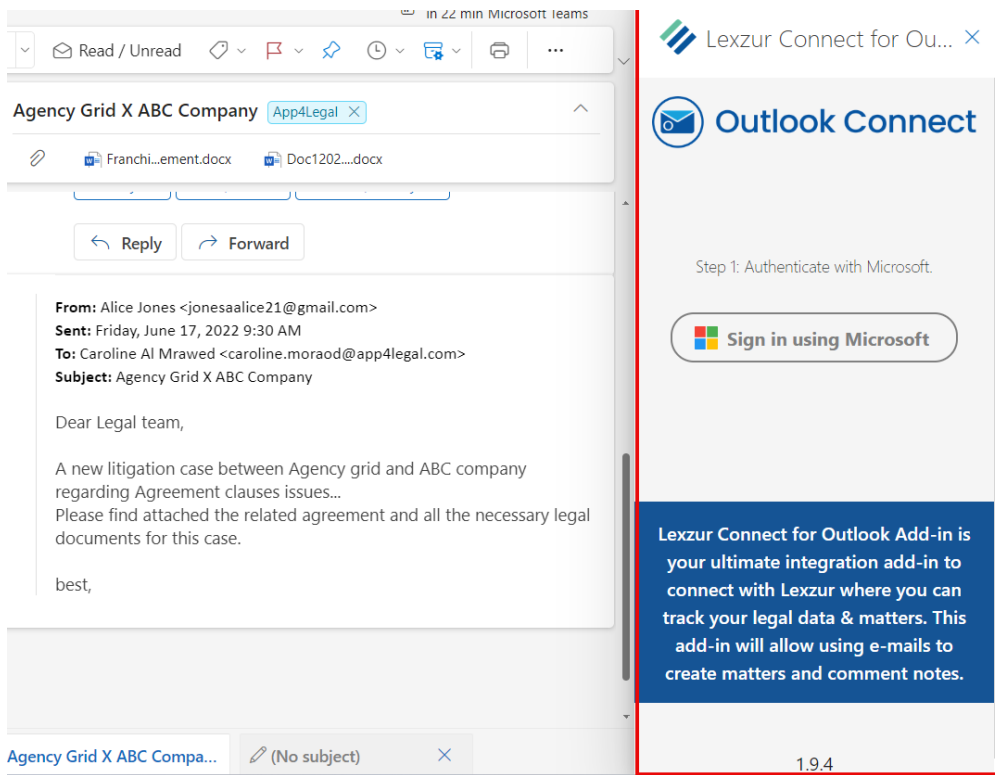


The screenshot displays an Outlook email interface. The email is from Alice Jones to Caroline Al Mrawed, with the subject 'Agency Grid X ABC Company'. The email body contains a greeting and a request for legal documents. On the right side, a context menu is open, listing various actions available through the Lexzur Connect add-on. The menu items are: Note, Corporate Matter, Litigation Case, Hearing, Contract, Intellectual Property, Task, Time entry, Expense, Company, Person, Meeting, Activities, and Settings. The menu is highlighted with a red border.

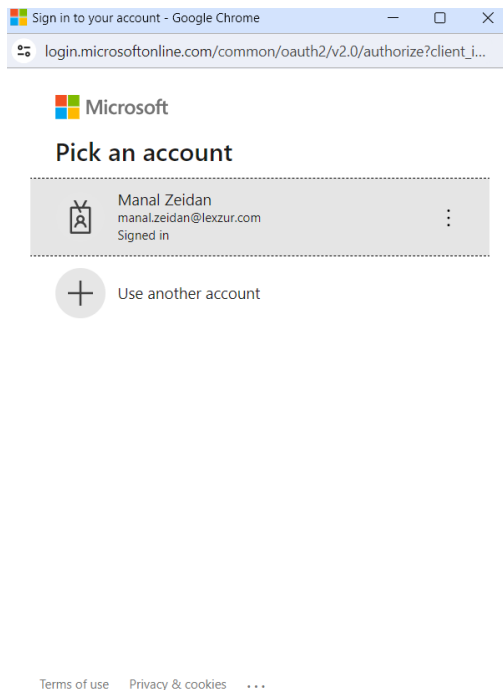
Lexzur Connect for Outlook

- Note
- Corporate Matter
- Litigation Case
- Hearing
- Contract
- Intellectual Property
- Task
- Time entry
- Expense
- Company
- Person
- Meeting
- Activities
- Settings

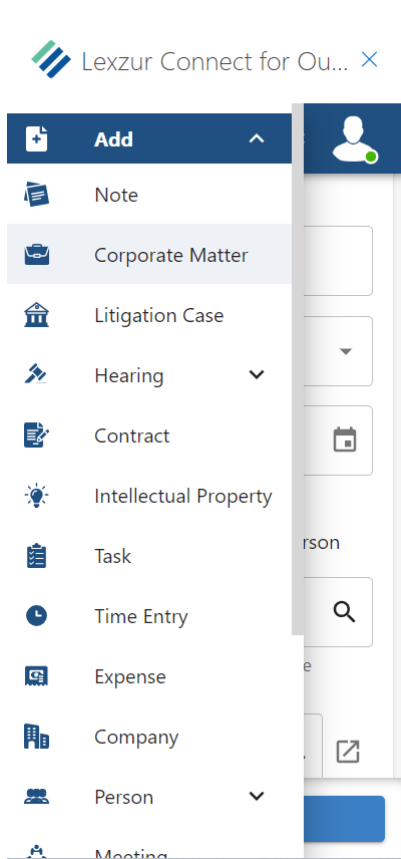
Once you choose any action for the first time, you will be asked to sign in to your Microsoft account.



then login to your LEXZUR instance using your LEXZUR credentials in order for the integration to happen.



After the connection is made you will be able to add data to the system such as corporate matters, litigation cases, contracts, tasks, time entries, add or edit hearings, and more.



When adding a matter, for example, certain fields are automatically retrieved from the email, such as the matter name, date, and description.

Agency Grid X ABC Company App4Legal

Thank you! Got it, thanks! Received, thank you.

Reply Forward

From: Alice Jones <jonesaalice21@gmail.com>
Sent: Friday, June 17, 2022 9:30 AM
To: Caroline Al Mrawed <caroline.moraod@app4legal.com>
Subject: Agency Grid X ABC Company

Dear Legal team,

A new litigation case between Agency grid and ABC company regarding Agreement clauses issues... Please find attached the related agreement and all the necessary legal documents for this case.

best,

General Info

Name *
Agency Grid X ABC Company

Practice Area *
Corporate

Arrival Date *
01/15/2024

Client Type

☒ Company / Group ☐ Person

Client Name
Confident Cases

Start typing to select from possible

SAVE

Tomorrow 09:00 Microsoft T...

Read / Unread

Agency Grid X ABC Company App4Legal

Thank you!

Got it, thanks!

Received, thank you.

Reply

Forward

From: Alice Jones <jonesaalice21@gmail.com>
Sent: Friday, June 17, 2022 9:30 AM
To: Caroline Al Mrawed <caroline.moraod@app4legal.com>
Subject: Agency Grid X ABC Company

Dear Legal team,

A new litigation case between Agency grid and ABC company regarding Agreement clauses issues...
Please find attached the related agreement and all the necessary legal documents for this case.

best,

Lexzur Connect for Ou... X

Documents

☒ Include Email(s) attachments ?

☒ Include the Email(s) as Attachment ?

+ ATTACH MORE EMAILS ?

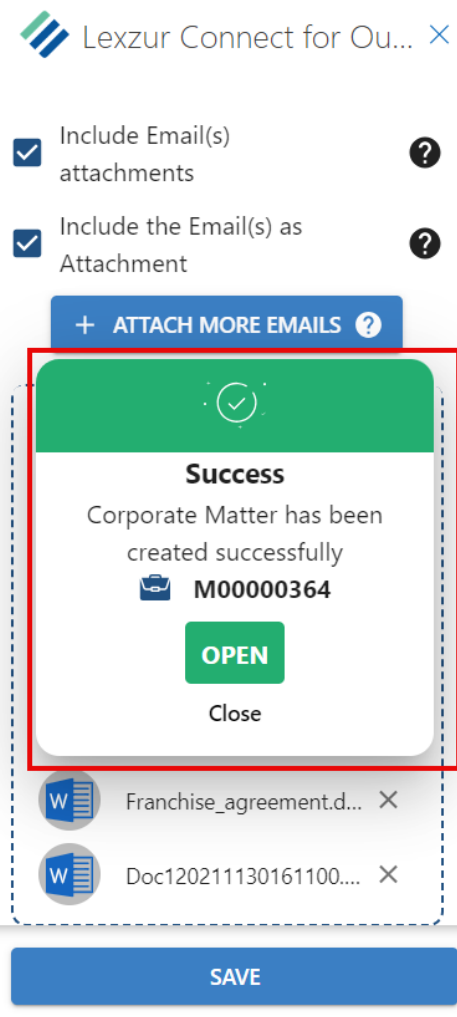
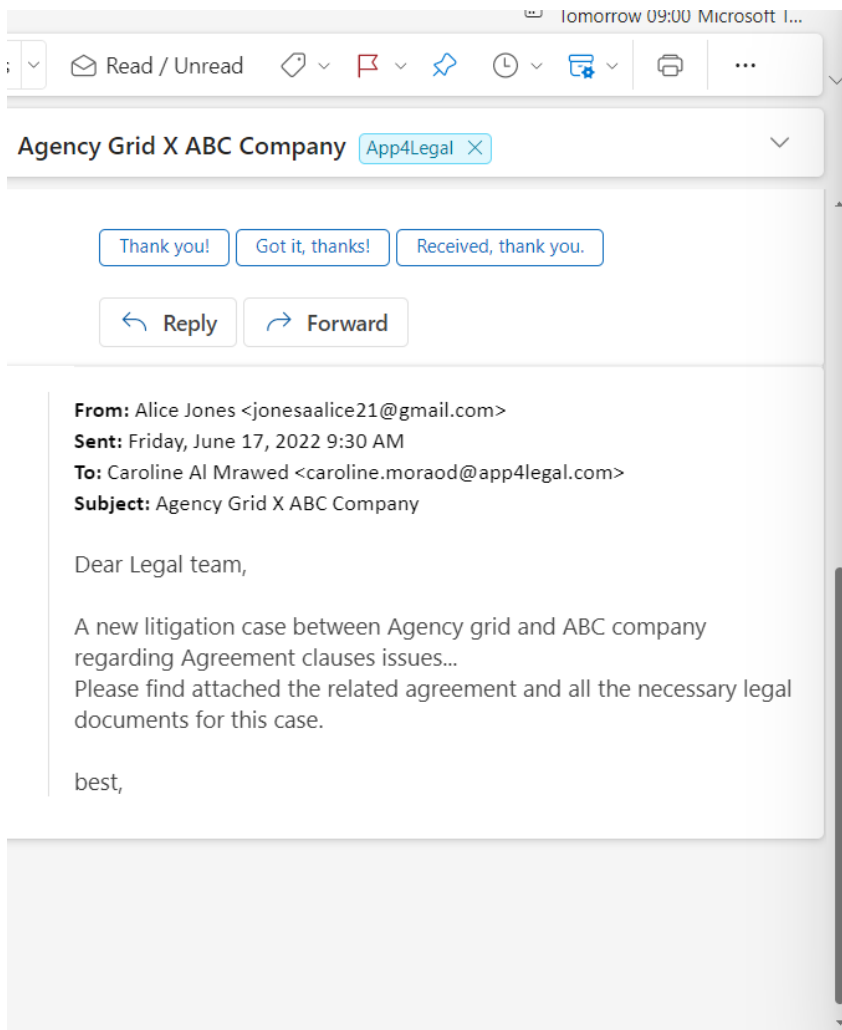
Drag and Drop a file or click

CM Fw: Agency Grid X A...
Caroline Mrawed
2024-01-15 16:19:02 X

W Franchise_agreement.d... X

SAVE

Your new corporate matter will be added to the system once you save it, and you can open it directly from here.



Similarly, you can use Outlook Connect to add litigation cases, tasks, hearings, time entries, etc...

Adding a time log from Outlook requires some information also such as the matter/task name, date effort, user name, and client name.

Additionally, you can always manage your time in Outlook, using an embedded timer to allow you to record your effort accurately.

Time Entry

General Info

Type

Matter

Task

Matter*

[M92]

Date*

05/24/2023

Effort*

1:00

Please enter the estimated time similar to the format: 1h 45m or 1h or 40m

00:00:00

SAVE

Time Entry

brand-Lite Company regarding Insurance agreement issues...Please find attached the related agreement and all the necessary legal documents for this case.best,

Category

Internal Status

To-Be Reviewed

Billable

Non-Billable

Client*

BLP industry

Start typing to select from possible

00:01:52

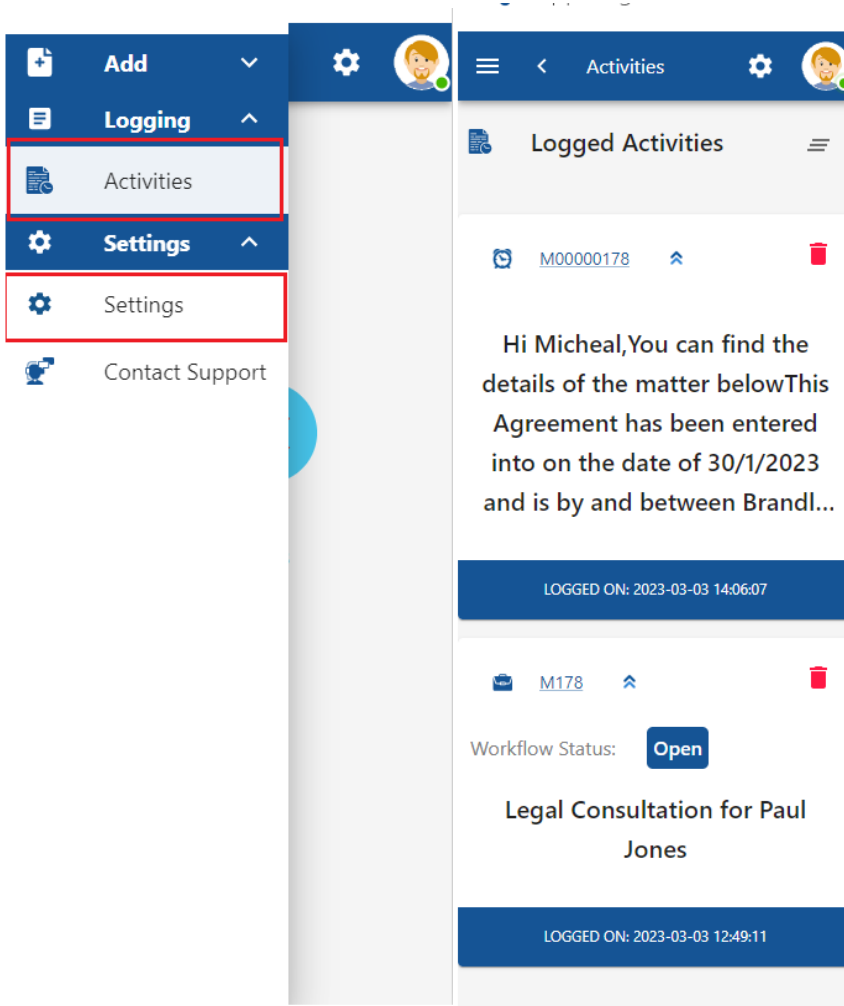
SAVE

You can easily, pause or stop this timer at any time and log it as a new time entry.

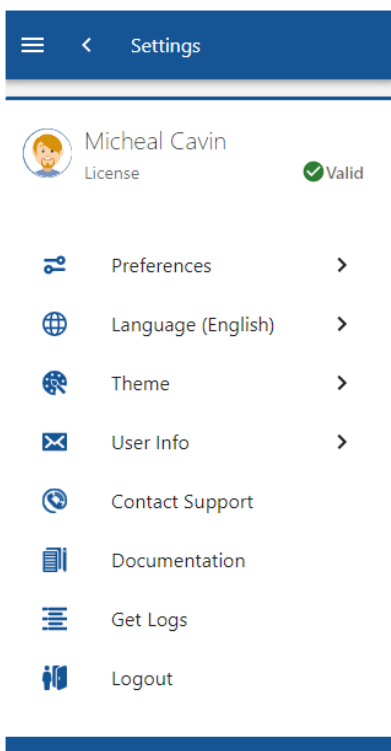


You can also keep a record of email threads between you and other users as notes. [Learn more here.](#)

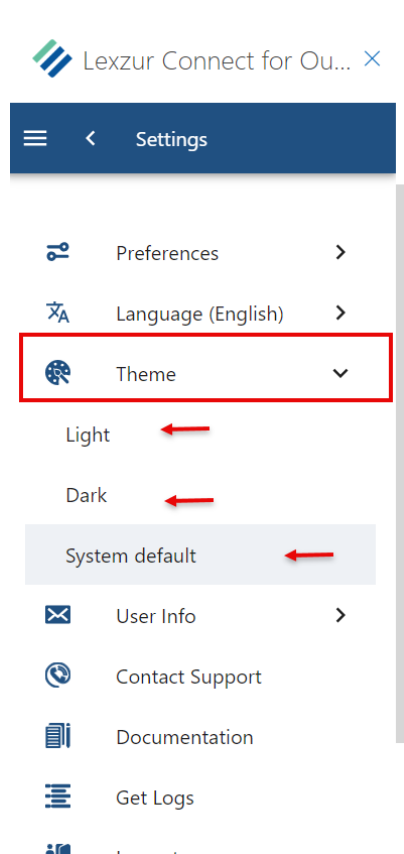
Moreover, the activities feature provides a quick overview of where the email has been linked or used in the core system.



Settings also provide users with access to manage their accounts, change the language, the theme, contact support, and so on.



The app reflects also the theme set on the system. The user has the choice to select between light, dark, and the system default (reflecting the system's look & feel).



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

Thank you!