

How to Use Lexzur Connect for Google Workspace™.

Objectives

- Add new Data to the system directly from the email
- Log email threads as notes, matters...

Steps

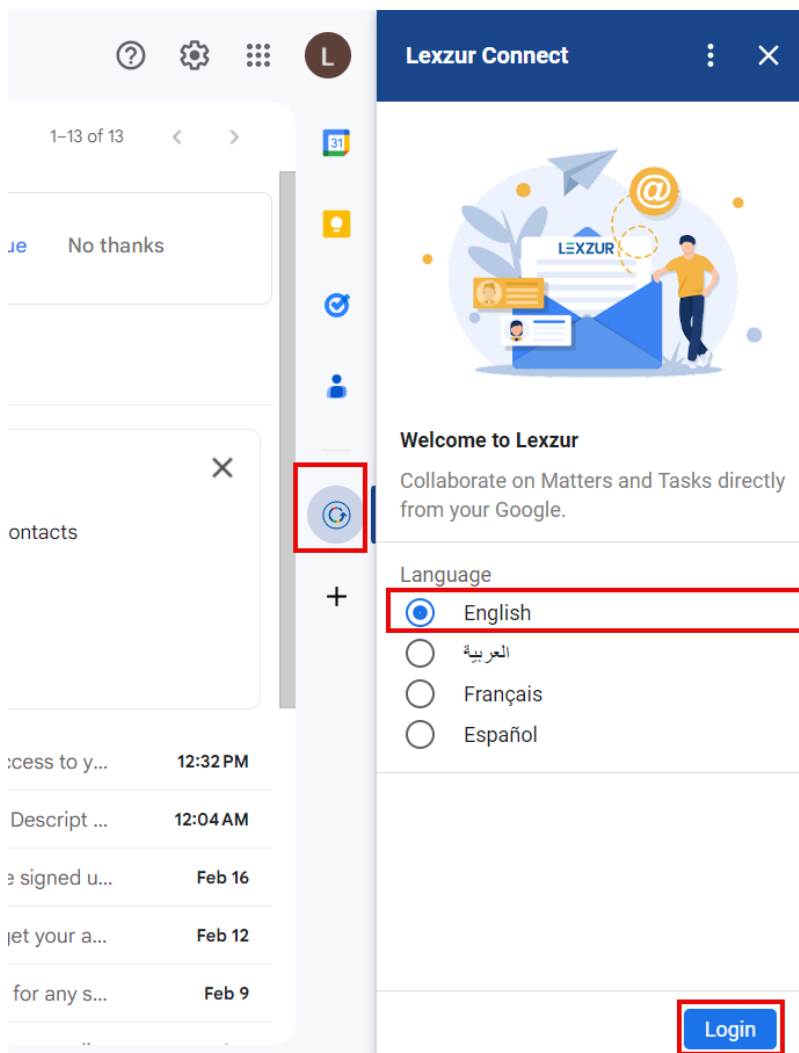
Lexzur Connect for Google Workspace™ is an add-on to your Gmail™ account that allows smooth integration between your LEXZUR instance and your Gmail™ account. By using the add-on, you will be able to directly add new information, sync emails, access modules, and more, within a few clicks.



You should install the Add-on first. [Learn more here](#)

How to access it?

Go to your Gmail™ account, open any received email, and click on the addon logo on the right-side menu.



You will be asked to log in first using your LEXZUR credentials for the integration to happen.

Therefore, enter your LEXZUR account credentials and sign in.



Login with your Lexzur account

lexzurtraining@lexzur.com

•••••

Data Center (UK)

Sign In

[Forgot Your Password?](#)

OR

Sign In using Azure AD

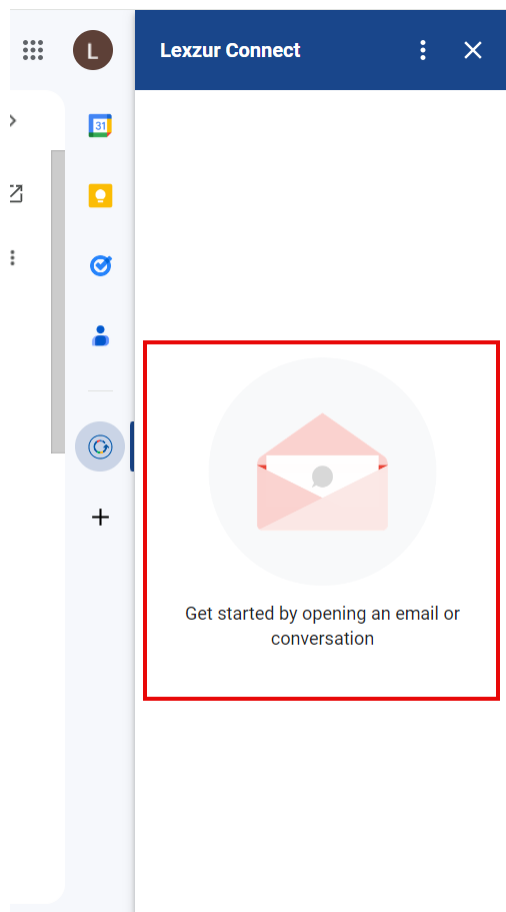
Login with SSO

New to Lexzur? [Sign up](#)

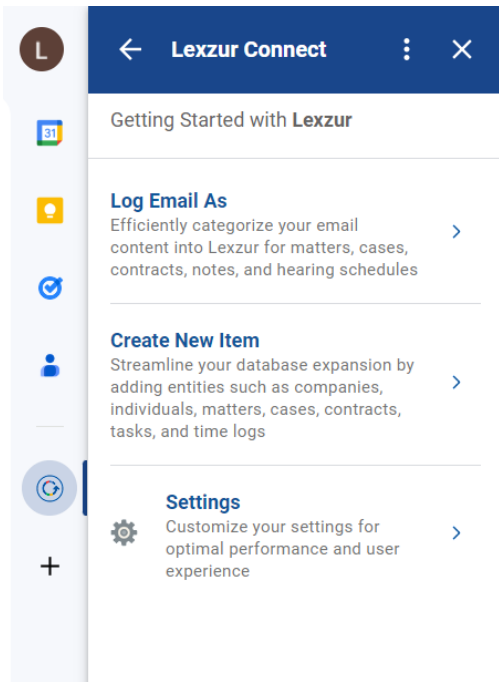
Learn more about our [Security](#) & [Privacy Policy](#)



After logging in, select an email to start working with Lexzur Connect for Google Workspace™

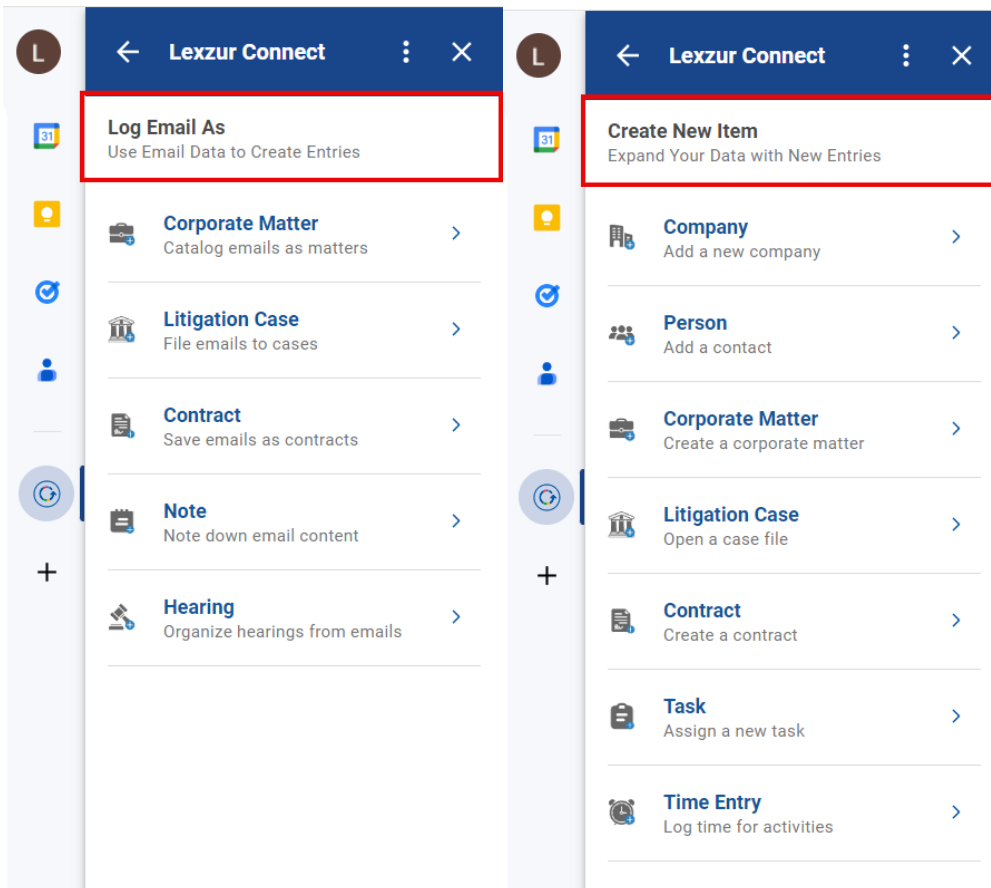


Here, you'll encounter two options: "Log Email As" or "Create New Item"



"Log Email As" allows you to add these emails as new corporate matters, litigation cases, contracts, or hearings based on the email's contents. Alternatively, you can log the email as notes on an existing contract or matter.

The alternative, "Create New Item" allows you to generate a new item such as a company, person, corporate matter, litigation case, contract, task, or time entry. These choices offer flexibility in efficiently organizing and categorizing emails within the system.



To log an email as a note, for example, specify whether you want to include it in an existing matter or contract. Then, search and select the name of the matter or contract. The content of the notes will be extracted from the email itself, and you can edit it as required. Additionally, you'll be able to include any email attachments and attach the email itself if necessary.

The image displays two screenshots of the Lexzur Connect mobile application interface.

The left screenshot shows the 'Add Note' screen. At the top, there is a blue header with a back arrow, the text 'Lexzur Connect', and a close icon. Below the header, there is a sidebar with various icons. The main content area has two radio buttons: 'Matter' (selected) and 'Contract'. Below these, there is a text input field labeled 'Matter *' with a red arrow pointing to it, containing the text 'legal advice on service agreemer'. Below this field is a hint: 'Start typing to select from possible matches'. Below that is another text input field labeled 'Note *' containing the text 'Dear Maria Robinson, I trust this email finds you well,'. At the bottom, there are two checkboxes, both of which are checked and highlighted with a red box: 'Include E-mail Attachments' and 'Include E-mail as Attachment (.PDF)'. A plus sign icon is visible at the bottom left of the sidebar.

The right screenshot shows the confirmation screen. It has a blue header with a back arrow, the text 'Lexzur Connect', and a close icon. Below the header, there is a green checkmark icon and the text 'A new note has been added'. Below this, there are two buttons: 'View in Lexzur' and 'Add Another Note'. At the bottom, there is a 'Home' button. A dark grey banner at the very bottom of the screen contains the text 'A new note has been added'.

Once saved, you can click to view the newly added notes in the system directly from here.

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

Thank you!