

How to Archive My Emails in the System

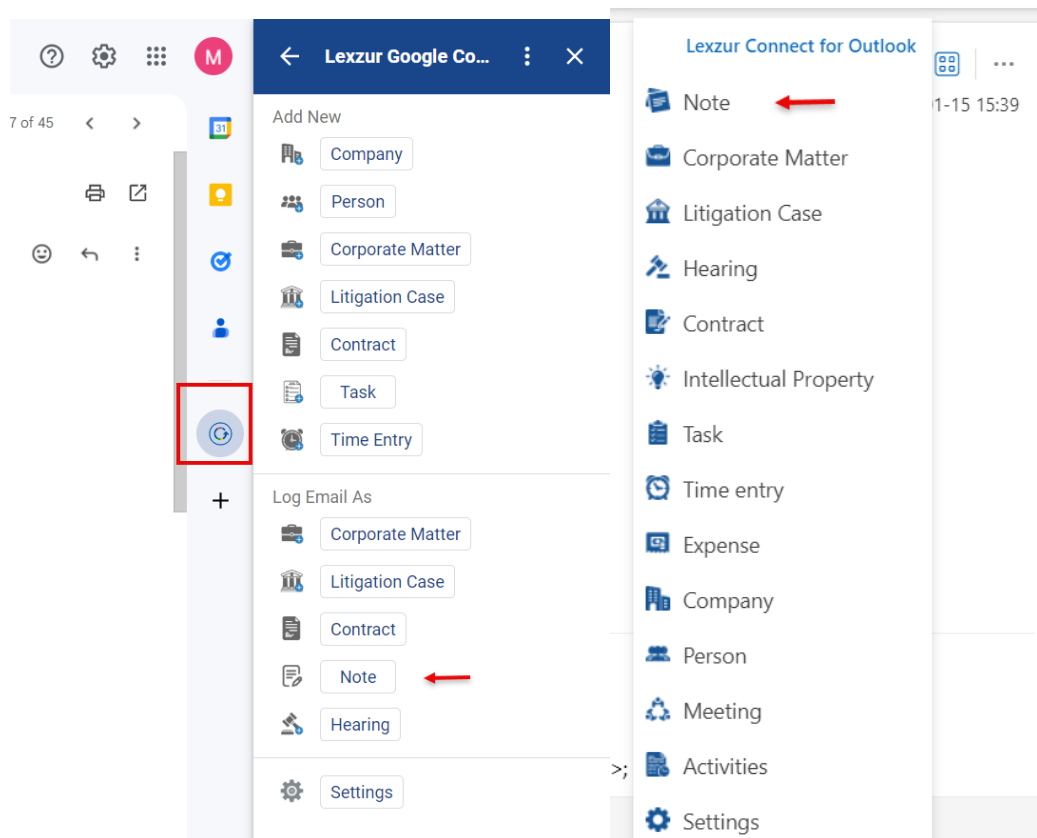
Objectives

- Log Emails as Notes in Matters and Contracts

Steps

In LEXZUR you can keep a record of email threads between you and other users or any received emails as a note inside matters or contracts.

From your Gmail or Outlook account, select the email you want to archive, then using Lexzur Connect for Gmail or Outlook, select **Note**.



To log the email as a note you must first specify the type, matter, or contract, The matter/contract name.

You will be able to include the whole email or select part of it, and add the previous conversation if this email is a thread, where you can add the thread content from the beginning of the conversation till this email along with their attachments.

Level Link Legal- Lexzur Trai...
Now, Microsoft Teams

eps Read / Unread

Agency Grid X ABC Company

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,

Agency Grid X ABC Compa... (No subject)

Lexzur Connect for Ou... X

Note

Log Email as a Note into:

☒ Matter ☐ Contract

Matter* [M112] legal opinion for /X

Note

BODY IMAGES HEADER TIME-STAMP TEXT

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✂

From: Alice Jones Sent: Friday, June 17, 2022 9:30 AM To: Caroline Al Mrawed Subject: Agency Grid X ABC Company Dear Legal team, A new litigation case between Agency grid

SAVE

In addition, you can log time entries along with creating a new matter note, and you can include the Email attachments or include the email as an attachment.

M

M00000112 legal opinion for Alice

Matter - Corporate Matter

General Info

Tasks

Reminders

Emails

Bills

Attachments

Expenses

Time Entries

Invoices

Matters

Contracts & Documents

Settings

Emails

Archive

Received On

From

Subject

To

Actions

2024-01-15 16:19:02

caroline.morad@lexzur.com (Caroline Mrawed)

Fw: Agency Grid X ABC Company

maral.zaidan@lexzur.com

From: Alice Jones Sent: Friday, June 17, 2022 9:30 AMTo: Caroline Al Mrawed Subject: Agency Grid X ABC Company Dear Legal team, A new litigation case between Agencygrid and ABC company regarding Agreement clauses issues..Please find attached the related agreement and all the necessary legal documents for thiscase best,

Added by Lexzur Connect for Outlook

Total Records: 1

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

Thank you!