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.

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Agency Grid X ABC Company	= Note 👩 🌣 🔔
← Reply → Forward	Log Email as a Note into:
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,</caroline.moraod@app4legal.com></jonesaalice21@gmail.com>	Matter * [M112] legal opinion for /X AC Note Note T B I U C Caroline Al Mrawed Subject: Agency Grid X ABC Company Dear Legal team, A new
Agency Grid X ABC Compa 🖉 (No subject) 🛛 🗡	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.



Once done, the note will be created and added under the selected Matter/Contract in the system.

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And it could also be accessible from the Emails page under Archive

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

Thank you!