

# How to Use the Outlook Connect-Desktop Version

## Objectives

- [Access Outlook Connect Add-on and set up the integration with LEXZUR.](#)
- [Add Items from Outlook Connect to the system.](#)
- [Archive Emails in the System](#)
- [Manage your Outlook Connect](#)

## Steps

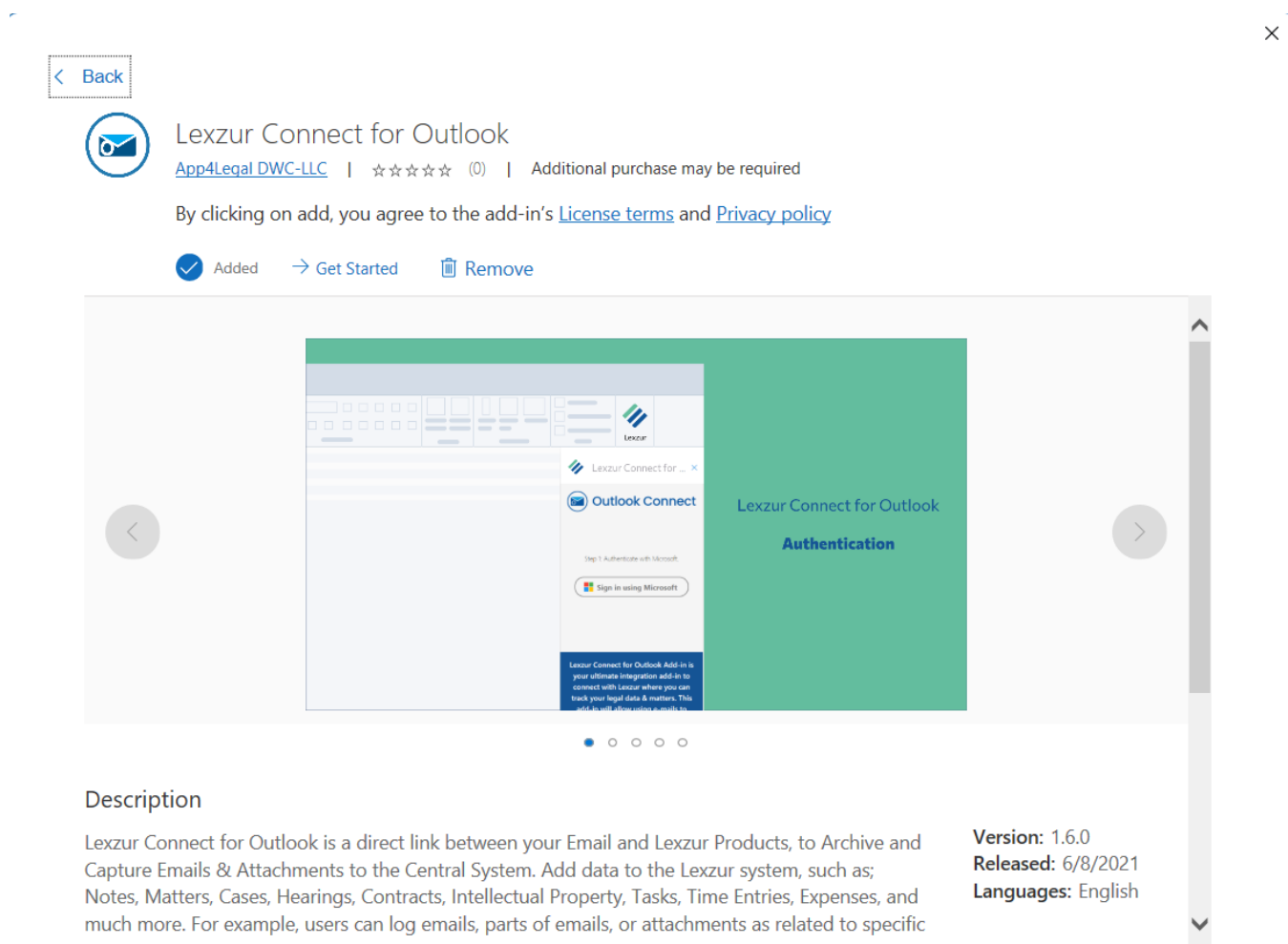
LEXZUR Outlook Connect is a smart add-on that enables you to manage your daily legal operations, by directly adding new information, syncing emails, accessing modules, and more, within a few clicks.

### Get the Outlook Connect:


First, you should install the add-on.

Click on **Get Add-ins** from the home menu to open the office store.



From the office store, search for "Lexzur Connect for Outlook", and **Add** it.

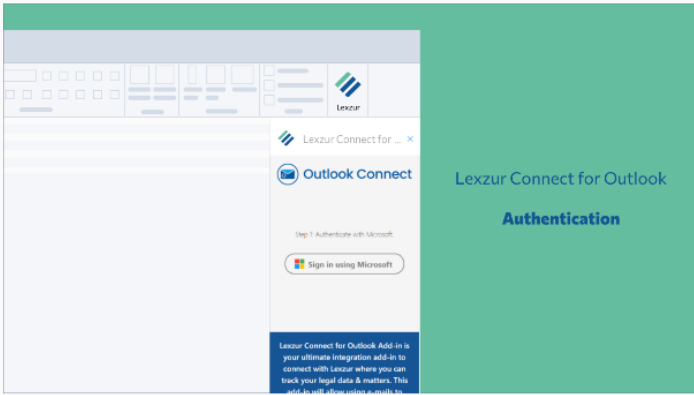


[Back](#)

 **Lexzur Connect for Outlook**  
[App4Legal DWC-LLC](#) | ☆☆☆☆ (0) | Additional purchase may be required

By clicking on add, you agree to the add-in's [License terms](#) and [Privacy policy](#)

 Added [→ Get Started](#)  Remove



**Description**

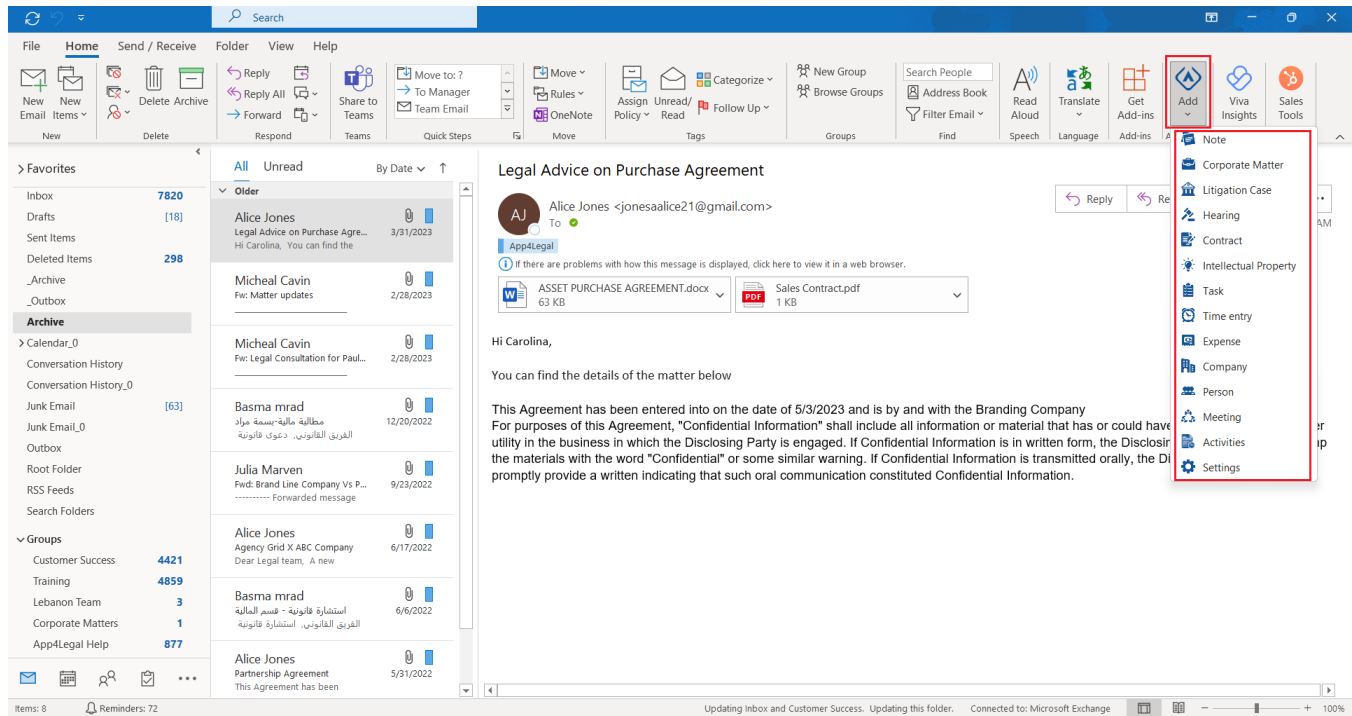
Lexzur Connect for Outlook is a direct link between your Email and Lexzur Products, to Archive and Capture Emails & Attachments to the Central System. Add data to the Lexzur system, such as; Notes, Matters, Cases, Hearings, Contracts, Intellectual Property, Tasks, Time Entries, Expenses, and much more. For example, users can log emails, parts of emails, or attachments as related to specific

**Version:** 1.6.0  
**Released:** 6/8/2021  
**Languages:** English

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

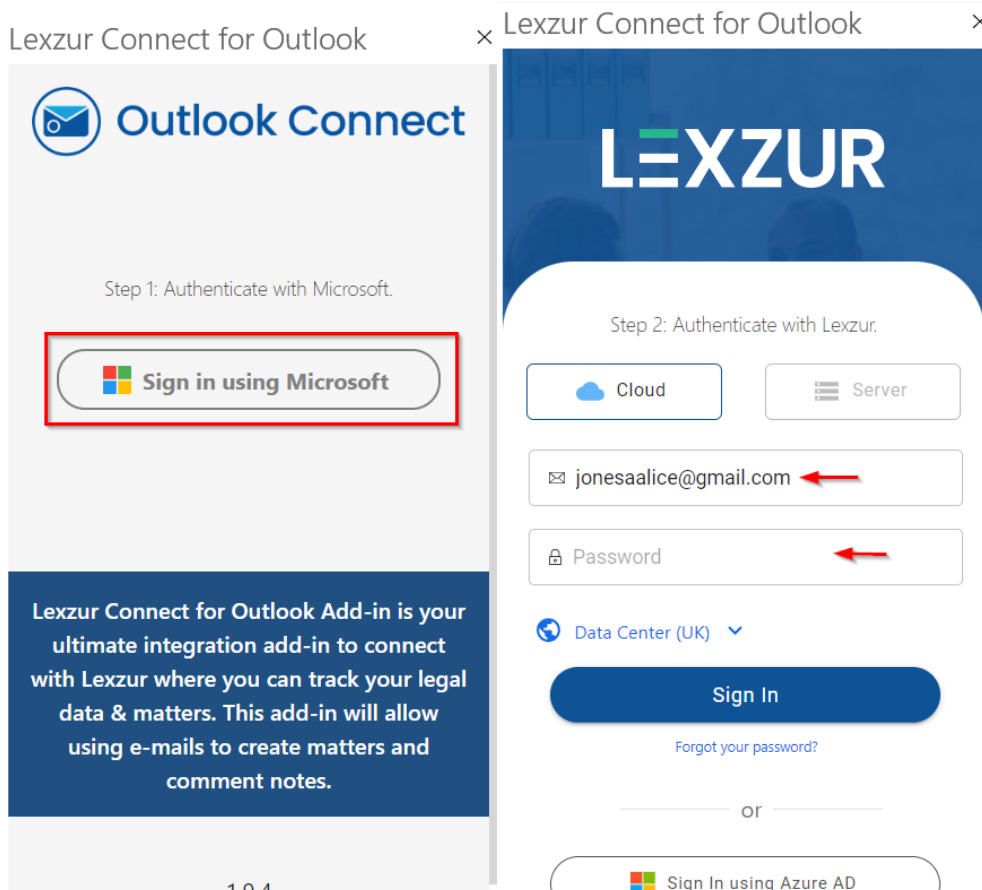
### Use the App:

Open any received email, you will see the Outlook Connect added within your add-ons in the menu, click on **Add** to open the add-on menu.



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

Then log in 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 hearing, for example, similar to the hearing form in the system you must specify the related case name, the hearing type, date, time, and so on.

Additionally, you can copy the email content as a hearing comment or summary, and include the email attachments as well.

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

Lexzur Connect for Ou... X

Hearing

General Info

Matter Name \*

[M63] John Marven Vs ...

M20, Litigation Case name, or Client Name

Stage

Arbitration

Hearing Type

Hearing in Presence

Date \*

01/15/2024

Time

04:00 pm

SAVE

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Assignee(s)

Maria Dave

ASSIGN TO ME

Time Spent

1:00

example 1:40 or 1h40m

Comments

Summary by lawyer ?

SAVE

Lexzur Connect for Ou... X

COPY FROM EMAIL CONTENT

Summary to client ?

Documents

SAVE

Lexzur Connect for Ou... X

COPY FROM EMAIL CONTENT

Summary to client ?

Success

Hearing has been created successfully

266

OPEN

Close

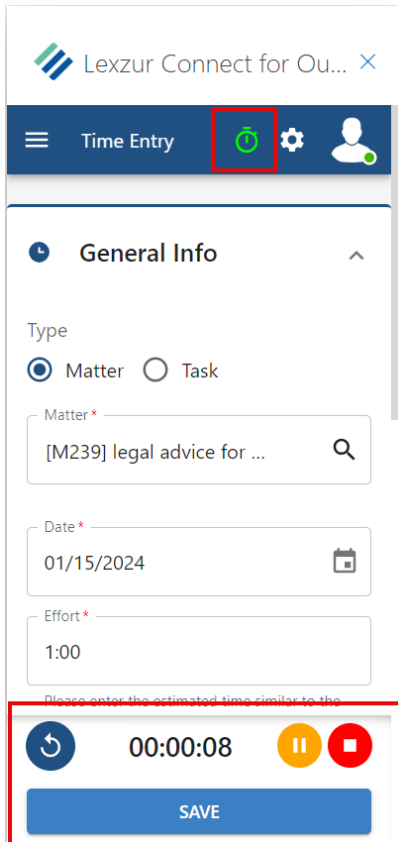
Documents

SAVE

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.



The screenshot displays the 'Lexzur Connect for Outlook' application window. The top navigation bar includes a menu icon, 'Time Entry', a green timer icon (highlighted with a red box), a settings gear, and a user profile icon. The main content area is titled 'General Info' and contains the following fields:

- Type:** Radio buttons for 'Matter' (selected) and 'Task'.
- Matter \*:** A text input field containing '[M239] legal advice for ...' with a search icon.
- Date \*:** A date picker showing '01/15/2024'.
- Effort \*:** A time input field showing '1:00'.

Below these fields, a red error message reads: 'Please enter the estimated time similar to the'. At the bottom, a red box highlights a control bar containing a refresh icon, a timer display showing '00:00:08', a pause icon, a stop icon, and a blue 'SAVE' button.

### Archive Emails:

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

To do so, use **Notes**. Log your emails as notes in matters or contracts.

Notes could include the email details and attachments as well.

[blocked URL](#)

### Manage the App:

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

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

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Activities

Logged Activities

H266

2024-01-15

LOGGED ON: 2024-01-15 16:02:50

Lexzur Connect for Ou... X

Settings

Maria Dave

License

Valid

Preferences

Language (English)

Theme

User Info

Contact Support

Documentation

Get Logs

Logout

For more information about LEXZUR, kindly reach out to us at [help@lexzur.com](mailto:help@lexzur.com).

Thank you!