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How to Create and Send Emails Within a Matter

Max Mazo - 2025-10-27 - [Comments \(0\)](#) - [Matters](#)

How to Create and Send Emails Within a Matter

This guide provides instructions on how to use the built-in email functionality to communicate with clients and external parties directly from within a matter file. This process ensures that all correspondence is automatically logged and recorded against the correct matter, which is what is required for comprehensive and complete record-keeping.

Sending an Email via a Workflow Task

Some internal processes are designed to initiate email correspondence when a specific task is completed in a matter's workflow.

1. **Navigate** to the matter which you wish to work on.
2. Select the **Tasks** tab from the matter's navigation bar.
3. Locate the specific email task within your list, which is the one you need to complete.
4. **Click** on the task heading hyperlink, which will bring up the task modal.
5. Click the large **Send E-mail** button in the centre of the modal to proceed to the main **Email Correspondence** composition screen.

Email task ✎
Sale of 22 Heron Way • #236

Send E-mail

PRIORITY
STANDARD

STATUS
TO-DO

CATEGORY
Email

DUE DATE
31/Oct/2025

ESTIMATE TIME
0 min

ASSIGNED TO
Adam Field

Notes
No notes added yet. [Click the edit icon to add notes.](#)

Notifications
 Send notification when task is completed
When enabled, completing this task will create a notification for the matter

Comments
Add a comment...
Add Comment

No comments yet
Add the first comment above to start the conversation

1. Optionally, enter email addresses into the **To, CC and BCC emails** fields.
2. To attach a document from the matter file, click the **Upload from correspondences** button located at the bottom of the window.



Email Correspondence

To

Add cc emails

Add bcc emails

Subject

Message USE TEMPLATE

B *I* U ~~S~~ | A² v A v A v A | | v v

Upload from correspondences +

Cancel Send

1. Once the email is ready, click the blue Send button located in the bottom-right corner. The email will be sent to the recipient and a record of the correspondence will be saved against the current matter.

Composing and Sending a New Email Manually

You can manually initiate an email at any point from the Matter.

1. From anywhere in the matter you can locate the row of icons in the grey tray in the upper-right section of the screen.
2. Click the **Send an Email** icon, which is represented by the envelope symbol.

Dashboard < Matter < Sale of 22 Heron Way

236 In Progress **Sale of 22 Heron Way**

CLIENT: Col Secomb, BRASTEDS TWENTY20 LIMITED, Bart Simpson RESPONSIBLE LAWYER: Adam Field CASE TYPE: Mergers & Acquisitions

Overview Progress Tasks Forms Correspondence Time & Billing Billing Prep Compliance Accounts

TOTAL WIP: £100.90 TOTAL INVOICED: £120.00 TOTAL UNPAID INVOICES: £120.00 FINANCIAL BUDGET: £220.9 of £100K

Client information [→ Add Client](#) Related contacts [→ Add Related Contact](#)

1. In the **Email Correspondence** window, enter the recipient's address into the **Enter email** field. A list of matching contacts will appear as you type, which allows you to select the correct person.
2. Optionally, enter additional addresses into the **Enter cc emails** and **Add bcc emails** fields.
3. Confirm the **Subject** line. The system will pre-fill this field with the matter name, which is what links the correspondence to the matter file.
4. Compose your message in the main text box. Use the formatting bar above the text box to apply **Bold**, **Italics**, or other styles as required.
5. To attach a document from the matter file, click the **Upload from correspondences** button located at the bottom of the window.
6. Once the email is complete, click the blue **Send** button located in the bottom-right corner. The email will be sent to the recipient and a record of the correspondence will be saved against the current matter.

Applying an Email Template (if required)

To save time and ensure consistency, you can apply a pre-configured template to your email.

1. While in the Email Correspondence composition window, locate the USE TEMPLATE button in the lower-right area of the text box.



Email Correspondence

To

Add cc emails

Add bcc emails

Subject

Message

USE TEMPLATE

B *I* U ~~S~~ | A² ▾ A ▾ **A** ▾ AI ▾ | | ▾ ▾

Upload from correspondences +

Cancel

Send

1. Click the USE TEMPLATE button (if you need to use a template). A Use Template modal will open, which shows a list of available templates.

Use template

Find template by title

Title	Description	Case Types
<input type="checkbox"/> Litigation - Initial Email to Opposing Solicitor	Providing initial information to client	-
<input type="checkbox"/> Confirming Instructions to Other Solicitor	Property Purchase - Email confirming instructions to seller's solicitor	-
<input type="checkbox"/> Letter of Engagement to Client	Email sending letter of engagement and terms of business to client	-
<input type="checkbox"/> Email to Solicitor	Simple Email	-
<input type="checkbox"/> Sending Litigation Fee Estimate	Standard email template sending fee estimate on litigation matters	-
<input type="checkbox"/> Form & Fields for String	testing form fields inside emails	-
<input type="checkbox"/> Unpaid Invoice Reminder	testing	-
<input type="checkbox"/> Email to Client to Confirm Fees	Email to the client to confirm fees	-
<input type="checkbox"/> Adam Test	as above	-
<input type="checkbox"/> Sending SDLT	-	-
<input type="checkbox"/> Email to Client RE: Instructions	-	-
<input type="checkbox"/> Email to Solicitor	-	-
<input type="checkbox"/> Client re Car Accident	-	-

Click to select certain item

Cancel

1. Select the desired template from the list by clicking on its Title.
2. Click Continue in the bottom-right corner of the modal to apply the template content to your email.
3. Review and edit the pre-filled template text as necessary, then proceed to send the email.