# How to use the Client Portal as Client

## **Objectives**

- Access the portal
- Request and follow up on matters/cases/contracts through the Client Portal

## Steps

LEXZUR Client Portal allows legal teams to collaborate and communicate with their clients and requesters. Requesters will connect with the legal team to share data and collaborate on matters, cases, and contracts.

#### How to access the Client Portal:

- First, to use the client portal, the admin should add you as a client portal user from the system.
- You will receive an email notification inviting you to join the client portal.

Invitation to Lexzur Workspace Index x			8	ß
noreply@app4legal.com to me ▼	Tue, Feb 6, 4:02 PM	* @	) ←	:
LEXZUR				
You've been invited to The Lexzur Client Portal				
"Anna Cavin" has invited you to collaborate on The Lexzur Client Portal. Click the button below to set up your password.				
Click here				

The email will include a link to set up your password. Once you have set up your account, you can log in to the client portal.

Password:*	
Password Confirmation:*	
submit	

Lexzur users can easily share the Client Portal URL with collaborators or embed it on their website, enabling them to access the portal effortlessly.

• Both the Client Portal URL and the link embedded in the email will redirect you to the Client Portal Login Page. Sign in using your credentials or cli ck Sign Up if you don't have an account.

	Client Portal by LEXZUR Welcome to LEXZUR Client Portal	
	🖂 User Login 🔫	
	Password	0
	Keep me signed in	
	Sign In	
33	Or Sign in using Azure Sign in using OneLogin	
	Don't have an account? Sign Up	
	Welcome to LEXZUR Client Portal	
	First Name	
	(S) Username	
	🖾 Email	
	Password 📀	
	Confirm Password	
	Sign Up Already have an account? Sign In	

### **Raise Requests from the Client Portal:**

You can now connect to the legal team, raise new requests, and follow up on your requested matters or contracts securely and confidentially.

From your Home page, you can find the list of predefined forms set by the legal team to allow you to request matters, cases, or contracts.
Search for requests or click on the available categories to view the list of requests organized under each category.

<b>?</b>	Welcome to LEXZUR Client Portal Submit a new request by clicking on one of the options below	
Ê	Search for a Request	
	Cases 😮	>
	Legal Advice 💡	>
	Others	>
	Agreements	>
	Contracts	>
	Contract/Document from Template	>
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• Choose the suitable request type, for example, "Request a corporate matter" fill in the necessary information, and submit your request once done.

Each request type requires different fields to be filled in, which are determined by the legal team.

• Once the request is submitted, the legal team will receive a notification about the new matter, and they will start working on it.

7	Welcome to LEXZU	Legal Opinion X
		a Name*
Ê	Search for a Request	
	Cases Legal Advice Commercial Consultation	Priority* Choose Assigned Team* Choose
	Legal Opinion	Due Date*
	Request a corporate matter	YYYY-MM-DD
₽	Request a matter	
(⊒ (→ (>)	Others	Description* Cancel

• You will also receive an email notification including your request details:

Lexzur - M415-Administrative Consultation for Adam Add Lexzur -noreply@app4legal.com- to me +		Thu, Feb 29, 4:17 PM (7 days ago) 🏾 🌟 🥥	¢	2	6	3
Activity Alert						+
	Requester Info					
Name	Julia Marven					
Username	Julia				1	
Email	marvenjulia@gmail.com					
Department	HR					
	Details					
Hello Julia Marven						
Your request has been created.						>

- You can then view all your requests and follow up on each one from the Matters/Cases Page.
  Here, you can search for requests using quick filters such as matter status and practice area. You can also export the list of your requests to Excel and request a new matter on the fly.

LEXZUR	Matters/ Cases						Export to Excel 🛓 🛛 Re	quest a new Matter 👻
Raise a new request	All Created by me	Created by other Litigation only Corporate only					Search:	
Contracts / Agreement	ID	Name Assignee Assignee	Status 🗸	Practice Area Practice Area	Category Category	Priority	Created By Created By	Requested By Requested By
· · · · · · · · · · · · · · · · · · ·	M00000422	Legal Review for Julia	Open	Legal opinion	Matter	high	Julia Marven	Mariana QZ
	M00000429	Legal Opinion for BLP	In Progress	Commercial	Matter	critical	Maria Dave	Mariana QZ

As a client, you have access to track some of your request details and receive updates from the legal team.

- Open the request page by clicking on its ID.
- · Here, you can follow the workflow status, related people, dates, and important developments and view hearings and attachments from the other tabs.
- · Both the client and the legal team can communicate through the Notes tab. You can write your comments in the notes section, attach files, and press "Add note".

The legal team will be notified, and they can see the attachments and add a new note.

Note 2 Watchers : Start typing Mariana QZ (Portal User) Review the Agreement 2024-04-03 1118 Review the Agreement 2024-04-03 1118 Review the Agreement 2024-04-03 1118		nt of Sales between BLP			
Type : Drafting New agreements   Type : Drafting New agreements	Details Attachments Ap	oproval Center 🤡 🛛 Signature Cer	nter 🥝 Milestones		
Type : Drafting New agreements   Notes 2	Status : Under Signature		Priority : Medium	ste People	
Notes 2     Image: with a greement       Marian 02 (Portal User) Review the Agreement     2024-04-03 1110 2024-04-03 1120       Maria Dave Upon reviewing we need to change clauses 2 and 3     2024-04-03 1120	Type : Drafting New agreements				By: Ma
Mariana QZ (Portal User) Review the Agreement Upon reviewing we need to change clauses 2 and 3 Light and the agreement of					
Maria Uzi Vorta Usier)     2004-04-03 1118       Review the Agreement     Image: Sequence of the Agreement       Maria Dave     2024-04-03 1120       Upon reviewing we need to change clauses 2 and 3     2024-04-03 1120	Notes 2			~	
Marlis Dave     2024-04-03 1120       Upon reviewing we need to change clauses 2 and 3     2024-04-03 1120	Mariana QZ (Portal User)			2024-04-03 11:18	
Maria Dave 2024-04-03 11:20 Upon reviewing we need to change clauses 2 and 3	Review the Agreement			m Requested of	on: 2023-1:
Upon reviewing we need to change clauses 2 and 3				🔁 Last Update	2023-12
		Naucas 2 and 2		2024-04-03 11:20	
Farmat →   B I U   ∞   ← →   X   ⊠   Ø	opontenetting we need to change of	100909 2 0H0 0			
	Format - B I U @				

#### Similarly, you can also view and follow up on your requested contracts from the Contracts page.

s	All Awaiting Approval Aw	aiting My Approval Awaiting Signa	ture Awaiting My Signat	ure				Document for Review cument from Template
greement	# ID	Name	Status	Type	Reference#	Requested By Requested By	Assignee	Last Update
	491 DNA-491	Sales Agreement	Filing & Drafting	Drafting New agreements		Manal Zeidan		2024-04-01 10
	457 PUA-457	Purchase Agreement for ABC	Under Negotiation	Purchase Agreement		Manal Zeidan	Maria Dave	2024-03-08 15:
	444 DNA-444	NDA	Filing & Drafting	Drafting New agreements		Manal Zeidan		2024-01-24 12:1
	429 PUA-429	Sales Agreement between BLP and ABC	Filing & Drafting	Purchase Agreement		Manal Zeidan		2024-04-03 11:
	428 DNA-428	Agreement of Sales between BLP and ABC	Under Signature	Drafting New agreements		Manal Zeidan		2023-12-28 16:3
	394 PAA-394	Service Agreement for Albert	Under Approval	Partnership Agreement		Manal Zeidan	Maria Dave	2024-01-02 13:2
	Showing 1 to 6 of 6 entries							
	showing I to 6 of 6 entries							

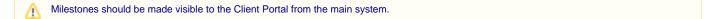
- You can request a contract using the questionnaire (draft contract from template), or upload a document for review.
  You can then follow up on your requested contracts each on a separate page, so track details and status, and view or add related attachments.

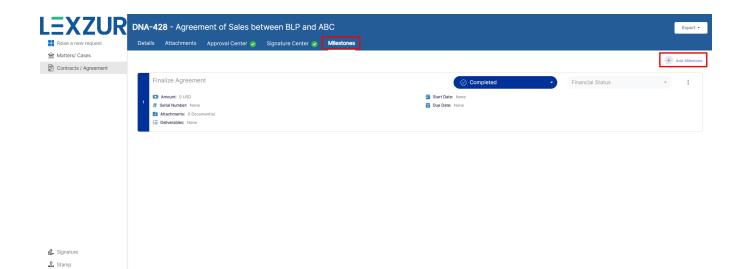
Details Attachments   Status: Under Signature   Type: Drafting New agreements     Notes (2)   Approval & Signature History	DNA-428 - Agreement of Sales betw	een BLP and ABC			
Image: Specific	Details Attachments Approval Center 🤣 S	Signature Center 🥑 🛛 Milestones			
Notes 2       Approval & Signature History       Start typing         Approval & Signature History	Status : Under Signature	Priority : Medium		🔹 People	
Notes 2     >       Approval & Signature History	Type : Drafting New agreements				- Obert harden
Approval a signature riskory	Notes 2		>	-	start typing
	Approval & Signature History		>	📸 Dates	

- E Help
  - You can also have a look at the Approval and Signature Workflow. So you can here view the list of Approvers and signees, as well as the approval and signature statuses.

request Deta	ils Attachments	Approval Center 🥪	ween BLP and A	Milestones			
	proval Criteria :						
Agreement Ap	proval Status : Appro	ved					
	Maria Dave Ap	proved					
1	Show Summary		🕑 Open (	Contract/Document			•
_							

• Additionally, clients can track contract milestones, and add new milestones as well from the client portal.





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

Thank you!

Change Password