

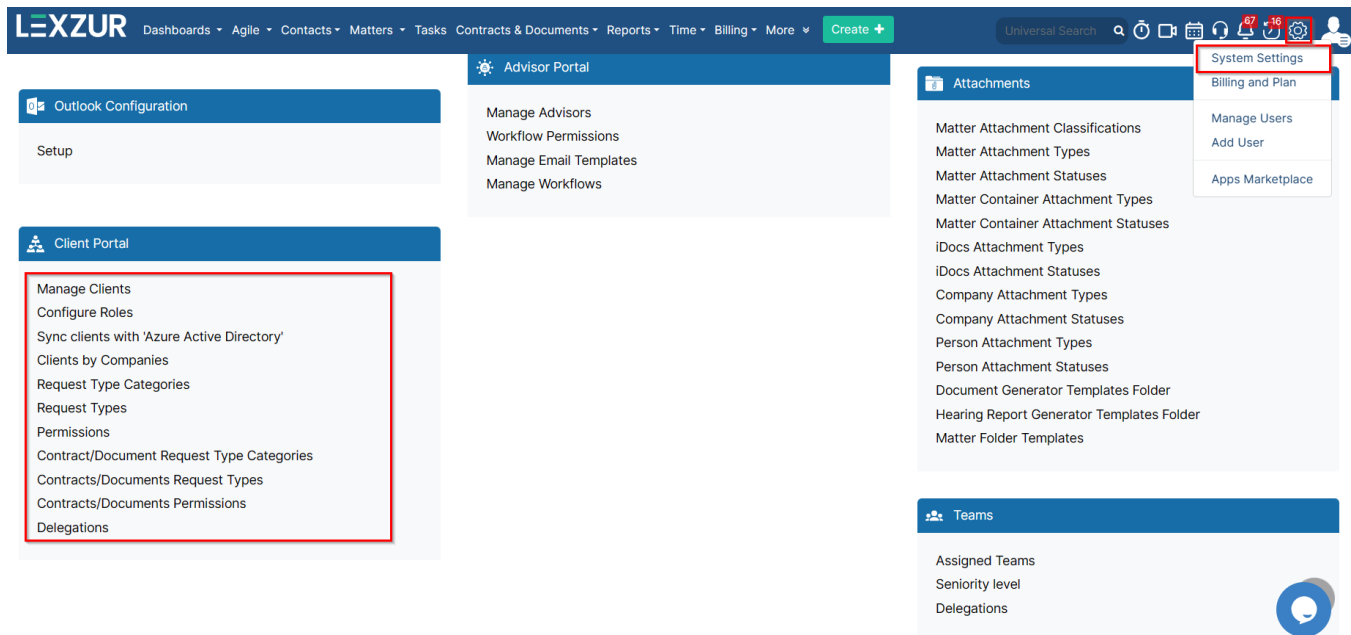
How to Configure the Client Portal?

Objectives

- [How to manage your clients?](#)
- [How to Configure Roles?](#)
- [How to add a new request type category?](#)
- [How to add a new request type?](#)
- [How to set the permissions?](#)
- [How to add a new contract/document request type category?](#)
- [How to add a new contract/document request type?](#)
- [How to set the contract/document permissions?](#)

Steps

In LEXZUR, administrators can configure the client portal from within the system. To do so, navigate to the **System Settings** from the Settings icon in the top right of the main menu, then scroll to the **Client Portal** section where you can manage all its related settings.



- **Manage Clients:**

Clients are client portal users, requesters, or collaborators who are allowed to communicate with the legal team through the portal.



Learn more about how to add and manage client portal users [here](#).

The number of licenses purchased for "Collaborators" is (10) and the number of licenses used is (2)

URL for Clients: <https://site.app4legal.com/11338/modules/customer-portal/> [Copy URL](#)

| Clients | | | | | | | | |
|-----------------|-----------|--------------|-------------------------------|--------------|--------|------------------|-----------------|--|
| Search | | | | | | | | |
| Advanced Search | | | | | | | | |
| Actions | | | | | | | | |
| Add Client | | | | | | | | |
| Export to Excel | | | | | | | | |
| First Name | Last Name | Username | Email | Type | Status | Related Person | User Directory | |
| Jamil | Blaik | jamil | majdharin8@icloud.com | Client | active | Jamil Blaik | Local Directory | |
| Jana | hamshou | Jana | jana.hamshou@app4legal.com | Client | active | Jana hamshou | Local Directory | |
| karim | el ghoché | kghosh | karim.ghosh@app4legal.com | Client | active | karim el ghoché | Local Directory | |
| nathalia | Edwards | nathalia | damonhar23@gmail.com | Client | active | nathalia Edwards | Local Directory | |
| martin | john | martin | omran_85@live.com | Both | active | martin john | Local Directory | |
| Stephan | luiz | Stephan luiz | omran.hariri@app4legal.com | Client | active | Stephan luiz | Local Directory | |
| Hussein | Jardali | Hussein | hussein.jardali@app4legal.com | Client | active | Hussein Jardali | Local Directory | |
| romero | atlas | romero | omranhariri29@gmail.com | Collaborator | active | | Local Directory | |

• Configure Roles:

LEXZUR allows you to configure roles for users based on company hierarchy, enabling you to specify the manager for each user.



Use this [guide](#) to learn how to configure roles and use them in the approval and signature process.

• Clients by Companies:

From this page, you can view the list of clients based on their related companies by simply selecting the company name from the list.

Company

Branding Company

Total Records: 5

| First Name | Last Name | Email | Status | User Directory | Department |
|------------|-----------|-------------------------------|--------|-----------------|------------|
| Carol | Mourawed | caroline.moraod@app4legal.com | active | Local Directory | |
| Rim | Smith | RimSmith@gmail.com | active | Local Directory | |
| Elise | Khoury | elise.khoury@app4legal.com | active | Local Directory | |
| Ziad | Abdullah | ZiadAbdullah@gmail.com | active | Local Directory | |
| Micheal | Cavin | michealcavin30@gmail.com | active | Local Directory | |

• Request Type Categories:

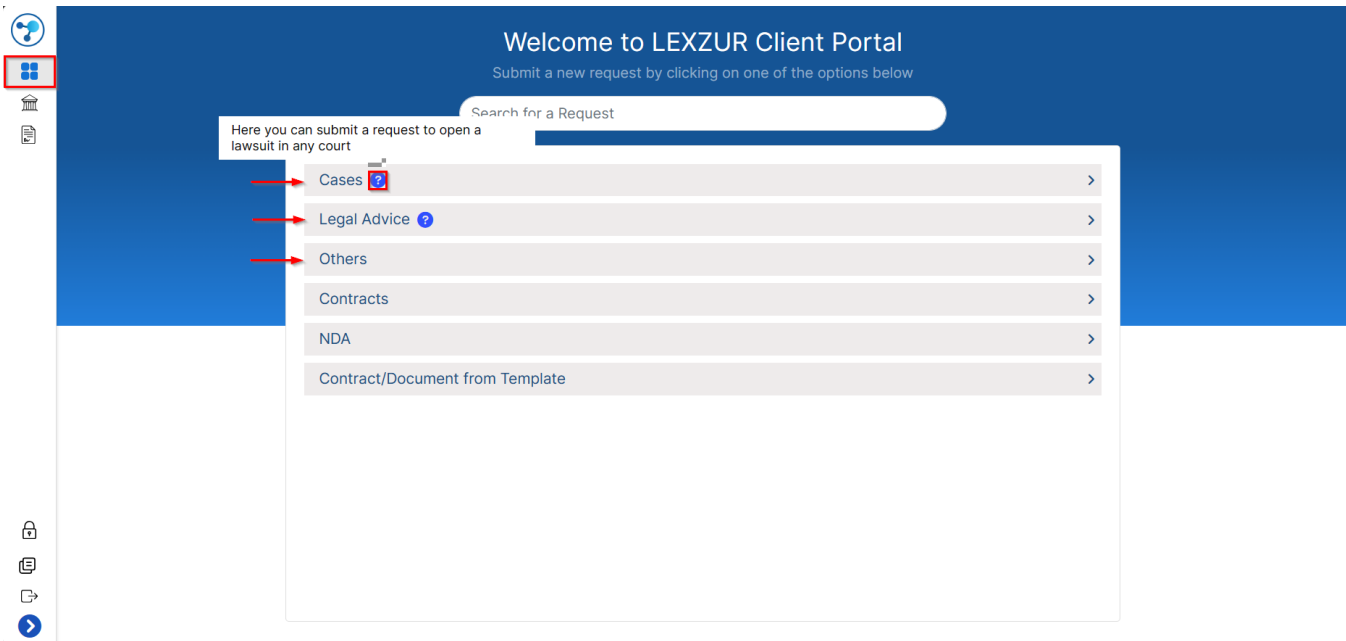
Add a new category for the requests that will be visible to your clients through the portal. You will later create request types that fit into one of these categories.

Settings / Request Type Categories / [Add](#)

Total Records: 3

| Name | Description | Edit | Delete |
|--------------|---|------|--------|
| Cases | Here you can submit a request to open a lawsuit in any court | | |
| Legal Advice | Here you can request a legal advice from the legal affairs department | | |
| Others | | | |

Accordingly, the client portal's home page will be divided between each category and its corresponding requests.



Request Type:

Request Types are the predefined forms set by the legal team to allow their clients to request matters or cases from the portal.

The process is as simple as creating an online form. Start by adding a new one using the "Add Request Type" hyperlink.

Settings / Request Type / [Add Request Type](#)

Total Records: 13

| Name | Applicable on | Practice Area | Request Type Categories | Actions |
|-------------------------------|------------------|-------------------|-------------------------|---------|
| Administrative Cases | Litigation Case | Administrative | Cases | |
| Arbitration Case | Litigation Case | Arbitration | Cases | |
| Commercial Cases | Litigation Case | Commercial | Cases | |
| Commercial Consultation | Corporate Matter | Commercial | Legal Advice | |
| Issuance of power of attorney | Corporate Matter | Power of Attorney | Others | |
| Legal Opinion | Corporate Matter | Legal opinion | Legal Advice | |
| Legal Opinion | Corporate Matter | Administrative | Legal Advice | |
| Request a corporate matter | Corporate Matter | Consultation | Legal Advice | |

The Request Type form has many important fields:

- **Name:** Name of the Request Type, for example, "Legal Request".
- **Request Type Category:** This is the category associated with this request type.
- **Applicable on:** Specify if this request type is applicable to Corporate Matters or Litigation Cases.
- **Practice Area:** For this particular category, select the relevant practice area.
- **Description:** A short hint that describes the request type and when it should be used to make it easy for users.

[Settings](#) / [Request Type](#) / Edit Request Type

Request Type

Name *
?

Request Type Category *

Cases

Applicable on *

Litigation Case

Practice Area *

Administrative

Link

?

Description
?

The default fields of the Request Type are the mandatory fields in a request. They are by default filled in every Request Type to be designed. The fields are Name, Priority, and Assigned Team. The administrator can set them as visible so that the client can fill them in.

- **Add Field:** select from a pool of fields the needed fields to appear in the Request Type. The Fields that are not mandatory in a request can be ordered in the same way that they are added. They can be set as not Required with no need to add a Default Value for them.
- **Display Name:** could be changed as desired.
- **Default Value:** it is the preset value that the admin should add if a mandatory field is set to be hidden.
- **Description:** a short hint under the field to indicate the descriptive need of it.
- **Actions:** to change the field's order and if you want to delete non-mandatory fields.

Add Field

Description

?

| Field | Display Name | Required | Visible | Default Value | Description | Actions |
|---------------|--|--------------------|--------------------|----------------------------|--|----------------|
| Name | <input type="text" value="Name"/> | Yes | Yes ▼ | | <input type="text" value="short hint on the field"/> | |
| Priority | <input type="text" value="Priority"/> | Yes | Yes ▼ | | <input type="text" value="short hint on the field"/> | |
| Assigned Team | <input type="text" value="Assigned Team"/> | Yes | No ▼ | <div>Litigation Team</div> | <input type="text" value="short hint on the field"/> | |
| Description | <input type="text" value="Description"/> | Yes ▼ | Yes ▼ | | <input type="text" value="Describe your case"/> | ✕ |
| Value | <input type="text" value="Value"/> | Yes ▼ | Yes ▼ | | <input type="text" value="short hint on the field"/> | ✕ |

In the notification section, you can specify the user who will receive a notification once a new request is created.

Notifications

Send notification by email when creating a new request

Notify (To)


Notify (CC)

Save

• Permissions:

The Permissions page will display all the Transitions in the system.

The admin can grant the needed permissions so that the client can be able to change the Status from within the Client Portal interface.

 This strictly depends on the business need of every client.



If there is permission granted to the clients to change a Status of a matter to for example "In Progress" while there are configured SLAs related to this Status, the SLA counters will automatically start the counters. Hence, granting the Client such permissions should be dealt with care.

[Settings](#) / [Client Portal - Permissions](#)

Permissions

Select Workflow

Legal Team Review

Search

| Transition | From | To | Allow |
|-------------|---------------|--------------------|-------------------------------------|
| In Progress | 1-Review | 2-In Progress | <input checked="" type="checkbox"/> |
| closed | 1-Review | 3-Closed | <input checked="" type="checkbox"/> |
| Rejected | 1-Review | Rejected | <input type="checkbox"/> |
| In progress | 1-Review | Pending Internally | <input type="checkbox"/> |
| Closed | 2-In Progress | 3-Closed | <input checked="" type="checkbox"/> |

Save

Reset

Select All

Check the transition to grant each permission to all Client Portal Users.

- **Contract/Document Request Type Category:**

The contract request type categories are managed through the contract/document request type categories under the client portal section.

Using the Add hyperlink, the administration can add a new Request Type category. You will later create contract request types that fit into one of these categories.

[Settings](#) / [Contract/Document Request Type Categories](#) / [Add](#)



Total Records: 2

| Name | Description | Edit | Delete |
|-----------|-------------|----------------------|------------------------|
| Contracts | | Edit | Delete |
| NDA | | Edit | Delete |

Accordingly, the client portal's home page will be divided between each category and its corresponding requests.



• Contract/Document Request Type:

Contract/Document Request Types are the predefined forms set by the legal team to allow their clients to request contracts from the client portal.
















They are managed through the Contract/Document Request types under the Client Portal settings section.

Using the actions on the left, the admin can edit, delete or hide/un-hide a Request Type from the Portal.

Using the Add Request Type hyperlink the administration can add a new Request Type.

[Settings](#) / [Request Type](#) / [Add Request Type](#)

Total Records: 6

| | | | |
|-------------------------------|-----------------------------|------------|---|
| Drafting New Agreement | Drafting New agreements | Agreements |    |
| Employment Contract Review | General employment contract | Contracts |    |
| Non Disclosure Agreement | Non-disclosure Agreement | Agreements |    |
| Request a Contract for Review | Sales Agreement | Contracts |    |
| Sales/Purchase Agreement | Purchase Agreement | Agreements |    |

The Request Type form has many important fields:

- Name: name of the Request Type; for example "Service Agreement".
- Request type category: This is the category associated with this request type.
- Type: The contract/Document type.
- Sub-type: if there is any.
- Description: A short hint that describes the request type and when it should be used.

Request Type

Name *
Drafting New Agreement
?

Request Type Category *
Agreements

Type *
Drafting New agreements

Sub type
None

Link
Enter Link Url
Enter Link Title
?

Description
?

- **Default Fields of the Request Type:** They are the mandatory fields in a request. They are by default filled in every Request Type to be designed. The fields are Name, Priority, and Assigned Team. The administrator can set them as required so that the client fills them in. Or, as an alternative, one or more of these fields can be set as Not Required and a value by default is preset by the administrator.
- **Add Field:** select from a pool of Fields the needed Fields to appear in the Request Types. The Fields that are not mandatory in a request can be ordered in the same way that they are added. They can be set as not Required without adding a Default Value for them.
- **Display Name:** It could be changed as desired.
- **Default Value:** It is the preset value that the admin should add if a mandatory field is set to be hidden.
- **Description:** is a short hint under the field to indicate the descriptive need of it.
- **Actions:** to change the field's order and if you want to delete non-mandatory fields.

Add Field

Description

?

| Field | Display Name | Required | Visible | Default Value | Description | Actions |
|---------------|----------------------------|----------|---------|--|-------------------------|---------|
| Name | Name of the request | Yes | Yes | | short hint on the field | |
| Priority | Priority | Yes | Yes | | short hint on the field | |
| Assigned Team | Assigned Team | Yes | No | Corporate Team | short hint on the field | |
| Description | Description | Yes | Yes | | short hint on the field | ✕ |
| Date | Date | No | Yes | | short hint on the field | ✕ |
| Attach File | Attach File related to 123 | No | Yes | Hide To be Approved: <input type="checkbox"/> Hide To be Signed: <input type="checkbox"/> | short hint on the field | ✕ |
| Attach File | Attach File | No | Yes | Hide To be Approved: <input type="checkbox"/> Hide To be Signed: <input type="checkbox"/> | short hint on the field | ✕ |

Notifications

In the notification section, you can specify the user who will receive a notification once a new contract/document request is created.

Notifications

Send notification by email when creating a new request

Notify (To)

Includes users or external emails

Notify (CC)

Includes users or external emails

Save

- **Contract/Document Permissions:**

The Permissions page will display all the Transitions in the system.

The admin can grant the needed Permissions so that the client will be able to change the Status from within the Client Portal interface.



This strictly depends on the business need of every Client.



If there is permission granted to the Clients to change a Status of a document/contract to for example "In Progress" while there are configured SLAs related to this status, the SLA counters will automatically start the counters. Hence, granting the Client such permissions should be dealt with care.

[Settings](#) / Client Portal - Permissions

Permissions

Select Workflow

Service Agreement

Search

| Transition | From | To | Allow |
|-------------|---------------|---------------|-------------------------------------|
| In Progress | 1-Executed | 2-In Progress | <input checked="" type="checkbox"/> |
| Done | 2-In Progress | Done | <input type="checkbox"/> |

If the Transition is checked, this means that permission is granted to all Client Portal Users.

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

Thank you!