

How to Import Client Portal Users From Active Directory

Objectives:

- Enable SSO
- Import Client Portal Users From Active Directory

Steps:

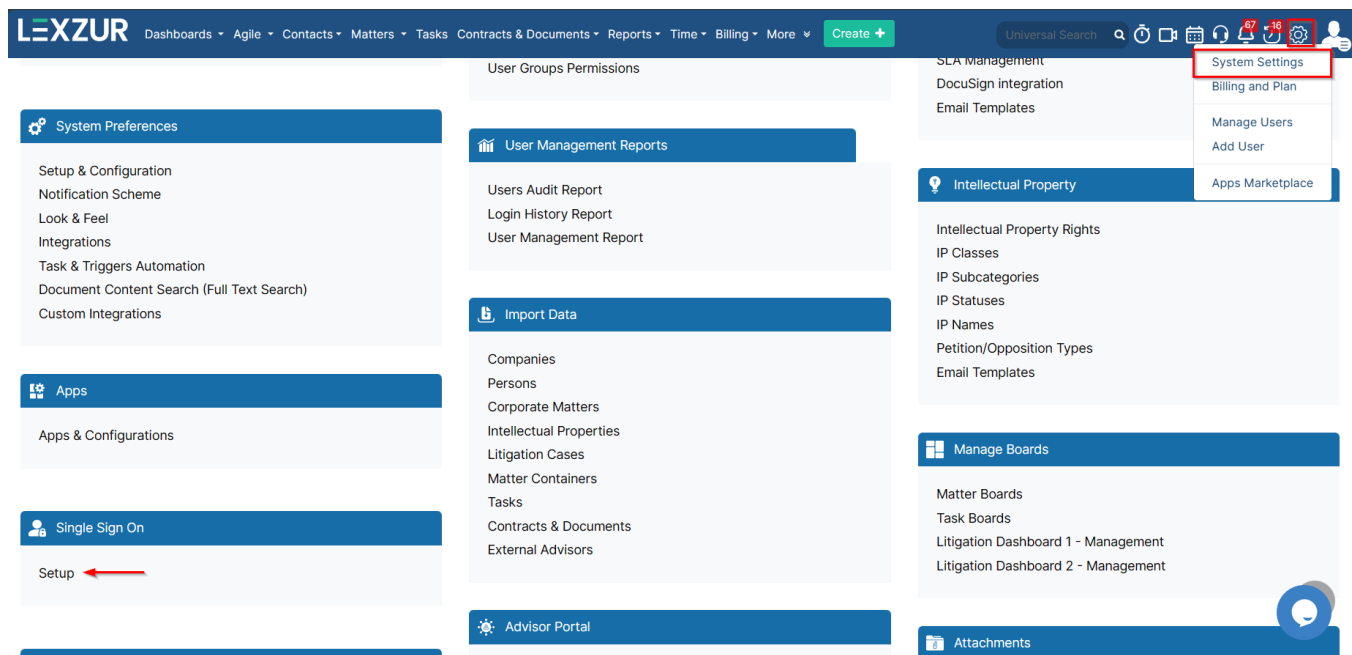
To enable seamless sign-in experiences for your client portal users using their Microsoft accounts, you can integrate LEXZUR with your Azure Active Directory.

The process begins with setting up and configuring your application in Microsoft Azure.

✓ Learn more on how to setup and configure your Azure Active Directory in this [guide](#).

Subsequently, you need to activate Single Sign-On (SSO) within LEXZUR.

Navigate to the Single Sign-On configuration in the system settings



Here you'll input the **Client ID** and **Client Secret**, add metadata files if necessary, and decide whether to synchronize user groups.

Settings / Single Sign On Configuration

☐ None

☒ **Azure Active Directory** ?

☐ 1 Onelogin ?

☐ Others

Configuration

Client ID* 123

Client secret* 123

Metadata File No file chosen

User Group Synchronization No

Now, to import client portal users from Azure AD, navigate to "Manage Client" under the Client Portal settings:

Client Portal

Manage Clients

Configure Roles

Sync clients with 'Azure Active Directory'

Clients by Companies

Request Type Categories

Request Types

Permissions

Contract/Document Request Type Categories

Contracts/Documents Request Types

Contracts/Documents Permissions

Delegations

From "Actions," click on "Import clients from Azure AD."

Settings / Client Portal - Manage Clients / Add Client

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

URL for Clients: <https://site.app4legal.com/7691/modules/customer-portal/>

Copy URL

URL for clients using Azure Active Directory https://site.app4legal.com/7691/modules/customer-portal/users/login_idps/azure_ad

Copy URL

Clients

Advanced Search

Actions

	First Name	Last Name	Username	Email	Type	Status	User Directory	Company	
	Tina	Andrew	Tina	TinaA@gmail.com	Collaborator	inactive	Local Directory		
	Sam	Abed	sa	soheir.zarzur@gmail.com	Both	inactive	Local Directory		
	Jana	Jana	Hamshou	jana.hamshou@app4legal.com	Collaborator	inactive	Local Directory		
	Sara	Malbeck	SaraM	saramalbeck1@gmail.com	Both	active	Local Directory	Global Tech	
	Alvah	Scott	Alvah Scott	AlvahScott@outlook.com	Client	inactive	Local Directory		
	Jim	batz	jimbatz@gmail.com	jimbatz@gmail.com	Both	active	Local Directory		
	Adam	Christopher	Adam	adenchristopherr@gmail.com	Both	active	Local Directory	IT Department	IT Expert
	Micheal	Cavin	MichealCav	michealcavin30@gmail.com	Both	active	Local Directory	Branding Company; HR Department	

Add Client

Import Clients from "Azure AD"

Export to Excel

Enter the user details, including the username and access type (client, collaborator, or both).

Import Clients from Azure Active Directory

Users to import *

Start typing to select from possible matches.

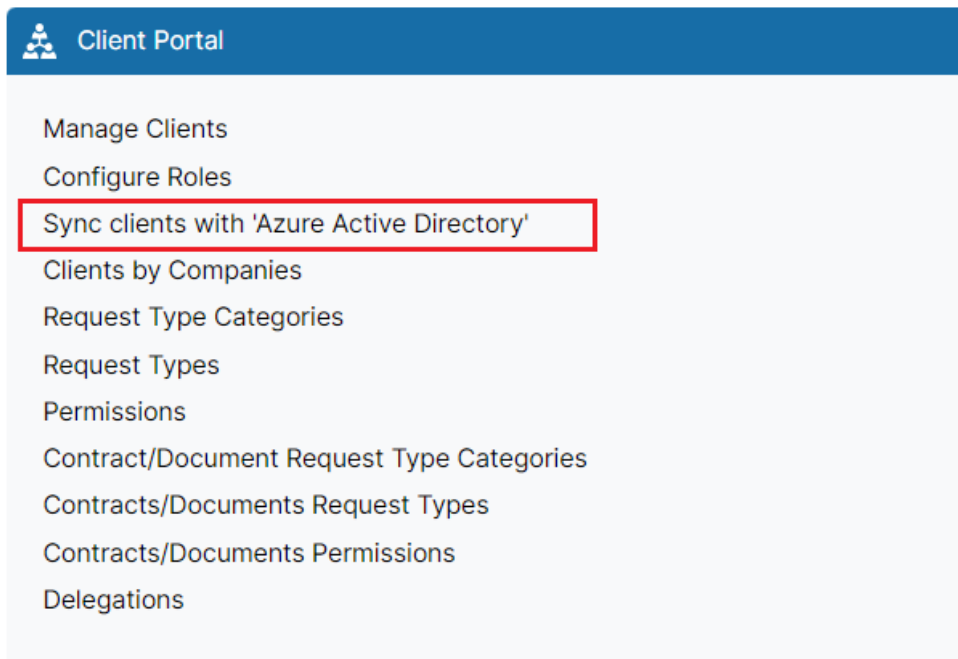
Access type*

Company

Person / Company Category

[Save](#)

For importing a group of users, head to Settings, choose "Sync clients with Azure Active Directory" under the client portal section



Select the AD group and Company, and initiate the synchronization process.

Sync clients with 'Azure Active Directory'


Azure Active Directory group *

Company

[Stop Syncing](#)

To enable automatic sync on a daily basis
Reach out to the support, click [here](#).

Clients will be then able to access the client portal via the link shared by administrators.


**Client Portal**
by LEXZUR


Welcome to LEXZUR Client Portal

☐ Keep me signed in

Sign In

Or

 Sign in using Azure

 Sign in using OneLogin

Don't have an account? [Sign Up](#)



The URL for clients using Azure Active Directory is accessible from the top of the manage client portal users page.

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

Thank you!