

How to Manage Hearing Visibility From the Client Portal

Objectives:

- Show or hide hearing details from the client portal

Steps:

Hearing details can now be set hidden by default from the requesters, with the option to make them visible on a per-hearing basis.

In the "Add Hearing" and "Edit Hearing" sections, an option has been introduced to show or hide the hearing in the client portal.

New Hearing

Name:

Administrative Consultation for Adam

Start typing to select from possible matches of matter, client or use the Matter ID ex. M10

Stage: Appeal Court Select

Hearing Type:

+ Add Hearing Type

select an option

Hearing Date: 2024-01-17 Time: 10:00

Assignee(s):

Start typing

Maria Dave

Time Spent: 1:00

☒ Show hearing details in client portal

Save

Save & Add New

Cancel

Edit Hearing

Name:

Administrative Consultation for Adam

Start typing to select from possible matches of matter, client or use the Matter ID ex. M10

Stage: Appeal Court Select

Hearing Type:

+ Add Hearing Type

Case List

Hearing Date: 2023-12-22 Time: 10:00

Assignee(s):

Start typing

Sam Marven

Carolina Robinson

Time Spent: 1:00

☒ Show hearing details in client portal

Judged?: No Show More

Save

Cancel

 For previous hearings, they will be made visible if the related matter is set to be visible.

This feature empowers users to tailor the visibility of hearing information based on their preferences and the specific requirements of the client portal interface.

You have the option to enable a default setting from the **setup & configuration** in the settings. This allows you to choose whether you prefer the hearing details to be shown or hidden by default.

| | | | |
|----------------------------------|--------------------------------------|-----------------------------|------|
| Active Directory | Matter Containers Page name | Matter Containers | Save |
| Adobe Sign Integration | Contract/Document Creation Page name | | Save |
| Advisor Portal | Contract/Document Page name | Contracts / Agreement | Save |
| Contract/Document Default Values | Homepage Welcome Prompt | Submit a new request by cli | Save |
| Client Portal | New Sign Ups Accepted Domains | | Save |
| Default Values | New Sign Ups Approval Type | Approved by User | Save |
| Delegation | New Sign Ups Approval User | Carolina Robinson | Save |
| DocuSign Integration | Enable Approval & Signature History | No | Save |
| emSigner Integration | Hide hearing details by default | No | Save |
| External Links | Show Matter Container | No | Save |
| Hearing Verification Process | | | |
| Document Content Search | | | |
| Maker Checker Control | | | |
| Menu External Links | | | |
| Notifications | | | |
| Outgoing Mail | | | |
| Password Policy | | | |
| Reminders | | | |
| Sayen Integration | | | |

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

Thank you!