How to Use Client Portal Sign Up Feature

Objectives

- Enable Sign Up Feature
- Sign up to the Client Portal

Steps

Administrators have the option to enable client sign-up directly through the client portal, eliminating the need for manual addition from the main app's configuration page. By sharing the CP URL, clients can set up their accounts themselves.

Enable Sign up

To activate this feature, the administrator must first enable it at the client portal level. This can be done by:

Navigating to system settings -> setup & configuration under system preferences.

LEXZUR Deshboards - Agile - Contacts - Matters - Tasks Contracts	& Documents * Reports * Time * Billing * More v Create +	Universit Statist 🔍 🔿 🗗 🛱 🖗 🔒	0
Opponent Positions Email Templates	() Time Entries	Boards System Settings Party Categories Billing and Plan Manage Workflows Manage Users	
Reminders Reminder Types	Categories Internal Statuses Manage non-business days	Templates Add User Uplaed Contract/Document Forms Add User Approval Center Signature Center Custom Fields	
X System Maintenance License	User Groups User Groups Import Users from Azure Active Directory User Groups Permissions	Applicable Laws Attachment Type Document Generator Templates Folder Folder Templates SLA Management DocuGign Integration	
System Preforences Setup & Configuration Notification Scheme Look & Feel Integrations Task & Triggers Automation	dif User Management Reports Users Audt Report Login History Report User Management Report	Email Templates Intellectual Property Intellectual Property Rights IP Classes	
iask ei ringers Automatou Document Content Search Full Text Search) Custom Integrations Email Customization	 (B), Import Data Companies Persons 	IP Subcategories IP Statutes IP Names Petition/Oppoillion Types Email Templates	

• Then, access the client portal tab and Allow Client Portal User to sign up. Permissions can be granted to allow only collaborators, clients, or both to sign up.

Active Directory			Q
Adobe Sign Integration	Property	Default Value	Actions
Advisor Portal	Allow Clients to Add Contacts and Companies through Requests 🔞	Yes	Save
Contract/Document Default Values			
Client Portal	Allow Attachment Controls 🔞	Yes, regardless of Approval Status 👻	Save
Default Values	Allow feature "Client Portal"	Yes 🔹	Save
Delegation	Allow Client Portal users to sign up	Yes	Save
DocuSign Integration	· · · · · · · · · · · · · · · · · · ·	Type : Both	Save
emSigner Integration		Warn Q	
External Links		maxin Both	
Hearing Verification Process		Collaborator	
Document Content Search	Enable Malti factor Asthenitoriton		save
Aaker Checker Control	Organization Name		Save
Menu External Links	orgunization Humo	LEXZUR Client Portal	Save
otifications	Default Person Category when creating a client user	Client	Save

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It's important to note that this action will consider the available number of collaborator licenses.

Additionally, the administrator has the option to configure the new sign-up approval process. This can be set to either "approved by default" or "approve d by user."

Settings / Setup & Configuration

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

If it's set to "approved by default," any sign-up requests from client portal users will be automatically approved by the system. Otherwise, the selected user should approve any new sign-up request from the client portal and activate their account.

Settings / Setup & Configuration			
Active Directory Adobe Sign Integration	Matter Containers Page name	Matter Containers	Save
Advisor Portal	Contract/Document Creation Page name		Save
Contract/Document Default Values	Contract/Document Page name	Contracts / Agreement	Save
Client Portal Default Values	Homepage Welcome Prompt	Submit a new request by cli	Save
Delegation	New Sign Ups Accepted Domains		Save
DocuSign Integration emSigner Integration	New Sign Ups Approval Type	Approved by User	Save
External Links	New Sign Ups Approval User	Carolina Robinson	Save
Hearing Verification Process	Enable Approval & Signature History		Save
Document Content Search Maker Checker Control	Hide hearing details by default	Adam Christopher Aleen Peterson	Save
Menu External Links	Show Matter Container	Alice Jones Carolina Robinson	Save
Notifications		James Marven	*
Outgoing Mail			
Password Policy			

Sign up to the Client Portal

The administrator should share the URL for Clients with the client portal user. To do so:

- Navigate to the System settings -> client portal -> Manage clients
 Copy and share the URL in the way that suits you.

Settings / Cli	ent Portal - Ma	nage Clients / Add Client									
				Th	e number of licenses pur	chased for "Collaborators" is (10) and the	number of licenses used is (10)				
				mer-portal/ Copy URL al.com/7691/modules/custor	ner-portal/users/log	in_idps/azure_ad Copy URL					
Clients		Search		Q,						Advanced	Actions -
	~ First	Name V Last Nam	e v Username	~ Email	~ Туре	~ Status	 Related Person 	 User Directory 	~ Company	~ Position	~ Phone

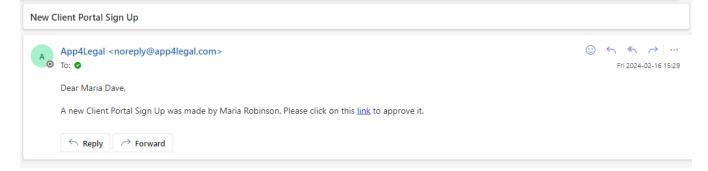
- The client portal user will access the link which will redirect them to the Client Portal login page
 In this case, they don't have an account to sign in. They will have to click on sign up

Client	Portal	
Welcome to LEXZU	by LEXZUR R Client Portal	
Password Keep me signed in Sign In	Rengot your password?	
Or Sign in using Azure O Don't have an accou	Sign in using OneLogin	

• They should fill out their First Name, Last Name, Username, and Email and create their own Password.

Client Portal by LEXZUR Welcome to LEXZUR Client Port	al
First Name Last Name GUsername	
⊠ Email	Ø
Confirm Password	Ø

It's important to note that if the setting is configured as "approved by user" when a client portal user signs up, their account will be initially inactive. The responsible user will receive an email notification to approve the new sign-up and activate the account.



Administrators can also do this manually from the Client Portal Settings Manage Clients and choose "Approve" next to the new user name.

Settings / Client Portal -	Manage Clients	/ Add Client											
					The number of lice	nses purchased for "Collaborate	ors" is (10) and the number of li	censes used is (10)					
RL for Clients: http	ps://site.app	4legal.com/769	1/modules/customer-p	copy URL									
RL for clients using	Azure Activ	e Directory htt	ps://site.app4legal.co	m/7691/modules/customer-po	rtal/users/login_idps/az	ure_ad Copy URL							
Clients	Sear	ch			۹,							Advanced Se	Action:
× Fi	irst Name	 Last Name 	✓ Username	~ Email	- Туре	~ Status	 Related Person 	V User Directory	~ Company	~ Position	~ Phone	~ Mobile	Banned
o 🔍 🔍 M	taria	Robinson	Maria.R	lexzurtraining@gmail.com	Client	inactive	Maria Robinson	Local Directory					No
Ban / Unban		Shashaa	Simona	simona.shashaa@pxgeo.com	Client	inactive	Simona Shashaa	Local Directory					Yes
Flag to Change Passv	word	Jones	jimmy	omranhariri29@gmail.com	Client	active	Jimmy Jones	Local Directory	HR Department				No
Approve Activate / Deactivate	_	Zeidan	manatz	manal.zeidan@lexzur.com	Both	active	Manal Zeidan	Local Directory					No
	tephan	luiz	stephan	omran.hariri@app4legal.com	Both	active	Stephan Luiz	Local Directory					No
🛑 SI													
 SI The second seco	ima	Andrew	Tima	TimaA@gmail.com	Collaborator	inactive	test testing	Local Directory					Yes
-		Andrew Abed	Tima sa	TimaA@gmail.com soheir.zarzour@gmail.com	Collaborator Both	inactive active	test testing Sam Abed	Local Directory Local Directory					Yes

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

Thank you!