

# How to Use Client Portal Sign Up Feature

## Objectives

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

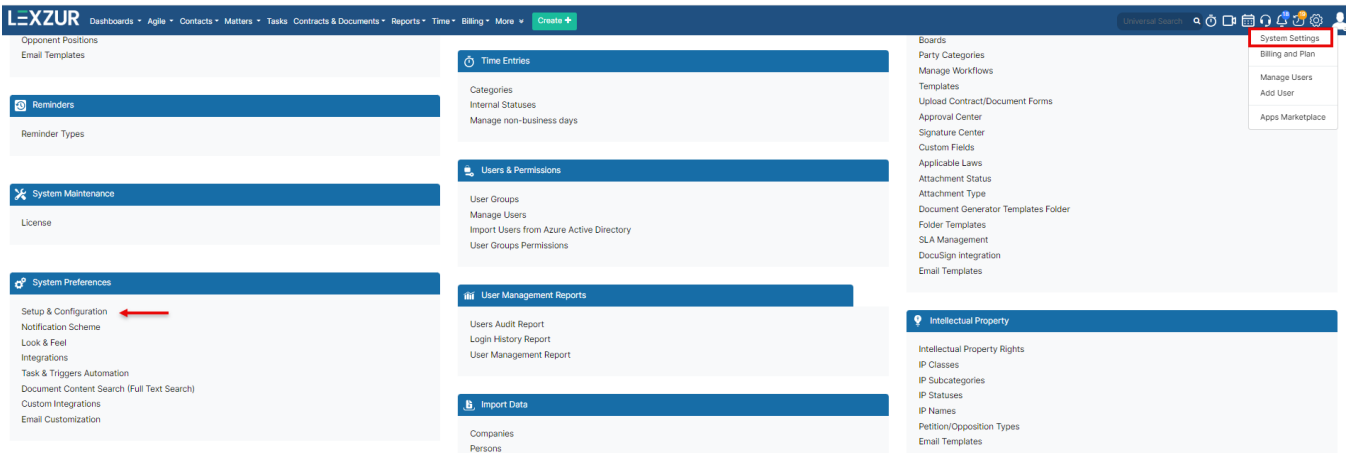
## Steps

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.

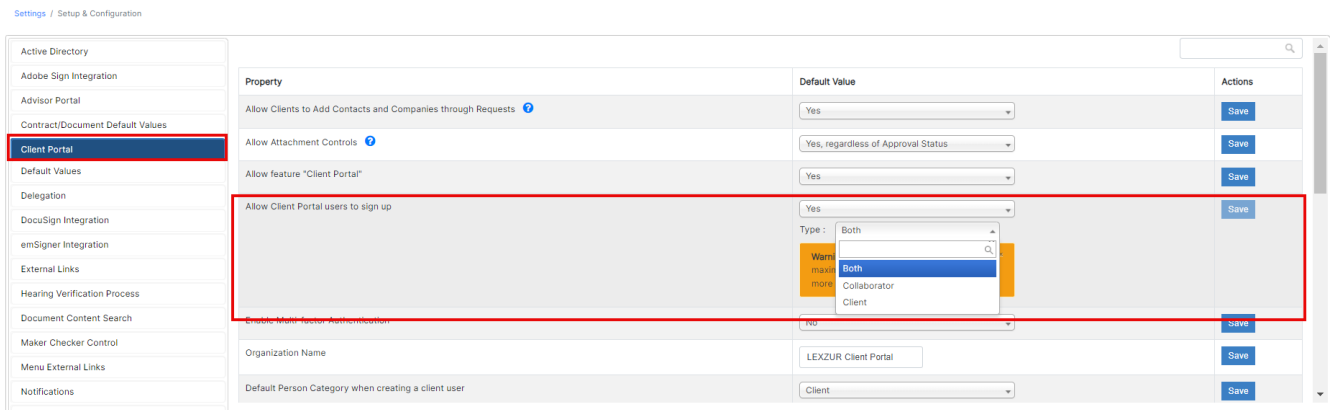
### Enable Sign up

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**.



- 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.



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 **"approved by user."**

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
<b>Client Portal</b>	New Sign Ups Accepted Domains		Save
Default Values	New Sign Ups Approval Type	Approved by User	Save
Delegation	New Sign Ups Approval User	Approved by Default	Save
DocuSign Integration	Enable Approval & Signature History	Approved by User	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			

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.

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
<b>Client Portal</b>	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		Save
emSigner Integration	Hide hearing details by default		Save
External Links	Show Matter Container		Save
Hearing Verification Process			
Document Content Search			
Maker Checker Control			
Menu External Links			
Notifications			
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.

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](#)

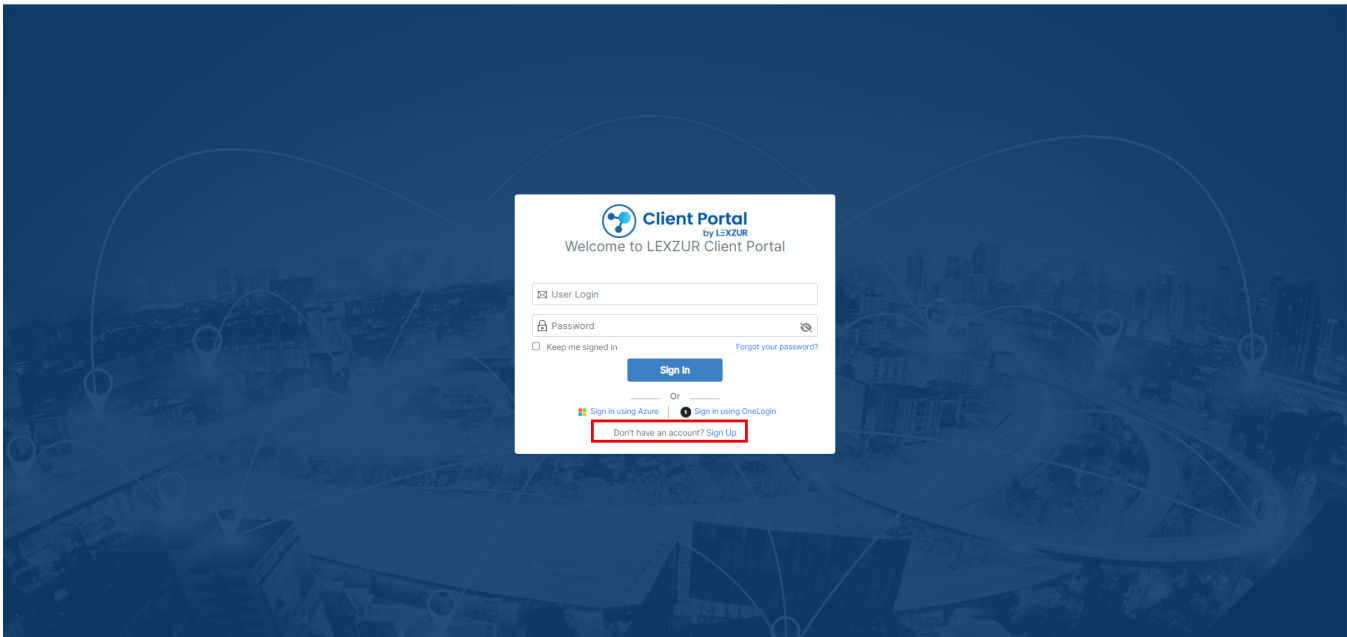
URL for clients using Azure Active Directory: [https://site.app4legal.com/7691/modules/customer-portal/users/login\\_idps/azure\\_ad](https://site.app4legal.com/7691/modules/customer-portal/users/login_idps/azure_ad) [Copy URL](#)

Clients

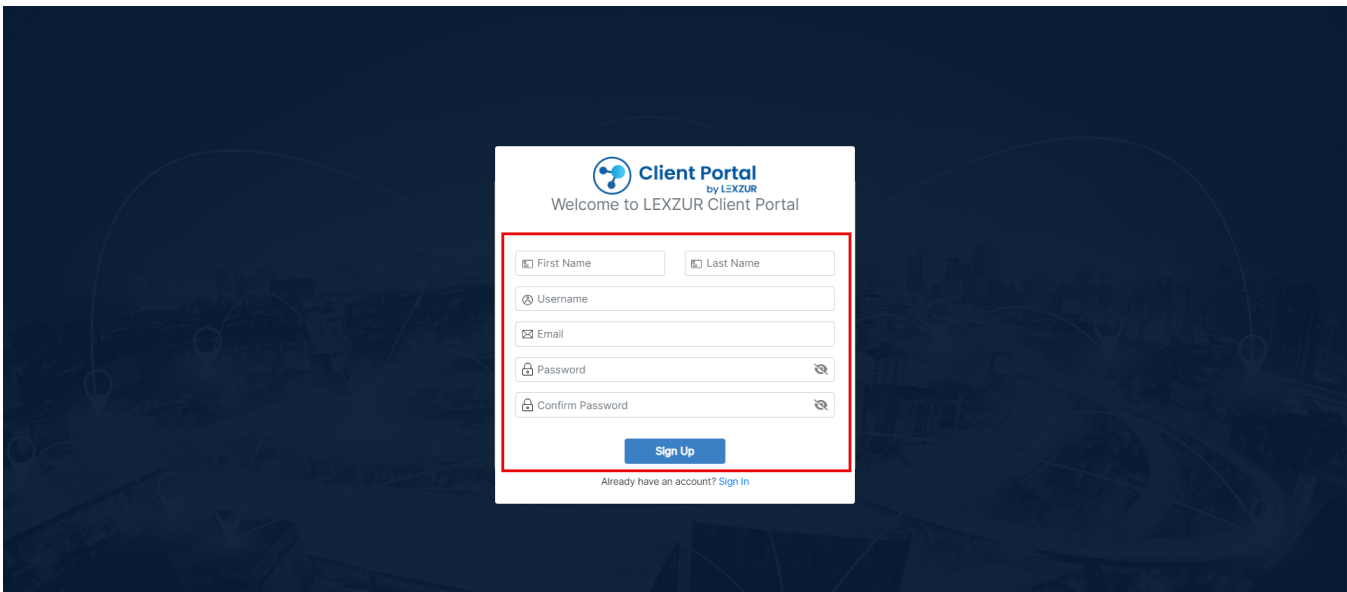
Advanced Search [Actions](#)

First Name Last Name Username Email Type Status 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**



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



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.

## New Client Portal Sign Up



App4Legal <noreply@app4legal.com>

To: ✓



Fri 2024-02-16 15:29

Dear Maria Dave,

A new Client Portal Sign Up was made by Maria Robinson. Please click on this [link](#) to approve it.

Reply

Forward

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 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](https://site.app4legal.com/7691/modules/customer-portal/users/login_idps/azure_ad) [Copy URL](#)

Clients

Search

Advanced Search [Actions](#)

	First Name	Last Name	Username	Email	Type	Status	Related Person	User Directory	Company	Position	Phone	Mobile	Banned
<div><div>10</div><div>Ban / Unban</div><div>Flag to Change Password</div><div>Approve</div><div>Activate / Deactivate</div></div>	Maria	Robinson	Maria R	lexzurtraining@gmail.com	Client	inactive	Maria Robinson	Local Directory					No
		Shashaa	Simona	simona.shashaa@onges.com	Client	inactive	Simona Shashaa	Local Directory					Yes
		James	Jimmy	omianharin2@gmail.com	Client	active	Jimmy Jones	Local Directory	HR Department				No
		Zeidan	manalz	manal.zeidan@lexzur.com	Both	active	Manal Zeidan	Local Directory					No
	Stephan	Luiz	stephan	omian.harii@app4legal.com	Both	active	Stephan Luiz	Local Directory					No
	Tina	Andrew	Tina	TinaA@gmail.com	Collaborator	inactive	test testing	Local Directory					Yes
	Sam	Abed	sa	soheir.azour@gmail.com	Both	active	Sam Abed	Local Directory					No
	Jana	Jana	Hamshou	jana.hamshou@app4legal.com	Collaborator	inactive	Jana Jana	Local Directory					Yes

For more information about LEXZUR, kindly reach out to us at [help@lexzur.com](mailto:help@lexzur.com).

Thank you!