


How to Manage Requests Received From the Client Portal

Objectives

- Manage requests received from the client portal

Steps

Whenever a client portal user submits a request from the portal (regarding matters or contracts), both the legal team and the assignee can be notified via email.

 Administrators have the flexibility to configure who should be notified based on their preferences.

1 of 1,787

LEXZUR Client Portal - M415-Administrative Consultation for Adam Added from Client Portal

Inbox x

Lexzur <noreply@app4legal.com>

to caroline.moraod@lexzur.com, JonesAAlice21@gmail.com

4:17 PM (0 minutes ago)

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Activity Alert

Requester Info

Name

Julia Marven

Username

Julia

Email

marvenjulia@gmail.com

Department

HR

Details

Also, they will be able to view the request from the system.

Let's take an example of a matter request. Once submitted it will be listed automatically under **Matters Corporate Matters/ Litigation Cases or Intellectual Property grids**

Corporate Matters

All

Save as

Export

Tools

1 - 50 of 167 items

Search

Advanced

Columns

<input type="checkbox"/>	ID	Assignee	Client Name	Name	Practice Area	Workflow Status	Important Development
<input type="checkbox"/>	M00000401			Legal opinion for Jimmy	Legal opinion	Open	
<input type="checkbox"/>	M00000400	Sam Marven	BLP industry	Legal opinion	Legal opinion	In Progress	
<input type="checkbox"/>	M00000399	Carolina Robinson		Administrative Consultation for Adam	Civil	Pending	[2024-02-15 12:37:00]: v
<input type="checkbox"/>	M00000397		BLP industry	Legal opinion for Service Agreement	Legal Service	Open	
<input type="checkbox"/>	M00000395		abc	legal opinion	Corporate	Open	
<input type="checkbox"/>	M00000391	Jimmy Peterson	damon John	Legal Opinion for Damon	Legal opinion	Open	
<input type="checkbox"/>	M00000388	Carolina Robinson		matter	Corporate	Open	
<input type="checkbox"/>	M00000384	Sam Marven	Abdulrahmane Diego	Dossier de société- Bank	Dossier	Open	
<input type="checkbox"/>	M00000382	James Marven	bic services	Legal consultancy for BLC	legal consultancy	Open	
<input type="checkbox"/>	M00000381		Manal Zeidan	test	Corporate	Open	
<input type="checkbox"/>	M00000376	Alice Jones		Legal opinion	Legal opinion	In Progress	



All matters requested from the client portal will be marked with a green line beside them.

When clicking on the Matter ID or name, you'll be redirected to the matter page, where you can review the request details, start working on the matter, and take necessary actions.

The legal team can check the requester of the matter and the related company of the requester from the people section.

The screenshot shows the 'Legal opinion for Jimmy' matter page. The top bar includes the matter ID 'M00000401', the name 'Legal opinion for Jimmy', and the category 'Matter - Corporate Matter'. Below this are status buttons: 'Closed', 'Done', 'In Progre...', and 'More'. There are also 'Save' and 'Actions' buttons. The left sidebar contains a 'General Info' section with links to 'Custom Fields', 'External Advisor', 'Related Contributors', 'Notes', and 'History'. The main content area is divided into two sections: 'General Info' and 'People'. The 'General Info' section includes fields for 'Name' (Legal opinion for Jimmy), 'Practice Area' (Legal opinion), 'Workflow Status' (Open), 'Workflow used' (System Workflow (default)), 'Internal Ref Number', 'Matter Container' (Start typing), 'Matter Priority' (High), 'Stage' (None), 'Client Name' (Start typing), 'Value (USD)' (10,000), and 'Description' (legal opinion related to...). The 'People' section includes fields for 'Assigned To' (Corporat...), 'Assignee' (Choose ...), 'Referred By' (Start typing), 'Requested By' (Stephan Luiz), and 'Company Name' (Global Tech (G-Tech)).

Certain changes and matter details, such as status, important developments, assignee, description, and more, will be visible to requesters. When the legal team begins working on the matter, making adjustments to the workflow and adding important developments, these updates will be reflected within the client portal.

Furthermore, both the legal team and the requester can communicate using the **Notes** section. The legal team can utilize these notes to send comments to the requester or communicate internally with other team members.

The screenshot shows the 'Notes' section of the 'Legal opinion for Jimmy' matter page. The top bar is the same as the previous screenshot. The left sidebar is also the same. The main content area is divided into two sections: 'Notes' and 'History'. The 'Notes' section includes a tab for 'Notes' (highlighted with a red box) and a tab for 'Emails'. Below the tabs are buttons for 'Add Note' and 'All Notes'. A list of notes is displayed, with the first note from 'Stephan luiz (Portal User)' dated '2024-02-20 17:38' containing the text 'Attached are the pending documents' (highlighted with a red box). The second note from 'Jimmy Peterson' dated '2024-02-20 17:35' contains 'URL's (0)' and '0 Document(s)'. The 'History' section is currently empty.



Example of a matter page from the Client Portal

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Home

Matters/ Cases

Contracts / Agreement

Signature

Change Password

Help

Out of Office

Stephan luiz

M00000401 Legal opinion for Jimmy

Details

Attachments

Status : Pending

Priority : High

Assigned Team : Corporate Team

Value : 10,000.00 (USD)

Practice Area : Legal opinion

Important Development : [2024-02-20 17:35:40]: Need all the related documents

Due Date : 2024-02-29

Description : legal opinion related to..

Comments 0

Format

B I U

People

Created By : Stephan luiz

Assigned To : Unassigned

Requested By : Stephan luiz

Watchers : Start typing

Dates

Requested on : 2024-02-20 17:21

Last Update : 2024-02-20 17:35

Additionally, requesters will have access to attachments related to their requests. Consequently, the legal team can manage the visibility of any files or folders they wish to share with client portal users.

 Attachments marked with the green line indicate that they are visible to the requester.

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Dashboards

Agile

Contacts

Matters

Tasks

Contracts & Documents

Reports

Time

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M

M00000401 Legal opinion for Jimmy

Matter - Corporate Matter

General Info

Tasks

Reminders

Emails

Bills

Attachments

Expenses

Time Entries

Invoices

Matters

Contracts & Documents

Settings

Financial

Trust

Paid

Due

Billable

Archived Hard Copies

Lexzur Documents

Google Drive

OneDrive

Dropbox

URL's

Download

Rename

Open in

Move

Copy To

Copy Link

Share with

List versions

Show in Advisor Portal

Show in Client Portal

Convert to PDF

Delete

M401

1 Selected

	Name	Type	Status	Keywords	File Size	Added On	Added By	Modified By
	Matter Notes Attachments				-	2024-02-20 19:38:22	Stephan luiz	Stephan lu
	Legal Docs.docx		1-Draft		12.4 kB	2024-02-29 16:24:57	Carolina Robins...	Carolina F

The same principle applies to contract requests. Once sent from the portal, they will be accessible from the Contracts & Documents list. The Contract team can then handle and process these requests like any other contract in the system.

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Contracts & Documents

All

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Export ⌵ Tools ⌵

ID	Name	Type	Currency	Status	Workflow Status	Date	Start date
CT-479	NDA for ABC	Non-disclosure Agreement		Active	Drafting		
CT-478	Employment Agreement-Micheal	General employment contract	0.00	Active	Filing & Drafting	2024-02-27	2024-02-27
CT-477	Service Agreement	Drafting New agreements	0.00	Active	Under Negotiation	2024-02-26	
CT-476	Purchase agreement for BLP	Purchase Agreement	0.00	Active	Under Negotiation	2024-02-25	
CT-475	Employment Agreement	General employment contract	0.00	Active	Filing & Drafting		
CT-474	Franchise Agreement	Franchise Agreement	0.00	Active	To be Approved		
CT-467	Agreement for BLP	Drafting New agreements	0.00	Active	Filing & Drafting	2024-02-16	
CT-465	Partnership Agreement for BLP	Partnership Agreement	0.00	Active	Filing & Drafting	2024-02-16	
CT-464	Service Agreement for BLP	Service Agreement	0.00	Active	Under Review 1	2024-02-16	
CT-463	Service Agreement for BC	Service Agreement	0.00	Active	Drafting	2024-02-16	

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

Thank you!