

How to Use the Client portal as Collaborator

Objectives

- [Access the portal](#)
- [Collaborate on contracts through the Client Portal](#)

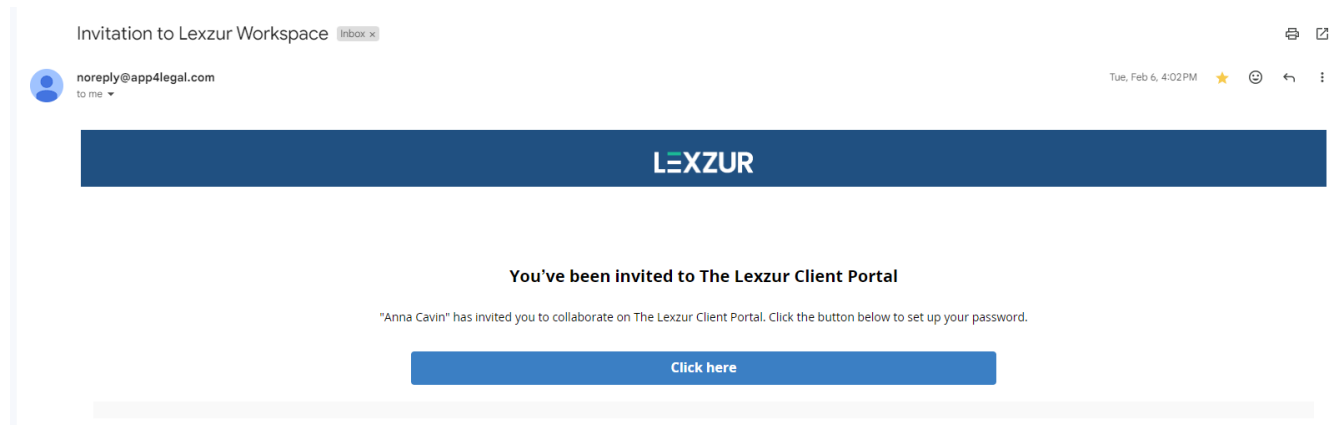
Steps

Contra in Lexzur is a collaborative product, that enables teams to share contracts with external individuals or collaborators who are involved in the contract lifecycle process through the client portal. Collaborators can approve and sign contracts from the portal, but they must possess a collaborator license to access the portal as collaborators.

How to access the Client Portal:

- First, to use the client portal, the admin should add you as a client portal user from the system.
- You will receive an email notification inviting you to join the client portal.

The email will include a link to set up your password. Once you have set up your account, you can log in to the client portal.



Lexzur users can easily share the Client Portal URL with collaborators or embed it on their website, enabling them to access the portal effortlessly.

- Both the Client Portal URL and the link embedded in the email will redirect you to the Client Portal Login Page. Sign in using your credentials to access the portal.

Client Portal
by LEXZUR

Welcome to LEXZUR Client Portal

✉ User Login

🔒 Password

☐ Keep me signed in

Sign In

Or

Sign in using Azure | Sign in using OneLogin

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

Collaborate on Contracts from the Portal:

As a collaborator, you can access the list of contracts that you're involved in, view the contracts that are waiting for your approval and signature, and communicate with all the related parties to this contract.

Navigate to the **Contracts** grid, where all your contracts will be listed.

LEXZUR

Home

Contracts / Agreement

Export to Excel

Request a Contract/Document

Search:

#	ID	Name	Status	Type	Reference#
431	CT431	purchase agreement	Executed	Purchase Agreement	
426	CT426	Non-Disclosure Agreement for Stephan	Drafting	Non-disclosure Agreement	

Signature

Change Password

Help

Out of Office

Stephan luiz

You can search for contracts using quick filters like the ID, name, status, etc. And export the list to Excel for reporting purposes if needed.

#	ID	Name	Status	Type	Reference#
	ID	Name			Reference#
431	CT431	purchase agreement	Executed	Purchase Agreement	
426	CT426	Non-Disclosure Agreement for Stephan	Drafting	Non-disclosure Agreement	

Once the legal team adds you as an approver or signee to this contract, it will appear in the Approval Center and Signature Center respectively.

- Click on the contract ID to open its page (either from the Contracts grid in the portal or from the notification email)
- Review the contract from the **Attachments** tab.
- To approve a contract go to the **Approval Center**, you can start the negotiation, by clicking on the blue icon, this negotiation will be visible to the related users from the contract team.

CT-389 NDA agreement-Business Dept

Export

Details Attachments **Approval Center** Signature Center Milestones

Approval Criteria :

Approval Status : Awaiting Approval

1

Albert Smith Awaiting Approval

Show Summary
Open Contract/Document

1

James Marven , Maria Dave Awaiting Approval

Show Summary
Open Contract/Document

- Click on the green tick to approve or the red cross to reject the contract along with your comments

CT-389 NDA agreement-Business Dept

Details
Attachments
Approval Center
Signature Center
Milestones

Approval Criteria :
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1

Albert Smith Awaiting Approval
Show Summary Open Contract/Document

1

James Marven , Maria Dave Awaiting Approval
Show Summary Open Contract/Document

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Write your comments here...

Start

- To sign a contract go to the **Signature Center**, you can sign the contract either with DocuSign, Adobe Sign, or any digital signature based on the workflow defined by the contract team.

Details
Attachments
Approval Center
Signature Center

Signature Criteria:
Signature Status: Awaiting Signature

1

Alice Jones Awaiting Signature
Show Summary Open Contract/Document

1

Julia Marven Awaiting Signature
Show Summary Open Contract/Document

Sign

Signature History:

By	Action	From	to	On	Signature Label	Comment
Alice Jones	Edit	None	Awaiting Signature	2023-01-26 17:47:41		Signee was edited: Order: From 2 to 1

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

Thank you!