

# How to Manage Matter/Cases Edit from the Advisor Portal

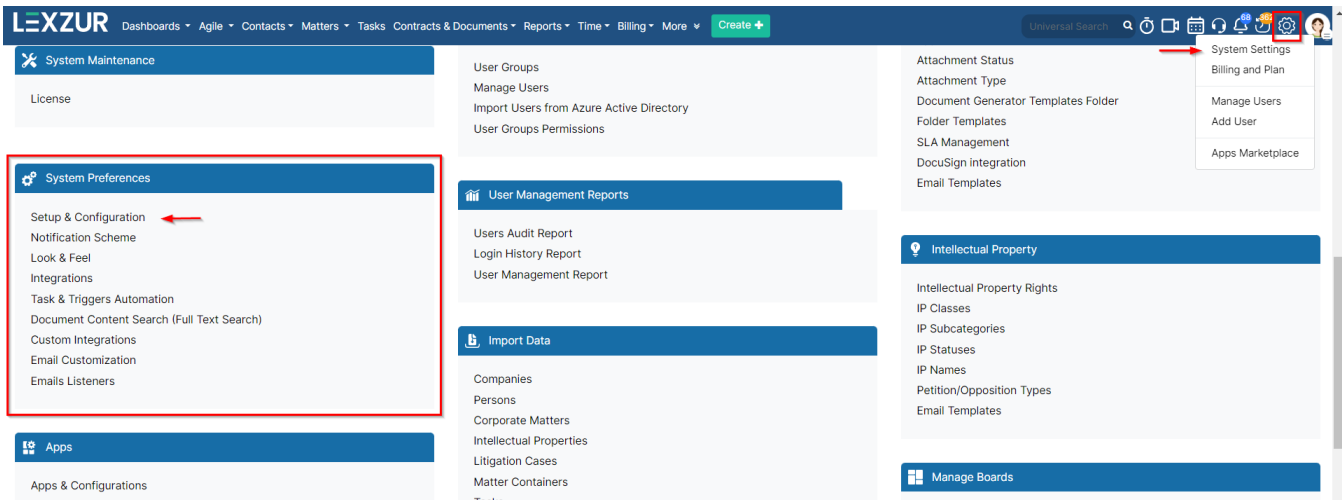
## Objectives:

- Prevent or allow advisors to edit matters from the advisor portal

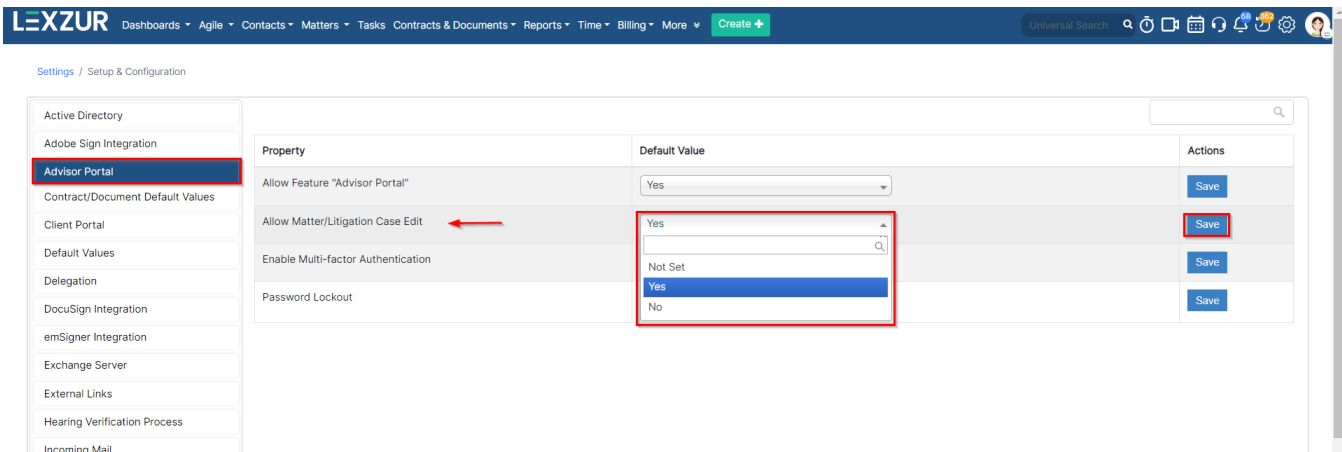
## Steps:

Users now have the ability to manage edits to matters and cases from the Advisor portal. They can effortlessly enable or disable this functionality through the settings.

To access this feature, navigate to **System Settings -> System Preferences -> Setup & Configuration**, and then open the **Advisor Portal** page.



Here, you can allow advisors to edit matters and cases or disable this option under the "Allow Matter/Litigation Case Edit" setting.



Once enabled, advisors will have permission to edit matter details directly from the Advisor portal, including all information on the general info page of both matters and cases.

LEXZUR

Add

Corporate Matters

Litigation Cases

Hearings

Tasks

My Time Logs

Manage Timers

Bills

English

My Profile

Logout

Legal Advice for Advanced Solutions

Consultation

GENERAL INFO

RELATED TASKS

RELATED TIME LOGS

BILLS

RELATED DOCUMENTS

EDIT

ADD NOTE

OPEN

PENDING

CLOSED

MORE

MATTER DASHBOARD

Practice Area:Consultation

Status:In Progress

Internal Ref Number:

Matter Priority:high

Stage:

Success Probability:

Arrival Date:2021-12-01

Filed On:2021-12-02

Due Date:2022-01-09

Closed On:

Client Name:Advanced Solutions

Total Spent Hrs:3.00

MATTER DETAILS

Name:Legal Advice for Advanced Solutions

Value:0.00

Outsourced To:Carl Markle

Description:

Important Development: [2021-12-02 10:30:15]: Matter is now in progress [2021-12-09 10:50:09]: Legal Docs reviewed and translated

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

Thank you!