How to Share Matters with the Client Portal

Objectives

- Share Matters / Cases with Clients
- Share Attachments with the Client Portal

Steps

• Share Matters or Cases with the Clients

To share matters or cases with your clients via the client portal. Open the matter you wish to send, from the main application.

Then from the matter's page click on the Actions button on the top right and choose "Show Matter in Client Portal"

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External Advisor Related Contributors	🔤 General Info					📽 People	Convert To Litigation Show Matter in Clier	n nt Portal
Notes	Name *	Branding Company Registration	Practice Area * 🖶	Other	•	Assigned	Archive Delete	
History	Workflow Status	Open	Workflow used	System Workflow (default)		Assignee	Alice Jones	*
Reminders	Internal Ref Number		Matter Container	Start typing	С,	Referred By	Start typing	٩,
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Identify the Requester, who is the client portal user asking for this matter. Additionally, you have the option to share this matter with Watchers, who are other client portal users you wish to grant access to view it from their perspective.

Requested By* Stephan luiz Start typing to select from possible matches. Watchers	Q,
Stephan luiz Start typing to select from possible matches. Watchers	Q,
Start typing to select from possible matches. Watchers	
	Q,
Start typing to select from possible matches.	
Save Ca	ncel

To share matters with Watchers, they must be listed under the same company as the requester. Otherwise, sharing data with any client portal user is not feasible. You can manage this via the client portal settings. Navigate to **Settings** -> **Client Portal** -> **Manage Clients**.

Here, you can edit client information and add the company name for each client. Client portal users who belong to the same company can then view each other's requests if needed.

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Clients	Search			L.				Advan	ced Search Actions •
	 First Name . 	✓ Last Name	✓ Username	Y Email	Туре	 ✓ Status 	 Related Person 	 User Directory 	Company
•	Adam	Christopher	Adam	ademchristopherr@gmail.com	Both	active	Adam Christopher	Local Directory	IT Department
•	Albert	Smith	Albert Smith	albertsm052@gmail.com	Collaborator	active	Albert smith	Local Directory	Global Tech; HR Department
•	Carol	Mourawed	СМ	caroline.moraod@app4legal	Both	active		Local Directory	Branding Company
•	Elise	Khoury	elise.khoury@app4legal.com	elise.khoury@app4legal.com	Both	active	Elise Khoury	Local Directory	Branding Company; Astra Digital Holdin
•	Jana	Jana	Hamshou	jana.hamshou@app4legal.com	Collaborator	active	Jana Jana	Local Directory	
•	Jimmy	Jones	jimmy	omranhariri29@gmail.com	Client	active	Jimmy Jones	Local Directory	HR Department
	Julia	Marven	Julia	marvenjulia@gmail.com	Client	active	Julia Marven	Local Directory	HR Department
•	Mariana	QZ	MQZ	manal.zeidan@lexzur.com	Both	active	Mariana QZ	Local Directory	abc
•	Micheal	Cavin	MichealCav	michealcavin30@gmail.com	Collaborator	active	Micheal Cavin	Local Directory	Branding Company; HR Department
۲	Rim	Smith	Reem	RimSmith@gmail.com	Client	active	Rim Smith	Local Directory	Branding Company
•	Sam	Robinson	MSA	soheir.zarzour@gmail.com	Both	active	Sam Abed	Local Directory	abc
•	Sara	Malbeck	SaraM	saramalbeck1@gmail.com	Client	active	Sara Malbeck	Local Directory	Global Tech

The client and the watcher (if added) will receive an email that a new matter is shared with them and they can now access the matter from the requested matters page from the Client Portal.

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	M00000463	Commercial		Legal Consultation	2024-04-09	BLP industry	In Progress		All Teams	
	M00000461	Corporate	Jimmy Peterson	MOI	2024-04-05	PT Indasio	2-In Progress		Corporate Team	[20
	M00000454	Corporate	Carolina Robinson	Agency Grid X ABC Company	2024-04-03	Peter Insurance Company	Review	Alice Jones	All Teams	
-	M00000453	Civil	Carolina Robinson	Administrative Consultation for Julia Marven 🔒	2024-04-03		In Progress	Julia Marven	Corporate Team	
	M00000449	Construction, Contracting	Carolina Robinson	Review Contract for SPS	2024-03-27	SPS	Pending		All Teams	[20

• Share Files/Folders with the Clients

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Additionally, users can share the related attachments with their clients in the client portal.

Therefore, from the Attachments tab of Matters, select the File/Folder and click "Show in Client Portal"

M00000135 Consultation f Matter - Corporate Matter	or Competition law 👳			
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i Tasks				
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Emails New	App4Legal Documents OneDrive UR	Ľs		
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Contracts & Documents	Doc120211130161100	.docx		19.6 kB 2023-01-04 18:42 Caroline
📮 Settings				

Mhen a Matter/Contract is visible from the client portal, attachments are not automatically shown.

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

Thank you!