

How to Share Matters with the Client Portal

Objectives

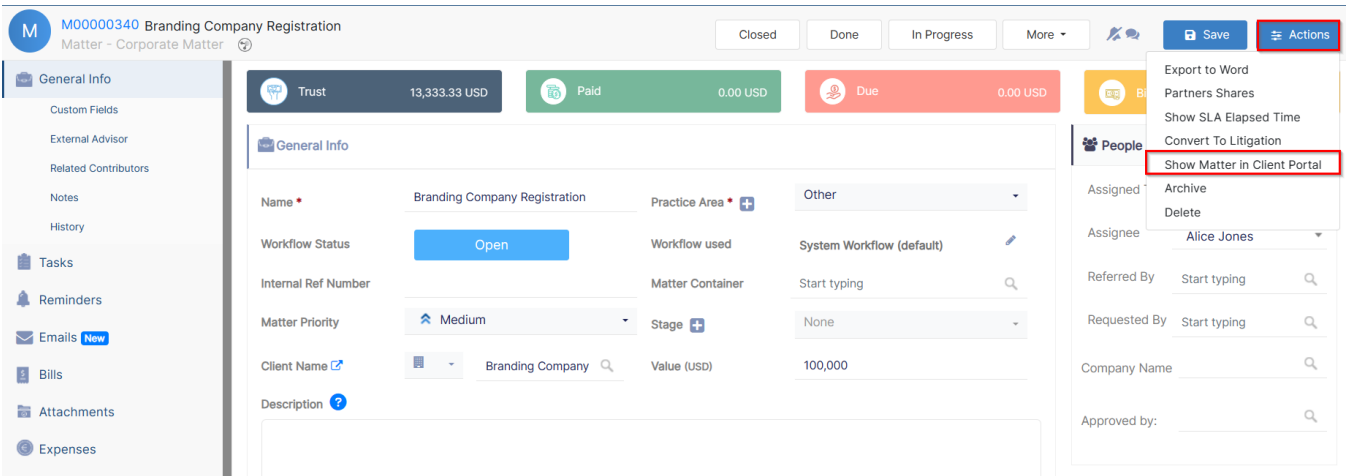
- Share Matters / Cases with Clients
- Share Attachments with the Client Portal

Steps

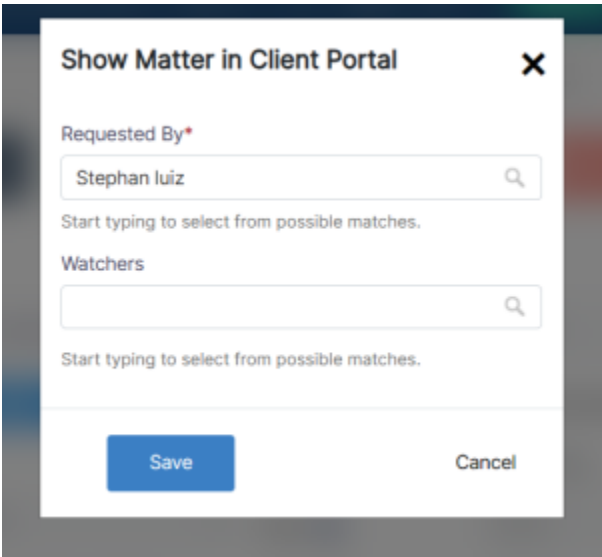
- Share Matters or Cases with the Clients

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"**



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.





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.

First Name	Last Name	Username	Email	Type	Status	Related Person	User Directory	Company
Adam	Christopher	Adam	ademchristophen@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	CM	caroline.morad@app4legal.com	Both	active		Local Directory	Branding Company
Elise	Khoury	elise.khoury@app4legal.com	elise.khoury@app4legal.com	Both	active	Elise Khoury	Local Directory	Astra Digital Holdin
Jana	Jana	Hamshou	jana.hamshou@app4legal.com	Collaborator	active	Jana Jana	Local Directory	
Jimmy	Jones	jimmy	omranhanir29@gmail.com	Client	active	Jimmy Jones	Local Directory	HR Department
Julia	Marven	marvenjulia@gmail.com	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
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.



The green line next to a matter or case name means that it is visible from the client portal.

ID	Practice Area	Assignee	Name	Arrival Date	Client Name	Workflow Status	Requested by	Assigned Team
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
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

• Share Files/Folders with the Clients

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"

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M00000135 Consultation for Competition law

Matter - Corporate Matter

General Info

Tasks

Reminders

Emails New

Related Advisor Tasks

Bills

Attachments

Expenses

Time Entries

Matters

Contracts & Documents

Settings

Trust0.00 USD

Paid0.00 USD

Due0.00 USD

Billable

>Archived Hard Copies

App4Legal DocumentsOneDriveURL's

Download

Rename

Move

Copy Link

Share with

Hide from Advisor Portal

Show in Client Portal

Delete

M135

	Name	Type	Status	Keywords	File Size	Added On	Added By
	Email Attachments				-	2023-01-05 07:5...	Caroline
<input checked="" type="checkbox"/>	Matter_Notes_Attachments				-	2023-01-10 12:...	Katrina
	Doc120211130161100.docx				19.6 kB	2023-01-04 18:42...	Caroline



When 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!