

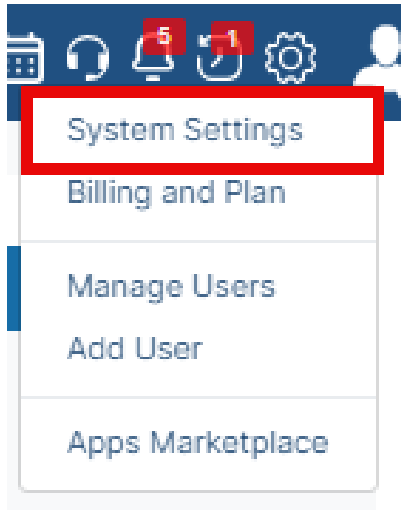
# How to Customize the Client Portal

## Objectives

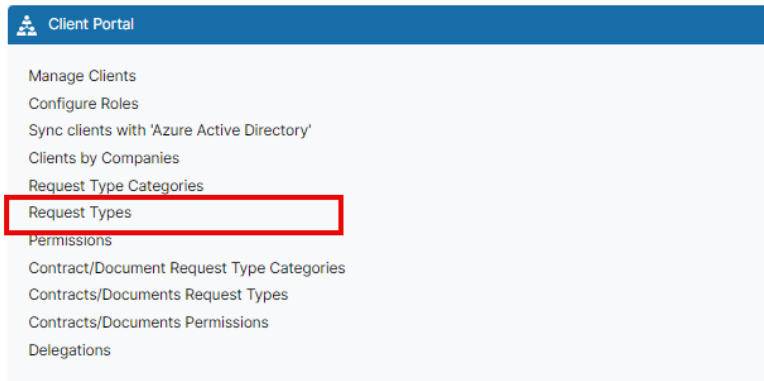
- Customize the Client Portal

## Steps

In LEXZUR, you can customize the Client Portal from the settings page. Go to the Settings icon next to the user avatar in the main menu on the top right of the screen, and choose **System Settings**.



Scroll to the **Client Portal** section, and click on the "Request Types" to add and manage the request types.



You can add request type by simply clicking on the "Add request type" hyperlink.

**There are 3 required fields:**

1. Name: The title of the request type. For example: Legal consultation.
2. Applicable on: It can be a corporate matter or a litigation case.
3. Practice Area: Choose the practice area

## Request Type

Name *	<input type="text" value="Name"/>	Applicable on *	<input type="button" value="Choose Matter Category"/>	Practice Area *	<input type="button" value="Choose Practice Area"/>
--------	-----------------------------------	-----------------	---	-----------------	---

Description

Add Field

Field	Display Name	Required	Visible	Default Value	Description	Actions
Name	<input type="text" value="Name"/>	Yes	<input type="button" value="Yes"/>		<input type="text" value="short hint on the field"/>	<input type="button" value="⬆"/>
Priority	<input type="text" value="Priority"/>	Yes	<input type="button" value="Yes"/>		<input type="text" value="short hint on the field"/>	<input type="button" value="⬆"/>
Assigned Team	<input type="text" value="Assigned Team"/>	Yes	<input type="button" value="Yes"/>		<input type="text" value="short hint on the field"/>	<input type="button" value="⬆"/>

nrcb

## Other fields are optional :

Description: It is a short hint that describes the request type and when it should be used.

Add field: You can select the field that should be added to the request type form.

You can select the display name if it is required or not, if it is visible or not, and also add a description.

From the notification tab, you can select the user to be notified when creating a new request. It can be an LEXZUR user or an external email.

Notifications

Send notification by email when creating a new request

Notify (To)

Notify (CC)

Moreover, you can change the default values in the Client Portal from the "Setup & configuration" under the System preference section Client Portal tab

Active Directory	Homepage Welcome Message	<input type="text" value="Welcome to LEXZUR Client F"/>	<input type="button" value="Save"/>
Adobe Sign Integration	Matter Containers Page name	<input type="text" value="Matter Containers"/>	<input type="button" value="Save"/>
Advisor Portal	Contract/Document Creation Page name	<input type="text"/>	<input type="button" value="Save"/>
Contract/Document Default Values	Contract/Document Page name	<input type="text" value="Contracts / Agreement"/>	<input type="button" value="Save"/>
Client Portal	Homepage Welcome Prompt	<input type="text" value="Submit a new request by click"/>	<input type="button" value="Save"/>
Default Values	New Sign Ups Accepted Domains	<input type="text"/>	<input type="button" value="Save"/>
Delegation	New Sign Ups Approval Type	<input type="button" value="Approved by User"/>	<input type="button" value="Save"/>
DocuSign Integration	New Sign Ups Approval User	<input type="button" value="Carolina Robinson"/>	<input type="button" value="Save"/>
emSigner Integration	Enable Approval & Signature History	<input type="button" value="No"/>	<input type="button" value="Save"/>
External Links	Show Matter Container	<input type="button" value="No"/>	<input type="button" value="Save"/>
Hearing Verification Process			
Document Content Search			
Maker Checker Control			
Menu External Links			
Notifications			
Outgoing Mail			
Password Policy			
Reminders			
Sayen Integration			
System Values			
UAE Pass Integration			
Web Hooks			

You can change the organization name, the welcome message, the ticket page name, and so on.

You can also change the Client Portal Login Logo, the client portal logo, and from the "Look & Feel" under the system preferences section.

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

Thank you!