How to Manage Client Portal Users

Objectives

- Add Client Portal Users
- Manage Clients

Steps

Clients are client portal users, requesters, or collaborators who are allowed to communicate with the legal team through the portal.

The Requests that are sent through the Client Portal are injected as Matters/Cases/Contracts/Documents in LEXZUR.

In LEXZUR, administrators can add and manage the client portal users from within the system. To do so, navigate to the **System Settings** from the Settings icon in the top right of the navigation menu, then scroll to the **Client Portal** section where you can manage all its related settings.

From the "Manage Clients" you can add and manage the client portal users.

			System Settings
Outlook Configuration	Manage Advisors		Billing and Plan
Setup	Workflow Permissions Manage Email Templates	Matter Attachment Classifications Matter Attachment Types Matter Attachment Statuses	Manage Users Add User
	Manage Workflows	Matter Attachment Statuses Matter Container Attachment Types Matter Container Attachment Statuses	Apps Marketplac
Client Portal		iDocs Attachment Types	
anage Clients		iDocs Attachment Statuses Company Attachment Types	
ync clients with 'Azure Active Directory'		Company Attachment Statuses Person Attachment Types	
lients by Companies equest Type Categories		Person Attachment Statuses Document Generator Templates Folder	
equest Types ermissions		Hearing Report Generator Templates Fold Matter Folder Templates	ler
ontract/Document Request Type Categories ontracts/Documents Request Types			
ontracts/Documents Permissions		🚉 Teams	
elegations		Assigned Teams	
		Seniority level	
		Delegations	

The client can either be added via the Actions button or via the Add Client link at the top of the page.

Settings / Client Po	rtal - Manage	Clients Add Client										
	The number of licenses purchased for "Colluborators" is (10) and the number of licenses used is (10)											
	JRL for Clients: https://site.app4legal.com/7691/modules/customer-portal/ Copy UR.											
URL for clients u	sing Azure	Active Directory h	ttps://site.app4legal.c	com/7691/modules/customer-pc	ortal/users/login_id	ps/azure_ad Copy URL						
Clients		Search			Q,							Advanced Search Actions -
												Add Client
	 First Nam 	e 🗸 Last Name	 Username 	~ Email	~ Туре	 ✓ Status 	Related Person	 User Directory 	~ Company	 Position 	~ Phone	Import Clients from "Azure AD"
۲	Simona	Shashaa	Simona	simona.shashaa@pxgeo.com	Client	inactive	Simona Shashaa	Local Directory				Export to Excel
•	Jimmy	Jones	jimmy	omranhariri29@gmail.com	Client	active	Jimmy Jones	Local Directory				No
•	Manal	Zeidan	manalz	manal.zeidan@lexzur.com	Both	active	Manal Zeidan	Local Directory				No
•	Stephan	luiz	stephan	omran.hariri@app4legal.com	Both	active	Stephan Luiz	Local Directory				No
۲	Tima	Andrew	Tima	TimaA@gmail.com	Collaborator	inactive	test testing	Local Directory				Yes
•	Sam	Abed	53	soheir.zarzour@gmail.com	Both	active	Sam Abed	Local Directory				No
۲	Jana	Jana	Hamshou	jana.hamshou@app4legal.com	Collaborator	inactive	Jana Jana	Local Directory				Yes
•	Sara	Malbeck	SaraM	saramalbeck1@gmail.com	Client	active	Sara Malbeck	Local Directory	Global Tech			No
۲	Alvah	Scott	Alvah Scott	AlvahScott@outlook.com	Client	inactive	Alvah Scott	Local Directory				No
۲	jm	bətz	jimbatz@gmail.com	jimbatz@gmail.com	Both	inactive	Jim Batz	Local Directory				Yes
•	Adam	Christopher	Adam	ademchristopherr@gmail.com	Both	active	Adam Christopher	Local Directory	IT Department	IT Expert		No
•	Micheal	Cavin	MichealCav	michealcavin30@gmail.com	Both	active	Micheal Cavin	Local Directory	Branding Company; HR Department			No
۲	Peter	Young	PeterYoung	petryoungg@gmail.com	Both	inactive	Peter Young	Local Directory	Global Tech			Yes

To add a new Client you must fill out some mandatory fields such as First Name, Last Name, Username, and Email, and specify the Access type such as client, collaborator, or both.

You can also determine more fields such as the related company, job title, mobile, address, and manager.

⚠

Fields like the manager, job title, and company provide valuable information for various purposes, such as role definition and assigning watchers.

Add Client		×
First Name:*		
Jimmy		
Last Name:*		
Peterson		
Username:*		
Jimmy.P		
Email:*		
jimmy.peterson@hotmail.com		
Туре:*		
Client	Collaborator	
More Fields		>

Save

⚠

Cancel

More Fields	~
Company:	
	~
Job Title:	
Employee ID:	
Phone:	
Mobile:	
Department:	
Address:	
Manager:	
	~
Save	Cancel

After adding the client portal users, they will receive an email notification inviting them to join the client portal.

Invitation to Lexzur Workspace Intervention				8	ß
noreply@app4legal.com to me ▼	Tue, Feb 6, 4:02 PM (1 day ago)	☆	© ·	←	:
LEXZUR					
You've been invited to The Lexzur Client Portal					
"Anna Cavin" has invited you to collaborate on The Lexzur Client Portal. Click the button below to set up your password.					
Click here					

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

	Password:*	
	Password Confirmation:*	gill.
F	submit	

Depending on their access type, they can request matters/contracts or collaborate on contracts.

It's important to note that users remain deactivated until they open the link and set their passwords. Admins also have the option to resend the email to users who haven't set up their accounts yet.

The list of clients can be then viewed with their details. The green dot indicates that the client is active. Simply click on the green dot to Activate/Deactivate Clients

)1/modules/customer-p tps://site.app4legal.co		/ Copy URL 91/modules/customer-po	rtal/users/login_	_idps/azur	e_ad Copy U	RL			
Clients		Search		٩							Advance	d Search	Actions -
	~	First Name	✓ Last Name	V Username	~	Email	туре		✓ Status		 Related Person 	~	User Directo
	•	Stephan	luiz	stephan		omran.hariri@app4legal.com	Client		active		Stephan luiz		Local Direct
	0	Tima	Andrew	Tima		TimaA@gmaill.com	Collaborator		inactive		test testing		Local Direct
	•	Sam	Abed	sa		soheir.zarzour@gmail.com	Both		active		Sam Abed		Local Direct
	0	Jana	Jana	Hamshou		jana.hamshou@app4legal.com	Collaborator		inactive		Jana Jana		Local Direct
		Sara	Malbeck	SaraM		saramalbeck1@gmail.com	Both		active		Sara Malbeck		Local Direct
	0	Alvah	Scott	Alvah Scott		AlvahScott@outlook.com	Client		inactive		Alvah Scott		Local Direct
	0	jim	batz	jimbatz@gmail.com		jimbatz@gmail.com	Both		inactive		Jim Batz		Local Direc
	•	Adam	Christopher	Adam		ademchristopherr@gmail.com	Both		active		Adam Christopher		Local Direc

Also, next to each client name, there is an action wheel to activate, deactivate, ban, and so on.

Settings / Client Portal - Manage Clients / Add Client

URL for Clients: https://site.app4legal.com/7691/modules/customer-portal/ Copy URL

Clients	Search		Q,					Advanced Search Actions -
~	First Name	✓ Last Name	✓ Username	- Email -	Туре	✓ Status	✓ User Directory	✓ Company
•	Adam	Christopher	Adam	ademchristopherr@gmail.com	Client	active	Local Directory	IT Department
۰	Micheal	Cavin	MichealCav	michealcavin30@gmail.com	Collaborator	active	Local Directory	Branding Company
Ban / Unban Flag to Change Pa	coword	Young	PeterYoung	petryoungg@gmail.com	Both	active	Local Directory	Global Tech
Activate / Deactiva		Zarzour	Soheir zarzour	soheir.zarzour@app4legal.com	Both	active	Local Directory	BLP industry
	Recili	Salem	Reem	Reemsalem@gmail.com	Client	inactive	Local Directory	
•	Ziad	Abdullah	Ziad	ZiadAbdullah@gmail.com	Client	active	Local Directory	Branding Company
•	Julia	Marven	Julia	marvenjulia@gmail.com	Both	active	Local Directory	HR Department
\bigcirc	Vivian	Robinson	Vivian	VivianRobin@gmail.com	Collaborator	inactive	Local Directory	Business Department
•	Elise	Khoury	elise.khoury@app4legal.com	elise.khoury@app4legal.com	Both	active	Local Directory	Branding Company; Astra Digital Holding
•	يسمة	مراد	يسمة	mradbasma46@gmail.com	Client	active	Local Directory	
•	Alice	Jones	Alice Jones	JonesAAlice21@gmail.com	Collaborator	active	Local Directory	HR Departm.

The URL for Clients can either be shared via email or embedded on your company's website.

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

Thank you!