How to Manage Client Portal Users

Objectives

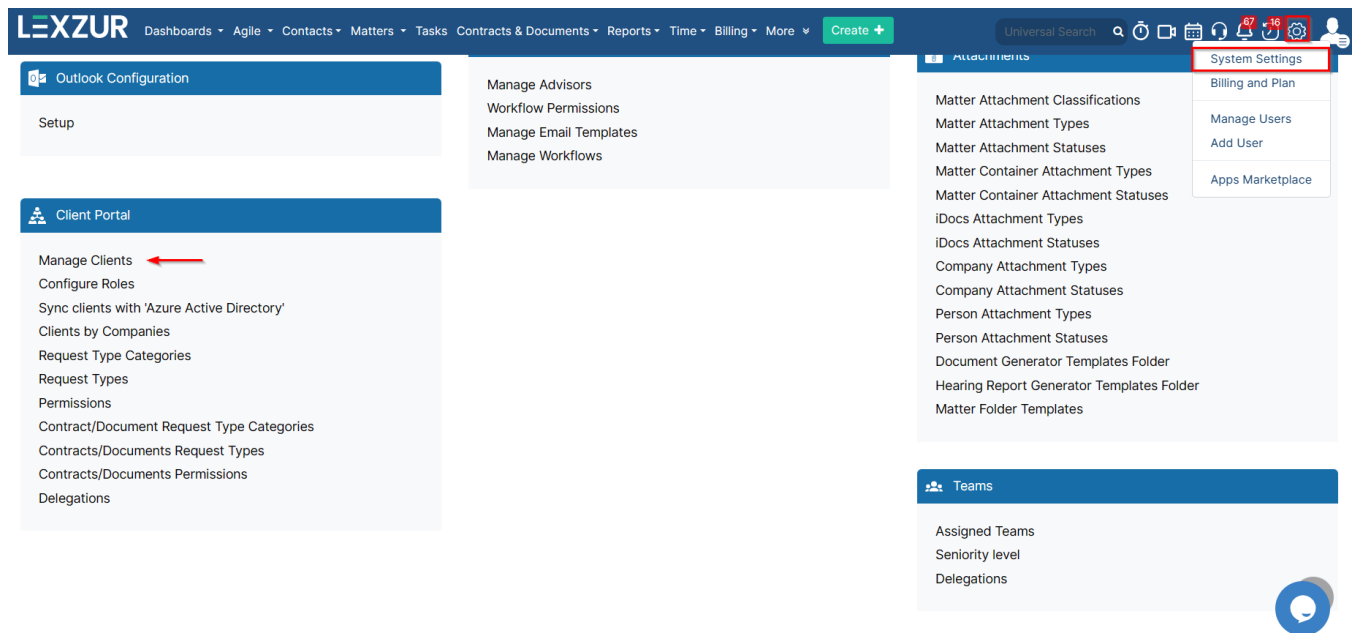- Add Client Portal Users
- Manage Clients

Steps

Clients are client portal users, requesters, or collaborators who are allowed to communicate with the legal team through the portal.
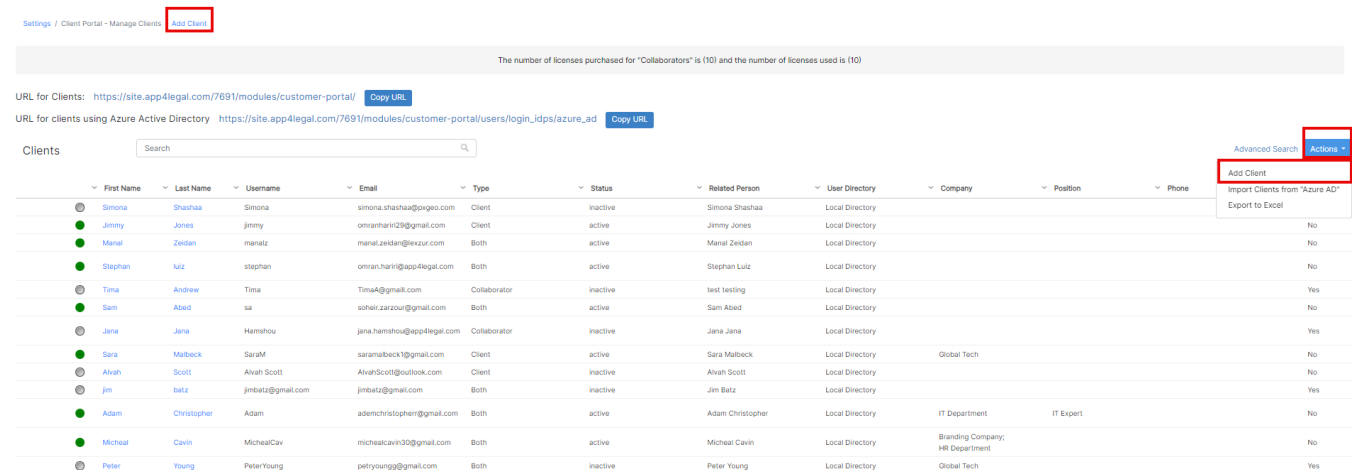
The Requests that are sent through the Client Portal are injected as Matters/Cases/Contracts/Documents in LEXZUR.

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.

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

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

Type:*

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.

noreply@app4legal.com
to me ▾
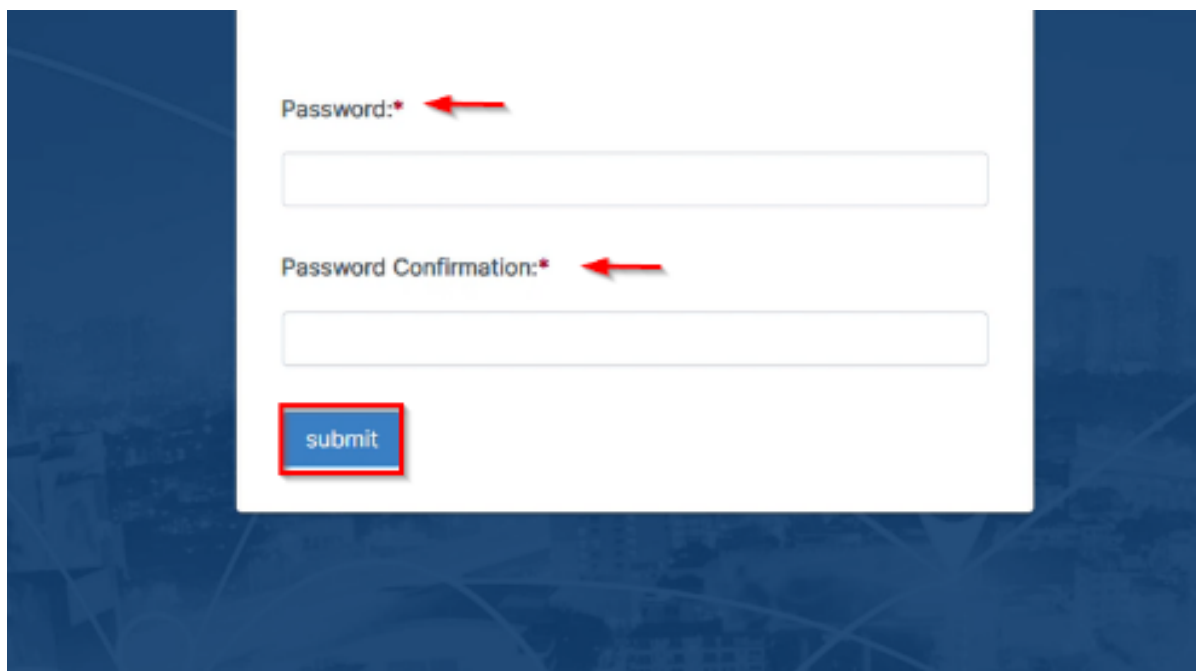
Tue, Feb 6, 4:02 PM (1 day ago)

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:*

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

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

URL for clients using Azure Active Directory https://site.app4legal.com/7691/modules/customer-portal/users/login_idps/azure_ad [Copy URL]

Clients [Search]   Advanced Search [Actions ▾]

	First Name	Last Name	Username	Email	Type	Status	Related Person	User Directory
🟢	Stephan	luiz	stephan	omran.hariri@app4legal.com	Client	active	Stephan luiz	Local Directory
⚪	Tima	Andrew	Tima	TimaA@gmaill.com	Collaborator	inactive	test testing	Local Directory
🟢	Sam	Abed	sa	soheir.zarzour@gmail.com	Both	active	Sam Abed	Local Directory
⚪	Jana	Jana	Hamshou	jana.hamshou@app4legal.com	Collaborator	inactive	Jana Jana	Local Directory
🟢	Sara	Malbeck	SaraM	saramalbeck1@gmail.com	Both	active	Sara Malbeck	Local Directory
⚪	Alvah	Scott	Alvah Scott	AlvahScott@outlook.com	Client	inactive	Alvah Scott	Local Directory
⚪	jim	batz	jimbatz@gmail.com	jimbatz@gmail.com	Both	inactive	Jim Batz	Local Directory
🟢	Adam	Christopher	Adam	ademchristopherr@gmail.com	Both	active	Adam Christopher	Local Directory

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]   Advanced Search [Actions ▾]

		First Name	Last Name	Username	Email	Type	Status	User Directory	Company
	🟢	Adam	Christopher	Adam	ademchristopherr@gmail.com	Client	active	Local Directory	IT Department
⚙	🟢	Micheal	Cavin	MichealCav	michealcavin30@gmail.com	Collaborator	active	Local Directory	Branding Company
		Young	PeterYoung	petryoungg@gmail.com	Both	active	Local Directory	Global Tech	
		Zarzour	Soheir zarzour	soheir.zarzour@app4legal.com	Both	active	Local Directory	BLP industry	
		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
	⚪	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
	🟢	بسمة	مراد	بسمة	mradbasma46@gmail.com	Client	active	Local Directory	
	🟢	Alice	Jones	Alice Jones	JonesAAlice21@gmail.com	Collaborator	active	Local Directory	HR Department

Ban / Unban
Flag to Change Password
Activate / Deactivate

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!