

How to Manage the Advisor Portal

Objectives

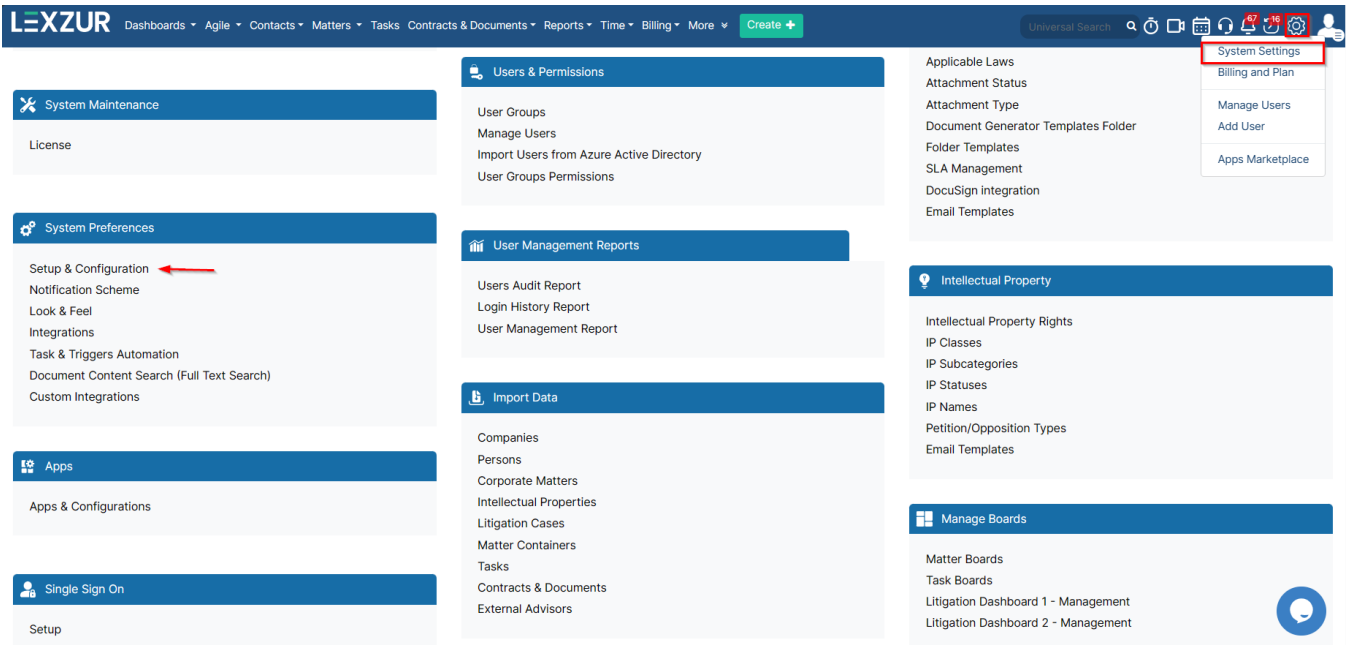
- [Enable the Advisor Portal](#)
- [Add Advisors](#)
- [Configure the Advisor Portal](#)

Steps

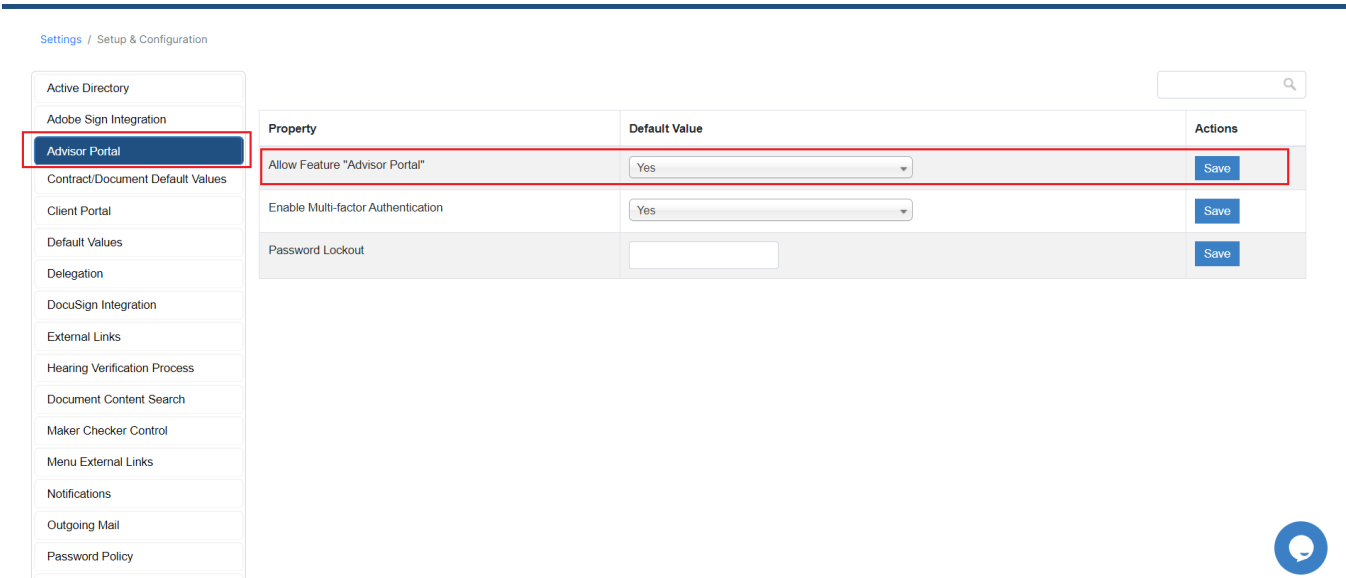
The advisor portal adds a layer of functionality to the core application that allows external advisors to be on a unified platform, eliminating duplicate processes and improving data-sharing efficiency.

How to Enable it:

First of all, in order to enable and configure the Advisor Portal you must go to the **System Settings Setup & Configuration**



Then from the **Advisor Portal** tab, Enable the feature.



You can also Enable here the **Multi-Factor Authentication**.

Settings / Setup & Configuration

Active Directory

Adobe Sign Integration

Advisor Portal

Contract/Document Default Values

Client Portal

Default Values

Delegation

DocuSign Integration

External Links

Hearing Verification Process

Document Content Search

Maker Checker Control

Menu External Links

Notifications

Outgoing Mail

Password Policy

Property	Default Value	Actions
Allow Feature "Advisor Portal"	Yes	Save
Enable Multi-factor Authentication	Yes	Save
Password Lockout		Save

Add Advisors:

Adding and managing the Advisor Portal could be done from the Advisor Portal section in the System Settings.

LEXZUR

Dashboards ▾ Agile ▾ Contacts ▾ Matters ▾ Tasks ▾ Contracts & Documents ▾ Reports ▾ Time ▾ Billing ▾ More ▾ Create +

Universal Search 🔍 📅 📞 📧 10 ⚙️ 👤

Single Sign On

Setup

Outlook Configuration

Setup

Client Portal

Manage Clients

Configure Roles

Sync clients with 'Azure Active Directory'

Clients by Companies

Request Type Categories

Request Types

Permissions

Contract/Document Request Type Categories

Contracts/Documents Request Types

Contracts/Documents Permissions

Delegations

Litigation Cases

Matter Containers

Tasks

Contracts & Documents

External Advisors

Advisor Portal

Manage Advisors

Workflow Permissions

Manage Email Templates

Manage Workflows

manage boards

Matter Boards

Task Boards

Litigation Dashboard 1 - Management

Litigation Dashboard 2 - Management

System Settings

Billing and Plan

Manage Users

Add User

Apps Marketplace

Attachments

Matter Attachment Classifications

Matter Attachment Types

Matter Attachment Statuses

Matter Container Attachment Types

Matter Container Attachment Statuses

iDocs Attachment Types

iDocs Attachment Statuses

Company Attachment Types

Company Attachment Statuses

Person Attachment Types

Person Attachment Statuses

Document Generator Templates Folder

Hearing Report Generator Templates Folder

Matter Folder Templates

Teams

The **Manage Advisors** is where you can add and manage your advisors.

This page shows the list of active advisors with their details. The green dot indicates that the advisor is active.

The number of licenses purchased for "Advisor Portal" is (10) and the number of licenses used is (10)

URL for Advisor <https://advisor.app4legal.com/7691>

Advisors

Search



Advanced Search

Actions

Add Advisor

	First Name	Last Name	Email	Status	Company	Supplier Na...	Position	Phone	Mobile	Banne
	Soheir	Zarzour	soheir.zarzour@app4legal.com	active	BLP Industry	BLP Industry				No
	Anna	Peterson	annabillapeterson@gmail.com	active	Common Law	Common Law	Legal Expert			No
	Sam	Farmer	caroline.moroad@app4leg...	active	Brandy Translation	Brandy Translation	Translator			No
	Jim	Batz	jimbatz72@gmail.com	active	BLP Industry	BLP Industry				Yes
	Peter	Young	petryoung@gmail.com	active	Peter Legal	Peter Legal	Legal expert			No
	Mohamed	Mustafa	mohamed.mustafa@app4leg...	active	Mustafa Co	Mustafa Co				No
	Elise	Khoury	elise.khoury@app4legal.com	active	BLP Industry	BLP Industry				No

You can use the advanced search to search for a specific advisor.

The advisor can either be added via the **Actions** button or via the **Add Advisor** hyperlink at the top of the page.

Add Advisor

Related Person

Try to lookup for a person to copy his information into the advisor.

Related Company*

An Advisor can belong to only one company.

First Name*

Last Name*

Email*

Phone

Mobile

Job Title

Address

☐ Receive bill notifications

Save

Cancel

Advisors could be related to persons defined previously, therefore, you can simply specify the person's name, and automatically all the related data will be retrieved. Otherwise, fill out the necessary Advisor details such as the Name, Email, and Related Company.

Once you enter the details and press save, the advisor will receive an email with the URL of the advisor portal and the login credentials.

Additionally, there is an option to Ban/Unban or ask the advisor to change their password from the action wheel next to each record.

The number of licenses purchased for "Advisor Portal" is (10) and the number of licenses used is (9)


URL for Advisor <https://advisor.app4legal.com/7691>

Advisors

Search

Advanced Search

Actions

	First Name	Last Name	Email	Status	Company	Supplier Na...	Position	Phone	Mobile
	Jim	Batz	jimbatz72@gmail.com	active	BLP industry	BLP industry			
	Young		petryoung@gmail.com	active	Peter Legal	Peter Legal			
	Mohamed	Mustafa	mohamed.mustafa@app4leg...	active	Mustafa Co	Mustafa Co			
	Elise	Khoury	elise.khoury@app4legal.com	active	BLP industry	BLP industry			
	Julia	Marven	marvenjulia@gmail.com	active	HR Department	HR Department	Head of HR		
	Micheal	Cav	michealcavin30@gmail.com	active	Common Law	Common Law			
	Eleanor	Jones	mrawedcaroline2@gmail.com	active	Common Law	Common Law	Legal Expert		
	Carl	Markle	carolinemraved@gmail.com	active	Common Law	Common Law			

Managing Advisor Portal also includes granting permissions to change workflow status and manage the workflow status as well.

Users can also configure the email template that will be sent automatically to advisors once added.

Advisor Registration

Template Content

Edit Insert Format Table

Paragraph

B I

Thanks,

1 words

Hi [advisor_name],

You have been added to [instance_name] system as an Advisor, here are your login credentials:

E-mail: [advisor_email]

Password: [random_password]

[instance_url]

Thanks,

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

Thank you!