

How to Share Client Portal Requests with Watchers

Objectives

- Add Watchers in the Client Portal (who have access to shared items in the portal)

Steps

Watchers are client portal users with whom you can share requests (matters and contracts). This enables them to track and view these requests directly from their client portal account.

To share matter or contract request with watchers, open the request page in the client portal

M00000340 Branding Company Registration

Details Attachments

Status : **Open** Practice Area : **Other**

Priority : **medium** Important Development :

Comments 0

Format - **B** **I** **U**

Attach File Choose file

People

Created By : **Carolina Robinson**

Assigned To : **Alice Jones**

Requested By : **Stephan luiz**

Watchers : **Start typing**

Dates

Requested on : **2023-12-04 18:07**

Last Update : **2023-12-10 14:30**

Under the People section, search for watchers and add them.

CT417 Partnership Agreement Export

Details Attachments Approval Center Signature Center

Status : **Under Negotiation** Priority : **medium**

Reference# : Type : **Partnership Agreement**

Sub type :

Termination Clause : **None** Add a link : **None**

Notice Period : **None**

Parties

Party : **None**

Comments 0

Format - **B** **I** **U**

People

Requested By : **Stephan luiz**

Assigned To : **Carolina Robinson**

Watchers : **Start typing**

Dates

Requested on : **2023-11-28 11:47**

Last Update : **2023-12-10 14:32**

You can search for watchers using either their Name, username, or emails.

