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

7	M00000340 Branding Compa	any Registration		
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	Status : Open	Practice Area : Other	🔹 People	
	Priority : medium	Important Development :	▲ ⁺ Created By :	Carolina Robinson
	Comments 0		Assigned To :	Alice Jones
			Requested By :	Stephan luiz
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	& Attach File Choose		Dates Case Department	2023-12-04 18:07 2023-12-10 14:30

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

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88 ≘	Details Attachments Approval	Center 🥪 Signature Center 🧧		
	Status : Under Negotiation	Priority : medium	😫 People	
	Reference# :	Type : Partnership Agreement	Requested By : Stephan luiz	
	Sub type : Termination Clause : None	Add a link : None	Assigned To: Carolina Robinson Watchers : Start typing	
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You can search for watchers using either their Name, username, or emails.

a new request	Details Attachments Approval Center 🥪 Signa	iture Center 🧑		
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	Type : Non-disclosure Agreement Add a link : https://www.google.com		🚨 Requested By :	Maria Carolina Rol
	Pool Billink - Incpag/ III Ingooglosooni		Watchers :	MSA
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Watchers can therefore access these matters and contracts from their client portal page.

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	Created by oth	her Litigatio	n only	Corporate only			Search	:	
ID Name		Assignee	Status	Practice Area	Category	Priority	Created By	Requested By	Last Update
M00000340 Branding Registrati) Company tion	Alice Jones	Open	Other	Matter	medium	Carolina	Stephan luiz	2023-12-10

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

Thank you!