

How to Set the User Group Permissions

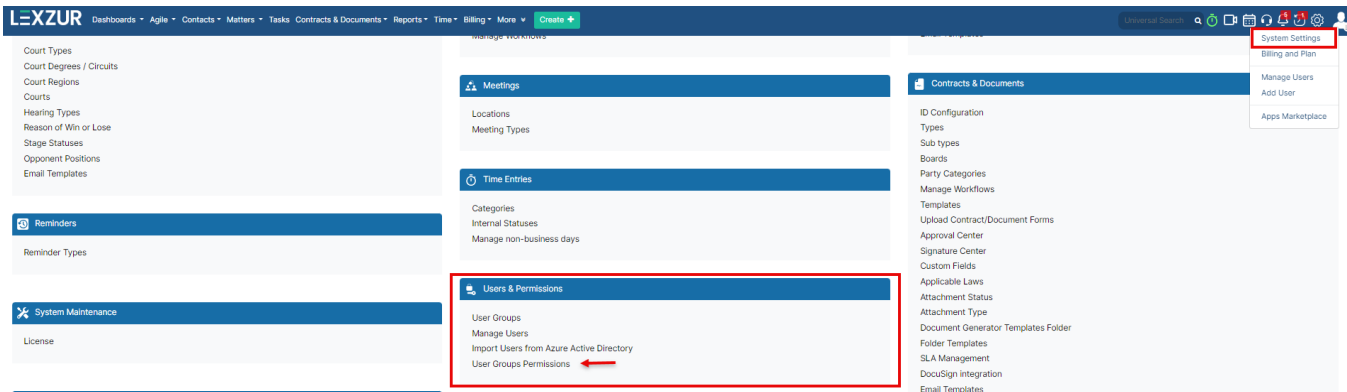
Objectives

- Grant Permissions according to user groups and modules

Steps

Within LEXZUR, you can grant permissions to users according to their groups and the specific module they will be working on.

To configure user permissions, the administrator needs to navigate to the **System Settings**. From the **Users & Permissions** section, select **User Group Permissions**. This allows for the fine-tuning of access and control based on user roles and designated modules.



Select the user group for which you wish to grant specific permissions, such as User, Administrators, or Accountant, and then choose the relevant module, such as Core, Contract, or Billing. This step enables the customization of access and capabilities based on user roles within the specified modules in the system.



Administrators will automatically have all permissions granted by default.

Settings / User Groups Permissions

User Group:

System Administrator

module:

Select Module

Controls:

Settings / User Groups Permissions

User Group:

System Administrator

System Administrator

Administrator

User

Accountant

User read-only

Accountant read-only

IT - Maker

IT- Checker

Legal Executives

associate

Super User 2

Settings / User Groups Permissions

User Group:

User

module:

Lexzur Core

Select Module

Lexzur Core

Contra

Billing

The Controls represent the functionalities associated with each module. For instance, selecting "Lexzur Core" will display all the pertinent core features, allowing you to configure permissions for the chosen user group in each Core setting.

Settings / User Groups Permissions

User Group:

User

module:

Lexzur Core

Controls:

Advisor Portal
Advisor Task Workflows
Apps
Apps Marketplace
Areas of Practice and SLA
Assigned Team
Assignments
Board Member Roles
Calendar
Matter Folder Templates
Client Portal Delegations
Client Portal Managers Roles
Client Portal Request Type Categories
Clients
Companies
Company Asset Types
Company Document Statuses
Company Document Types
Company Legal Types
Company Licenses and Waivers Types
Company Relation Types
Contact / Company Categories
Contact / Company Sub-categories
Person Attachment Statuses
Contact Document Types
Persons
Court Degrees
Court Regions
Court Types
Courts
Custom Fields
Custom Integrations
Dashboard
Delegations
IDocs
IDocs Attachment Statuses
IDocs Document Types
Document Content Search
Document Generator
Email Customization

Permissions Under "Lexzur Core"

Matters

All Permissions Granted

Clients

Save

Companies

Persons

Dashboard

Export

Import Data

Intellectual Properties

Matter

Archive Matters

Unarchive Matters

List Corporate Matters

Related Matters

Reports

Save

The Permissions within this specific module become visible, allowing you to search for and enable the required permissions. They are categorized alphabetically, with sub-permissions accessible by clicking on each module to reveal the related permissions.

For example, within the Matter section, you have permissions related to various matter activities such as adding new matters or cases, archiving matters, adding folders, adding notes, and more.

Once adjustments are complete, simply press Save to apply the configured permissions.

Likewise, if you choose **"Billing,"** you can define permissions associated with accounting functionalities. This includes permissions for Reports, Accounts, Invoices, Discounts, Taxes, and other relevant features within the billing module.

Settings / User Groups Permissions

User Group:

User

module:

Billing

Controls:

Accounts

Analytic Account Template

Analytic Accounts

Bills Approval Center

Clients

Credit Note Reason

Dashboard

Debit Note Reason

Discounts

Entities

Entity Invoice Templates

Expense Categories

Import Entity Settings

Invoice Custom Fields

Invoice Details Format

Invoice Notes

Items

Money Preferences

Partners

Reports

Setup

Supplier Taxes

Suppliers

Taxes

Terms

Time Tracking

Users Rates

Vouchers

Permissions Under "Billing"

Search

Q

Save

All Permissions Granted

Accounts

Add

Quick Add

List Partners Accounts

Export Partners Accounts to Excel

Set Account Number Prefix

Delete

Quick Edit

List Supplier Accounts

Export Suppliers Accounts to Excel

Edit

Show Transactions

Export to Excel

Money Transfer

List

List Client Accounts

Export Clients Accounts to Excel

Add Account in Record Expense

Analytic Account Template

Analytic Accounts

Bills Approval Center

Clients

Credit Note Reason

Dashboard

Within the **"Contra"** permissions, you gain control over all aspects related to contracts. This encompasses the ability to add, edit, delete, or amend a contract, and oversee the signature center, approval center, applicable law, clauses, and various other contract-related functionalities.

Settings / User Groups Permissions

User Group:

User

module:

Contra

Controls:

Adobe Sign Integration

Applicable Laws

Approval Center

Contract Categories

Contract Clauses

Contract Document Generator

Contract Document Statuses

Contract Document Types

Contract Renewals

Contract Request Type Categories

Contract Statuses

Contract Templates

Contract Types

Contracts & Documents

Custom Fields

Dashboard

DocuSign Integration

Esign Providers

Export

Folder Templates

Import Data

Integration with Emdha

Manage Client Portal

Manage Workflows

Party Categories

Reports

Signature Center

SLA Management

Sub Contract Types

Task & Triggers Automation

Permissions Under "Contra"

Search

Q

Save

All Permissions Granted

Adobe Sign Integration

Applicable Laws

Approval Center

Add

Delete

Edit

Delete Criteria/Approver

Clone

List

Contract Categories

Contract Clauses

Contract Document Generator

Contract Document Statuses

Contract Document Types

Contract Renewals

Contract Request Type Categories

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

Thank you!