How to Manage Users and Licenses

Objectives
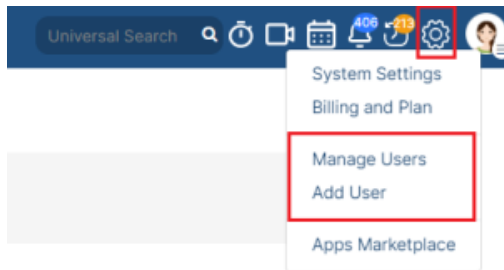
- Add a new user
- Manage users list (Activate/Deactivate/Ban/Override Privacy...)
- Replace the user with another
- Purchase additional licenses

Steps

Users in LEXZUR could be any member that will utilize and collaborate on the system such as the legal team, accountants, administrators, and so on. Each user will have his own credentials so that he can easily log in to the system, but only admins can add, edit, activate, deactivate, and manage everything related to users.

Add New User:

From the settings icon in the navigation menu, you can either add a new user or navigate to the user management page.

> ⓘ You also add a new user by either clicking on the Add User hyperlink or from the Actions button on the right of the User Management page.

When adding a new user, you are required to fill in all the basic information:

Specify the user's **first name, last name,** and **email,** and choose the **user group** to which this user belongs such as administrator, accountant, and so on. Then choose the seniority level such as partner, consultant, or lawyer. And choose the **access type** for this user. A user can use the core solution the contract solution or both.

These details are sufficient for creating a new user, however, you can add more details such as the user's personal information like job title, mobile number, and user's address, but all these fields are optional.

If you click **Save and More Details** you will be directed to the user's detailed page where you can add any additional information.

The system will automatically set the user's unique code which can be used as an Employee ID or a replacement for a user's full name when generating an invoice.

The number of licenses purchased for "Core" is (10) and the number of licenses used is (9)
The number of licenses purchased for "Contra" is (10) and the number of licenses used is (10)

Status Active ▾

Basic Information Personal Information Address Comments

First Name*	Peter	Last Name*	Young
User Code*	UC22 ⬅ ❓	Email*	petryoungg@gmail.com
Password*	••••••••	Confirm Password ⬅	User Group*	User ▾
Access type*	☑ Core ☑ Contra	Seniority level*	Executive ▾ ➕

Save Clone

The number of licenses purchased for "Core" is (10) and the number of licenses used is (9)
The number of licenses purchased for "Contra" is (10) and the number of licenses used is (10)

Status Active ▾

Basic Information **Personal Information Address Comments**

Title	Choose Title ▾	Gender	Choose Gender ▾
Job Title	Job Title		☐ Is Lawyer
Foreign First Name	Foreign First Name	Foreign Last Name	Foreign Last Name
Father	Father	Mother	Mother
Employee ID	Employee ID	Date Of Birth	📅
Teams	Start typing 🔍	Fax	
Phone	Phone	Website	Website
Nationality	None ▾	Mobile	Mobile
Department	Department		

Save Clone

Once added the user will be notified that he has been added to your Workspace. And he can Join directly from the received link, and log in to the system easily.

⬨ App4Legal

Join App4Legal Workspace

Carolina Robinson (caroline.moraod@app4legal.com) has invited you to join App4Legal workspace "app4legal". Join now to start collaborating!

Join Now

Manage Users:

Once the new user is added to the list of Users page, you can view, edit, ban, activate, and deactivate this user at any time, override privacy, and flag to change password which means that the user will be invited to change his password on his next login, revoke the API key and view his permission list.

The number of licenses purchased for "Core" is (10) and the number of licenses used is (9)
The number of licenses purchased for "Contra" is (10) and the number of licenses used is (10)

Need additional licenses? Expand your user base
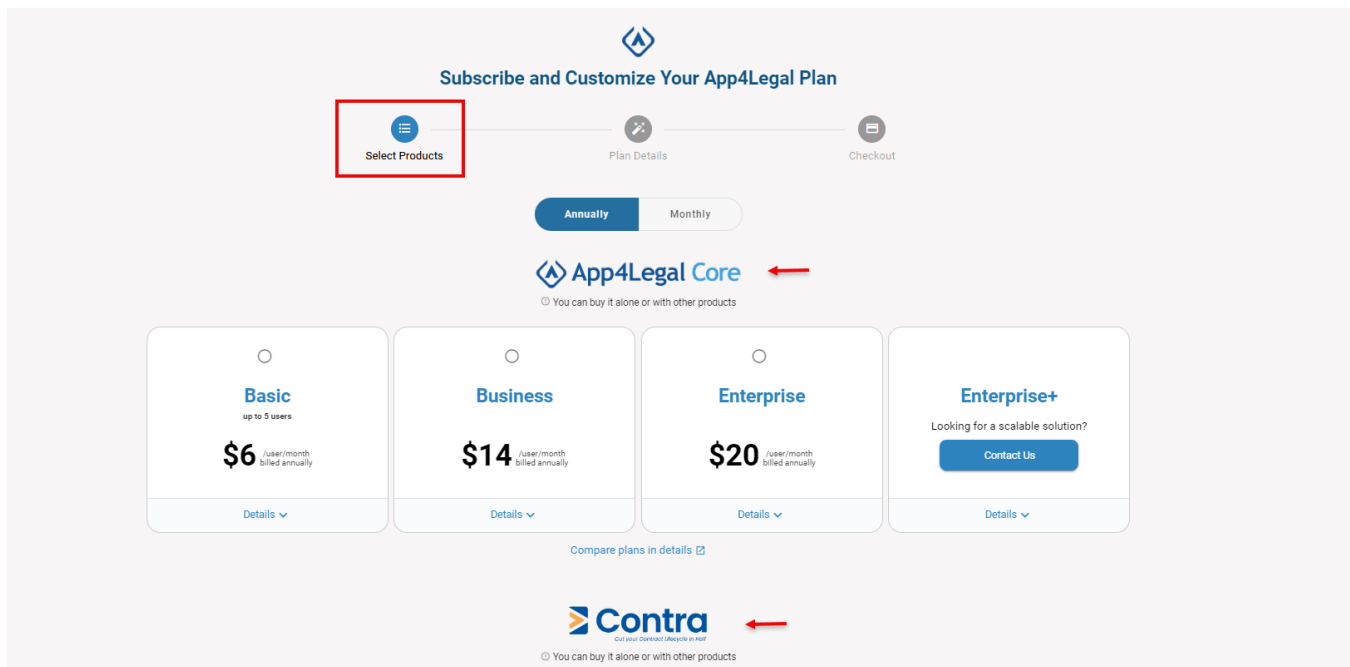
Customer Number : 7691

Users

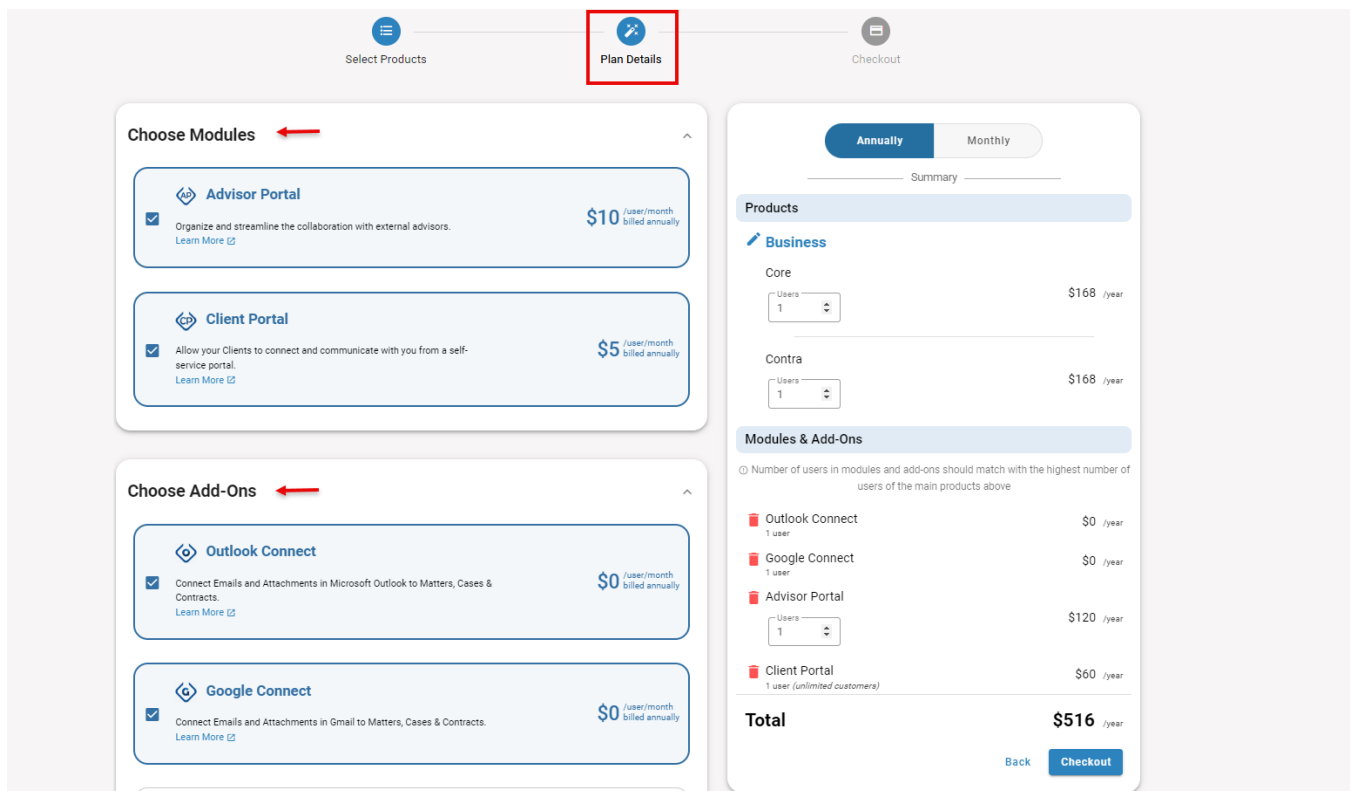| Search												Actions ▼

Advanced Search

ID	First Name	Last Name	Email	User Code	User Group	Status	Type	Seniority level	Teams	Lawyer?	
U22 🔒	Peter	Young	petryoungg@gmail.com	UC22	User	Active	Both	Executive		No	
View / Edit	Jimmy	Peterson	omran.hariri@app4legal.com	UC18	Administrator	Active	Both	Lawyers		No	
Ban / Unban	Alvah	Zarzour	soheir.zarzour@app4legal.com	UC13	Administrator	Active	Both	Lawyers		No	
Activate / Deactivate	James	Marven	elise.khoury@app4legal.com	James UC8	Administrator	Active	Both	Lawyers	M&A	No	
Override Privacy											
Flag to Change Password	Alice	Jones	JonesAAlice21@gmail.com	UC6	Administrator	Active	Contra	Lawyers	Corporate Team; Contract Team	No	
Revoke API Key											
Permissions List	Micheal	Cavino	MichealCavin@outlook.com	UC5	associate	Active	Both	Consultants	Corporate Team	No	
U4 📧	Sam	Marven	carolinemrawed@outlook.com	UC4	User	Active	Both	Lawyers	Litigation Team	No	
U3 🔒	Maysa	Hakim	carolinemmrawed@gmail.com	UC3	Accountant	Active	Both	Lawyers		No	
U2 🔒	Aleen	Peterson	mrawedcroline2@gmail.com	UC2	Administrator	Active	Both	Lawyers	Procurement Team	No	
									Corporate Team;		

In case an admin wants to Ban a user from using the system, he can simply do it from the Ban option next to the user's name, choose to ban, and specify the reason.

Ban / Unban Form ⊗

Banned	● Yes ○ No ←
Ban Reason	|

Save   Cancel

Replace User by Another:

Moreover, the admin can deactivate a user in case he is no longer an employee or in case the admin wants to replace him with another user.

However, the admin should always make sure of the total number of purchased and used licenses for either core or contract within the instance.

For example, if the total number of licenses is 10 and the number of current users is 8, the system admin can still add 2 additional users.

ⓘ Therefore, in case the number of users exceeds the number of licenses, the admin can either deactivate one user and replace it with a new one, or he can purchase additional users' licenses.

Deactivating a user doesn't mean deleting it. As an admin, you can reactivate users at any time.

First, use the Advanced search to look for all users with inactive status within the system. Then, from the list of inactive users choose the one you want to reactivate.

Purchase Additional Licenses:

You can easily purchase additional user licenses as well:

Click to **expand your user base,** or navigate to the **Billing and Plan** and you will be directed to a page where you can select all that you need to purchase.

Select the products (Core or Contra) and the plan you wish to use.

Next, choose the modules (advisor portal or client portal) and Addons (Outlook, Gmail, Teams, or Collaborators) that you want to add to your plan, and specify the number of licenses to be purchased.

Lastly, fill out the payment details, and checkout.

Once all is done, the new license will be activated and you can directly add the new user(s).

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

Thank you!