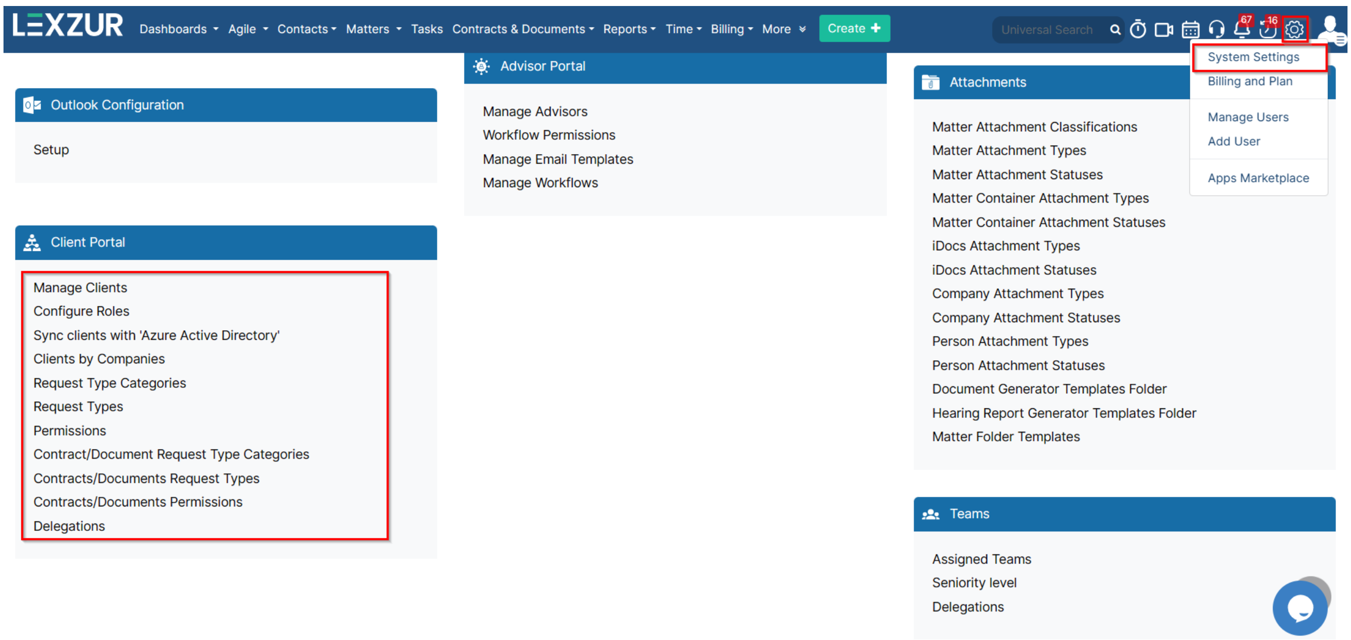
How to Configure the Client Portal?

Objectives

- How to manage your clients?
- How to Configure Roles?
- How to add a new request type category?
- How to add a new request type?
- How to set the permissions?
- How to add a new contract/document request type category?
- How to add a new contract/document request type?
- How to set the contract/document permissions?

Steps

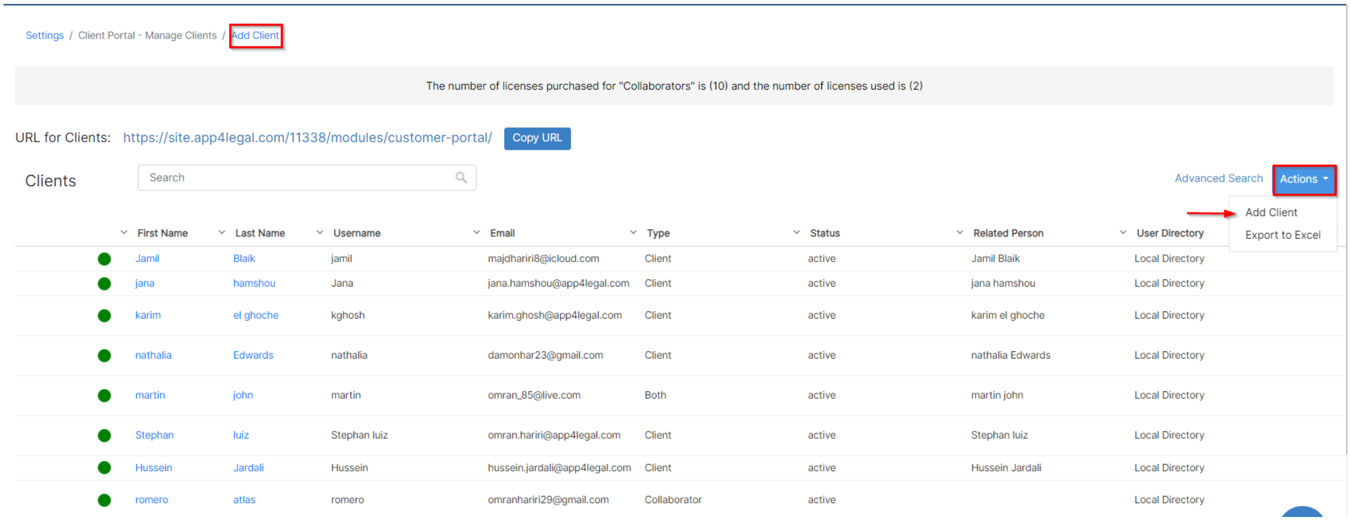
In LEXZUR, administrators can configure the client portal from within the system. To do so, navigate to the **System Settings** from the Settings icon in the top right of the main menu, then scroll to the **Client Portal** section where you can manage all its related settings.



- **Manage Clients:**

Clients are client portal users, requesters, or collaborators who are allowed to communicate with the legal team through the portal.

> Learn more about how to add and manage client portal users **here.**



First Name	Last Name	Username	Email	Type	Status	Related Person	User Directory
Jamil	Blaik	jamil	majdhariri8@icloud.com	Client	active	Jamil Blaik	Local Directory
jana	hamshou	Jana	jana.hamshou@app4legal.com	Client	active	jana hamshou	Local Directory
karim	el ghoche	kghosh	karim.ghosh@app4legal.com	Client	active	karim el ghoche	Local Directory
nathalia	Edwards	nathalia	damonhar23@gmail.com	Client	active	nathalia Edwards	Local Directory
martin	john	martin	omran_85@live.com	Both	active	martin john	Local Directory
Stephan	luiz	Stephan luiz	omran.hariri@app4legal.com	Client	active	Stephan luiz	Local Directory
Hussein	Jardali	Hussein	hussein.jardali@app4legal.com	Client	active	Hussein Jardali	Local Directory
romero	atlas	romero	omranhariri29@gmail.com	Collaborator	active		Local Directory

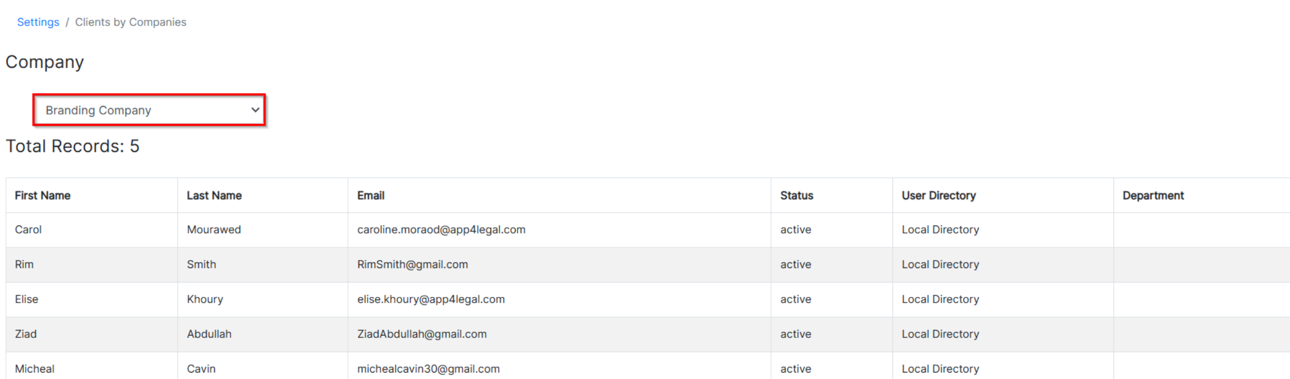
- **Configure Roles:**

LEXZUR allows you to configure roles for users based on company hierarchy, enabling you to specify the manager for each user.

> ⚠ Use this **guide** to learn how to configure roles and use them in the approval and signature process.

- **Clients by Companies:**

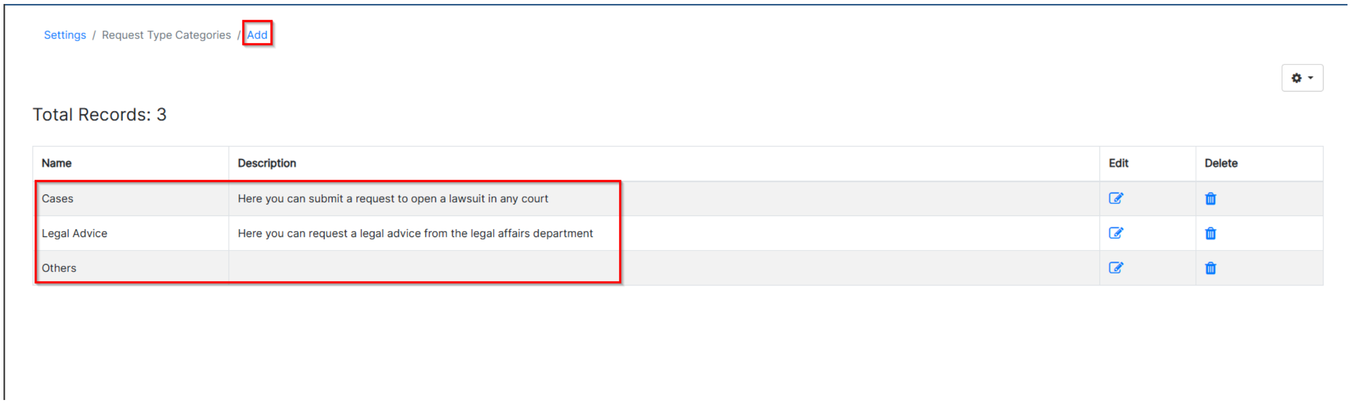
From this page, you can view the list of clients based on their related companies by simply selecting the company name from the list.



First Name	Last Name	Email	Status	User Directory	Department
Carol	Mourawed	caroline.moraod@app4legal.com	active	Local Directory	
Rim	Smith	RimSmith@gmail.com	active	Local Directory	
Elise	Khoury	elise.khoury@app4legal.com	active	Local Directory	
Ziad	Abdullah	ZiadAbdullah@gmail.com	active	Local Directory	
Micheal	Cavin	michealcavin30@gmail.com	active	Local Directory	

- **Request Type Categories:**

Add a new category for the requests that will be visible to your clients through the portal. You will later create request types that fit into one of these categories.

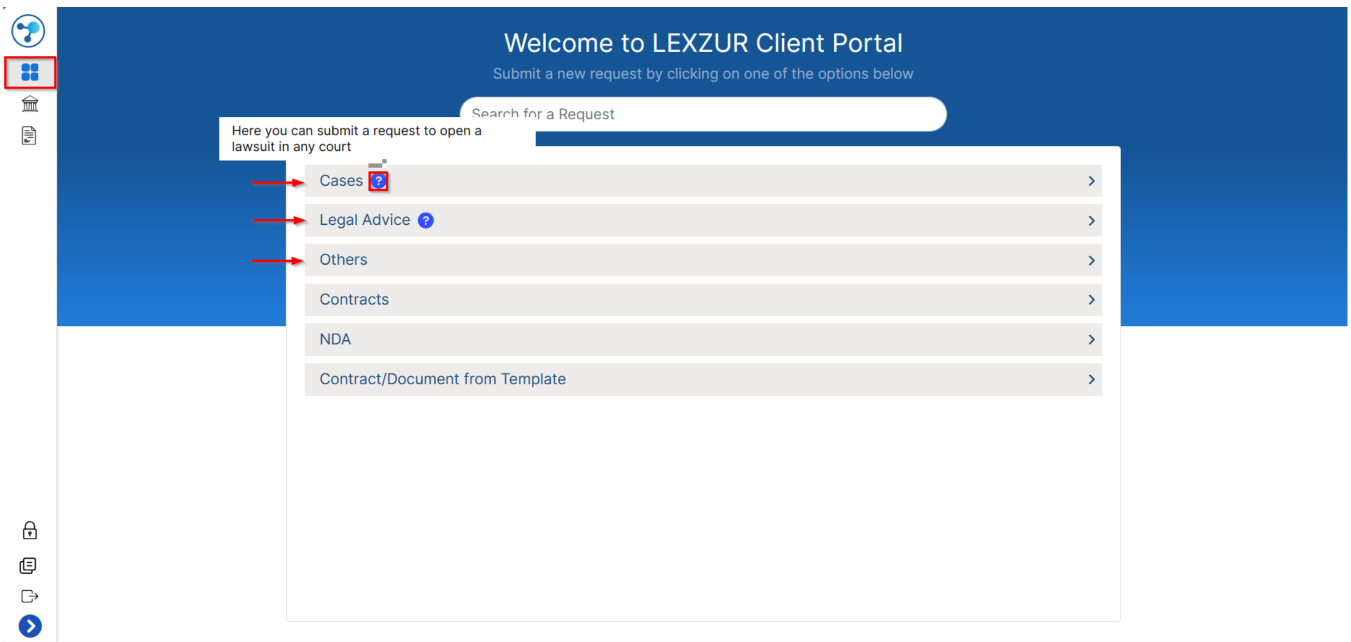


Settings / Request Type Categories / Add

Total Records: 3

Name	Description	Edit	Delete
Cases	Here you can submit a request to open a lawsuit in any court		
Legal Advice	Here you can request a legal advice from the legal affairs department		
Others			

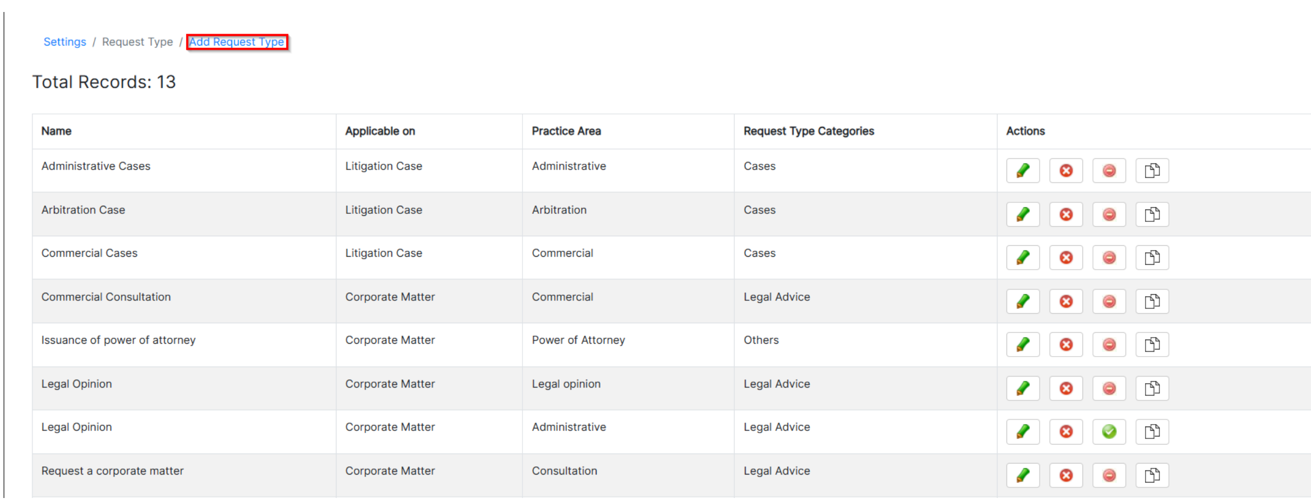
Accordingly, the client portal's home page will be divided between each category and its corresponding requests.



- **Request Type:**

Request Types are the predefined forms set by the legal team to allow their clients to request matters or cases from the portal.

The process is as simple as creating an online form. Start by adding a new one using the "Add Request Type" hyperlink.



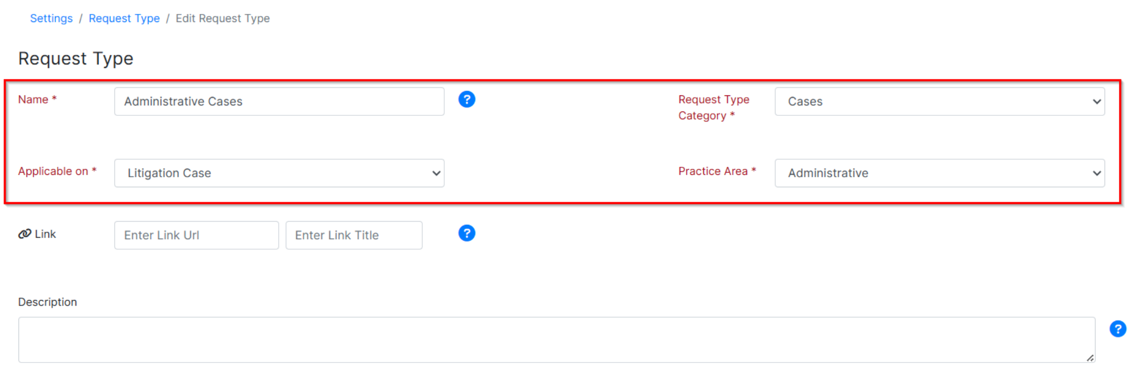
Settings / Request Type / Add Request Type

Total Records: 13

Name	Applicable on	Practice Area	Request Type Categories	Actions
Administrative Cases	Litigation Case	Administrative	Cases	
Arbitration Case	Litigation Case	Arbitration	Cases	
Commercial Cases	Litigation Case	Commercial	Cases	
Commercial Consultation	Corporate Matter	Commercial	Legal Advice	
Issuance of power of attorney	Corporate Matter	Power of Attorney	Others	
Legal Opinion	Corporate Matter	Legal opinion	Legal Advice	
Legal Opinion	Corporate Matter	Administrative	Legal Advice	
Request a corporate matter	Corporate Matter	Consultation	Legal Advice	

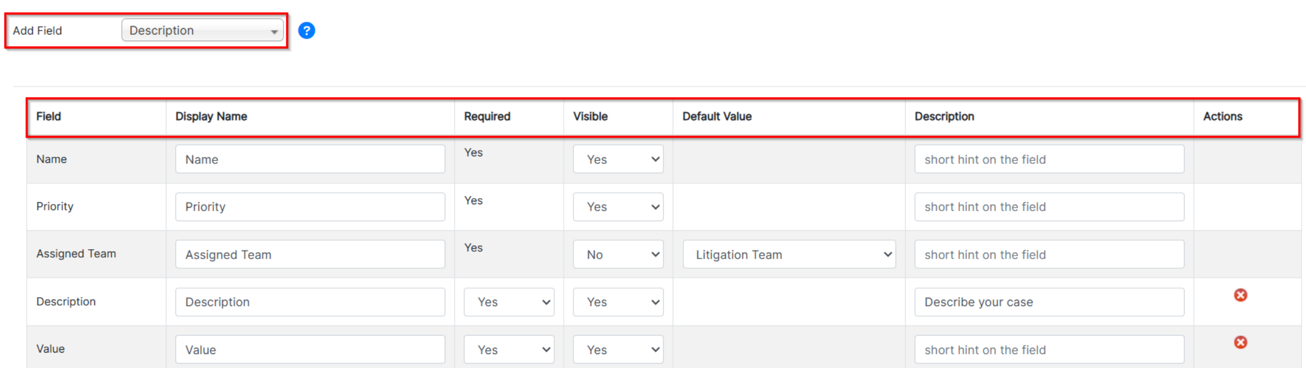
The Request Type form has many important fields:

- **Name:** Name of the Request Type, for example, "Legal Request".
- **Request Type Category:** This is the category associated with this request type.
- **Applicable on:** Specify if this request type is applicable to Corporate Matters or Litigation Cases.
- **Practice Area:** For this particular category, select the relevant practice area.
- **Description:** A short hint that describes the request type and when it should be used to make it easy for users.

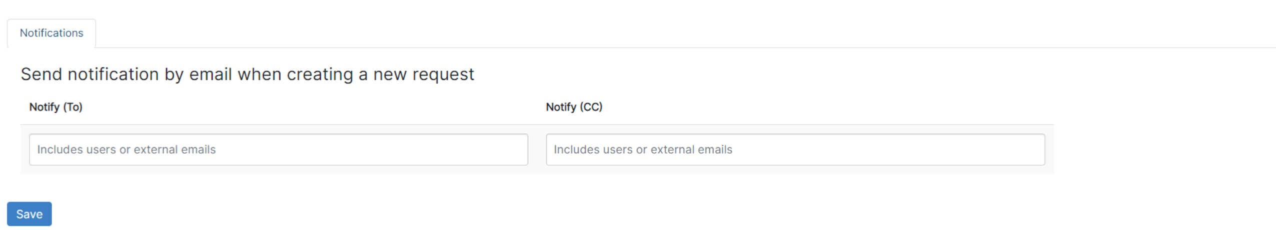


The default fields of the Request Type are the mandatory fields in a request. They are by default filled in every Request Type to be designed. The fields are Name, Priority, and Assigned Team. The administrator can set them as visible so that the client can fill them in.

- Add Field: select from a pool of fields the needed fields to appear in the Request Type. The Fields that are not mandatory in a request can be ordered in the same way that they are added. They can be set as not Required with no need to add a Default Value for them.
- Display Name: could be changed as desired.
- Default Value: it is the preset value that the admin should add if a mandatory field is set to be hidden.
- Description: a short hint under the field to indicate the descriptive need of it.
- Actions: to change the field's order and if you want to delete non-mandatory fields.



In the notification section, you can specify the user who will receive a notification once a new request is created.



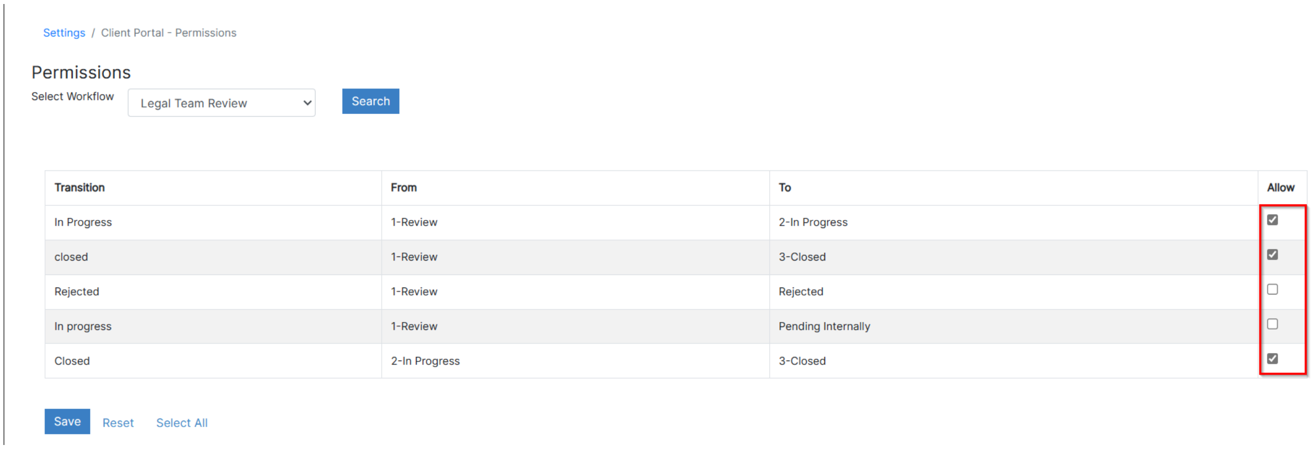
- **Permissions:**

The Permissions page will display all the Transitions in the system.

The admin can grant the needed permissions so that the client can be able to change the Status from within the Client Portal interface.

> ⚠ This strictly depends on the business need of every client.

If there is permission granted to the clients to change a Status of a matter to for example "In Progress" while there are configured SLAs related to this Status, the SLA counters will automatically start the counters. Hence, granting the Client such permissions should be dealt with care.

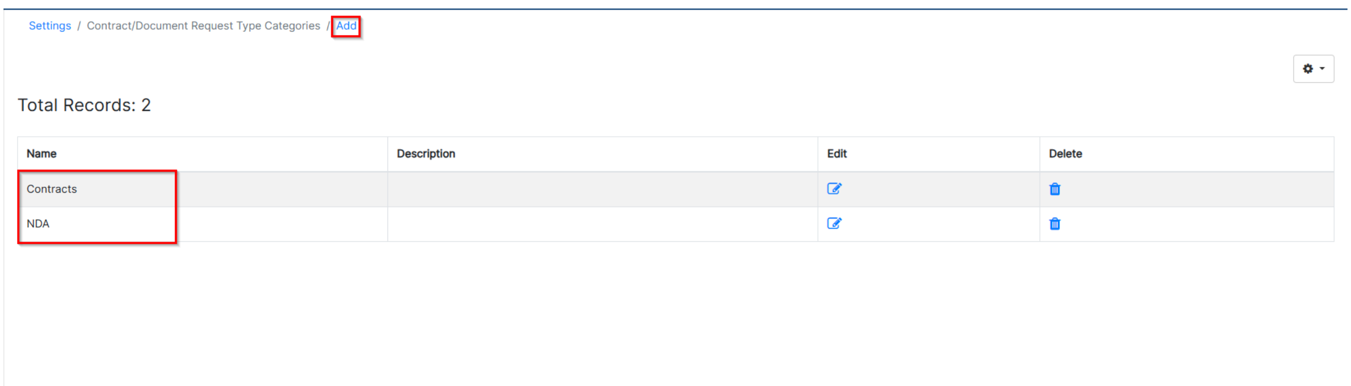


Check the transition to grant each permission to all Client Portal Users.

- **Contract/Document Request Type Category:**

The contract request type categories are managed through the contract/document request type categories under the client portal section.

Using the Add hyperlink, the administration can add a new Request Type category. You will later create contract request types that fit into one of these categories.



Accordingly, the client portal's home page will be divided between each category and its corresponding requests.

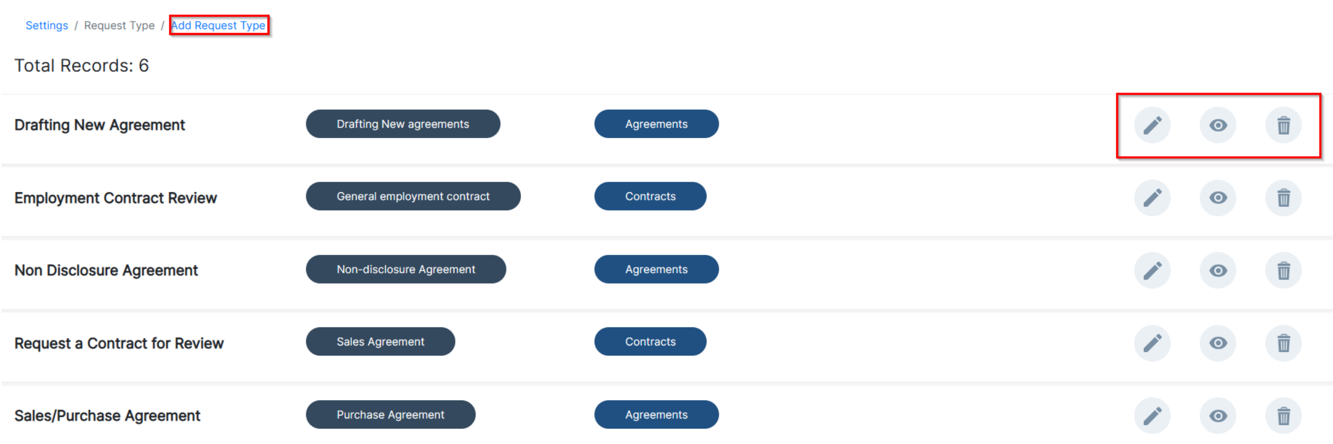
- **Contract/Document Request Type:**

Contract/Document Request Types are the predefined forms set by the legal team to allow their clients to request contracts from the client portal.

They are managed through the Contract/Document Request types under the Client Portal settings section.

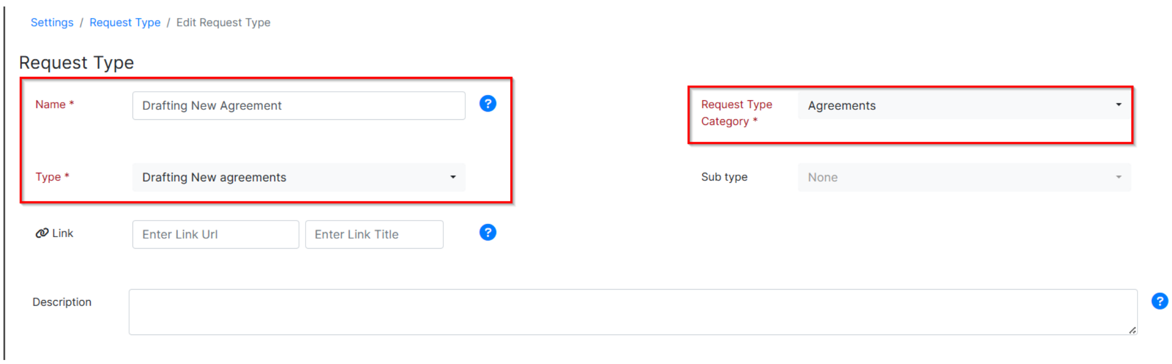
Using the actions on the left, the admin can edit, delete or hide/un-hide a Request Type from the Portal.

Using the Add Request Type hyperlink the administration can add a new Request Type.

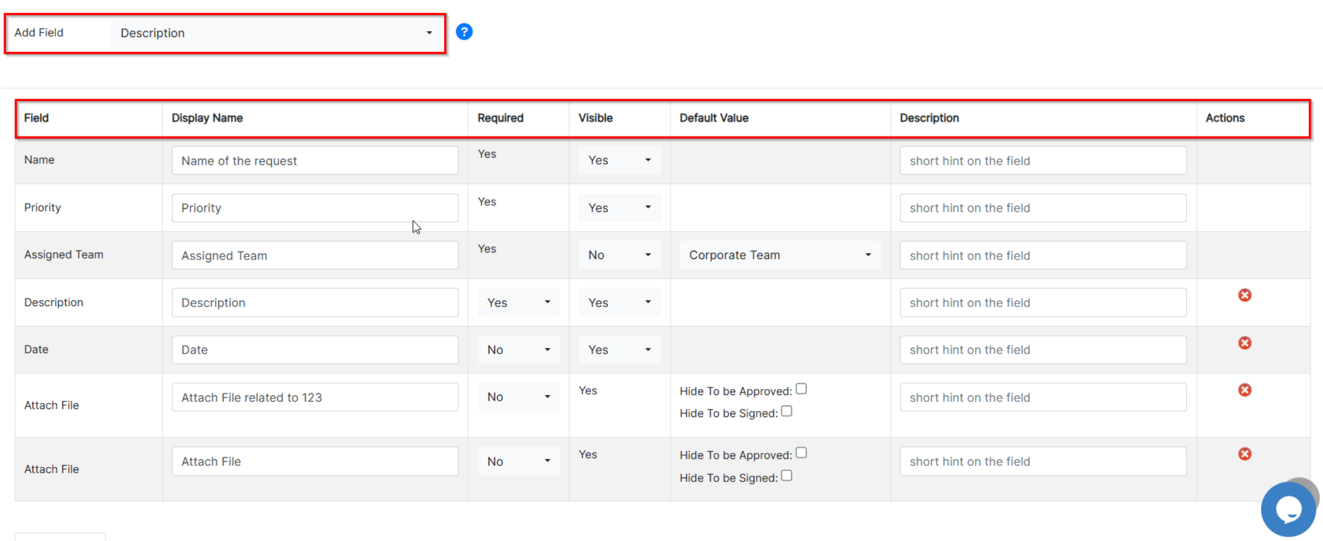


The Request Type form has many important fields:

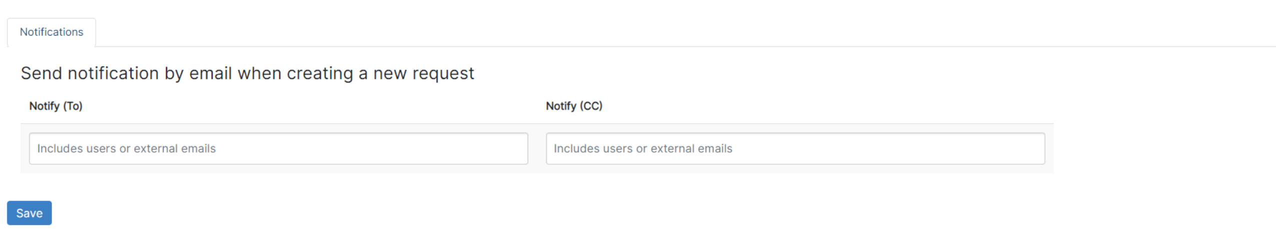
- Name: name of the Request Type; for example "Service Agreement".
- Request type category: This is the category associated with this request type.
- Type: The contract/Document type.
- Sub-type: if there is any.
- Description: A short hint that describes the request type and when it should be used.



- **Default Fields of the Request Type:** They are the mandatory fields in a request. They are by default filled in every Request Type to be designed. The fields are Name, Priority, and Assigned Team. The administrator can set them as required so that the client fills them in. Or, as an alternative, one or more of these fields can be set as Not Required and a value by default is preset by the administrator.
- **Add Field:** select from a pool of Fields the needed Fields to appear in the Request Types. The Fields that are not mandatory in a request can be ordered in the same way that they are added. They can be set as not Required without adding a Default Value for them.
- **Display Name:** It could be changed as desired.
- **Default Value:** It is the preset value that the admin should add if a mandatory field is set to be hidden.
- **Description**: is a short hint under the field to indicate the descriptive need of it.
- **Actions**: to change the field's order and if you want to delete non-mandatory fields.



In the notification section, you can specify the user who will receive a notification once a new contract/document request is created.



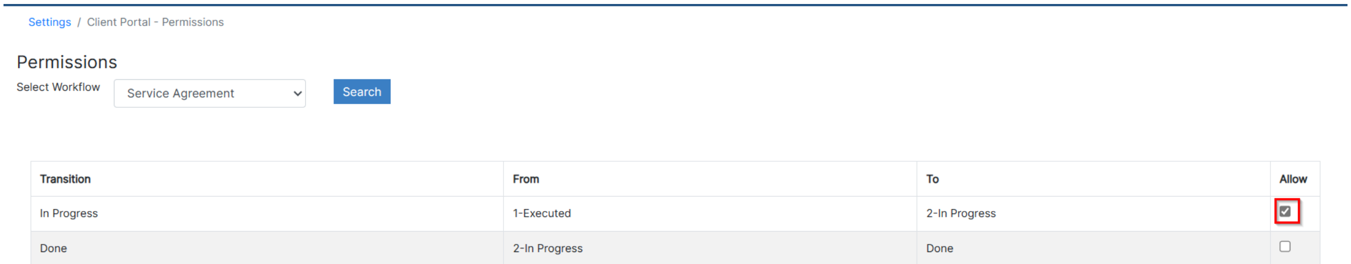
- **Contract/Document Permissions:**

The Permissions page will display all the Transitions in the system.

The admin can grant the needed Permissions so that the client will be able to change the Status from within the Client Portal interface.

> ⚠ This strictly depends on the business need of every Client.

If there is permission granted to the Clients to change a Status of a document/contract to for example "In Progress" while there are configured SLAs related to this status, the SLA counters will automatically start the counters. Hence, granting the Client such permissions should be dealt with care.



If the Transition is checked, this means that permission is granted to all Client Portal Users.

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

Thank you!