

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.

The screenshot shows the LEXZUR system settings interface. The top navigation bar includes 'Dashboards', 'Agile', 'Contacts', 'Matters', 'Tasks', 'Contracts & Documents', 'Reports', 'Time', 'Billing', 'More', and a 'Create +' button. A 'Universal Search' bar is on the right. The main content area is divided into three columns. The left column has 'Outlook Configuration' and 'Client Portal' sections. The 'Client Portal' section is highlighted with a red box and contains: 'Manage Clients', 'Configure Roles', 'Sync clients with 'Azure Active Directory'', 'Clients by Companies', 'Request Type Categories', 'Request Types', 'Permissions', 'Contract/Document Request Type Categories', 'Contracts/Documents Request Types', 'Contracts/Documents Permissions', and 'Delegations'. The middle column has an 'Advisor Portal' section with: 'Manage Advisors', 'Workflow Permissions', 'Manage Email Templates', and 'Manage Workflows'. The right column has an 'Attachments' section with a list of attachment types and statuses, and a 'Teams' section with: 'Assigned Teams', 'Seniority level', and 'Delegations'. A 'System Settings' dropdown menu is open in the top right, showing 'Billing and Plan', 'Manage Users', 'Add User', and 'Apps Marketplace'.

- **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](#).

The number of licenses purchased for "Collaborators" is (10) and the number of licenses used is (2)

URL for Clients: <https://site.app4legal.com/11338/modules/customer-portal/> **Copy URL**

Clients

Advanced Search **Actions** Add Client
Export to Excel

First Name	Last Name	Username	Email	Type	Status	Related Person	User Directory
Jamil	Blaik	jamil	majdharin8@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.

Company

Total Records: 5

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:

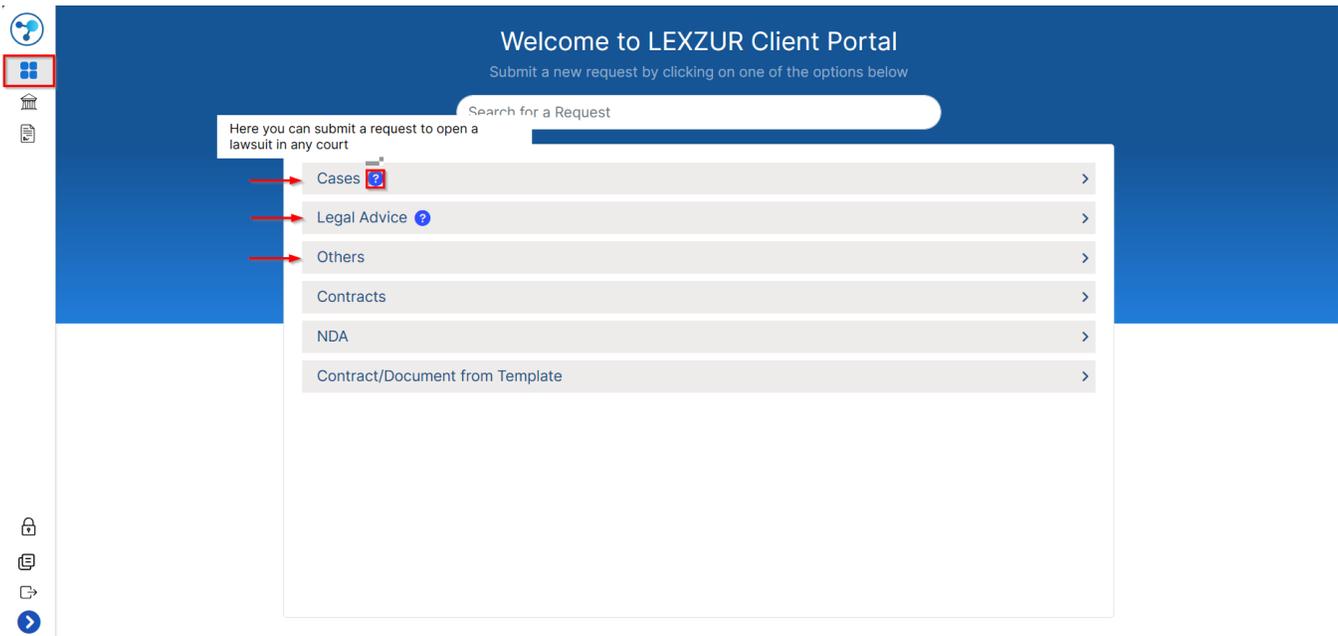
Add a new category for the requests that will be visible to your clients through the portal. You will later create request types that fit into one of these categories.

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.

Settings / Request Type / Edit Request Type

Request Type

Name * ? **Request Type Category ***

Applicable on * **Practice Area ***

Link ?

Description

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.

Add Field ?

Field	Display Name	Required	Visible	Default Value	Description	Actions
Name	<input type="text" value="Name"/>	Yes	Yes <input type="text"/>		<input type="text" value="short hint on the field"/>	
Priority	<input type="text" value="Priority"/>	Yes	Yes <input type="text"/>		<input type="text" value="short hint on the field"/>	
Assigned Team	<input type="text" value="Assigned Team"/>	Yes	No <input type="text"/>	<input type="text" value="Litigation Team"/>	<input type="text" value="short hint on the field"/>	
Description	<input type="text" value="Description"/>	Yes <input type="text"/>	Yes <input type="text"/>		<input type="text" value="Describe your case"/>	<input type="text" value="✘"/>
Value	<input type="text" value="Value"/>	Yes <input type="text"/>	Yes <input type="text"/>		<input type="text" value="short hint on the field"/>	<input type="text" value="✘"/>

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

Notifications

Send notification by email when creating a new request

Notify (To) **Notify (CC)**

- **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.

Settings / Client Portal - Permissions

Permissions

Select Workflow: Legal Team Review Search

Transition	From	To	Allow
In Progress	1-Review	2-In Progress	<input checked="" type="checkbox"/>
closed	1-Review	3-Closed	<input checked="" type="checkbox"/>
Rejected	1-Review	Rejected	<input type="checkbox"/>
In progress	1-Review	Pending Internally	<input type="checkbox"/>
Closed	2-In Progress	3-Closed	<input checked="" type="checkbox"/>

Save Reset Select All

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.

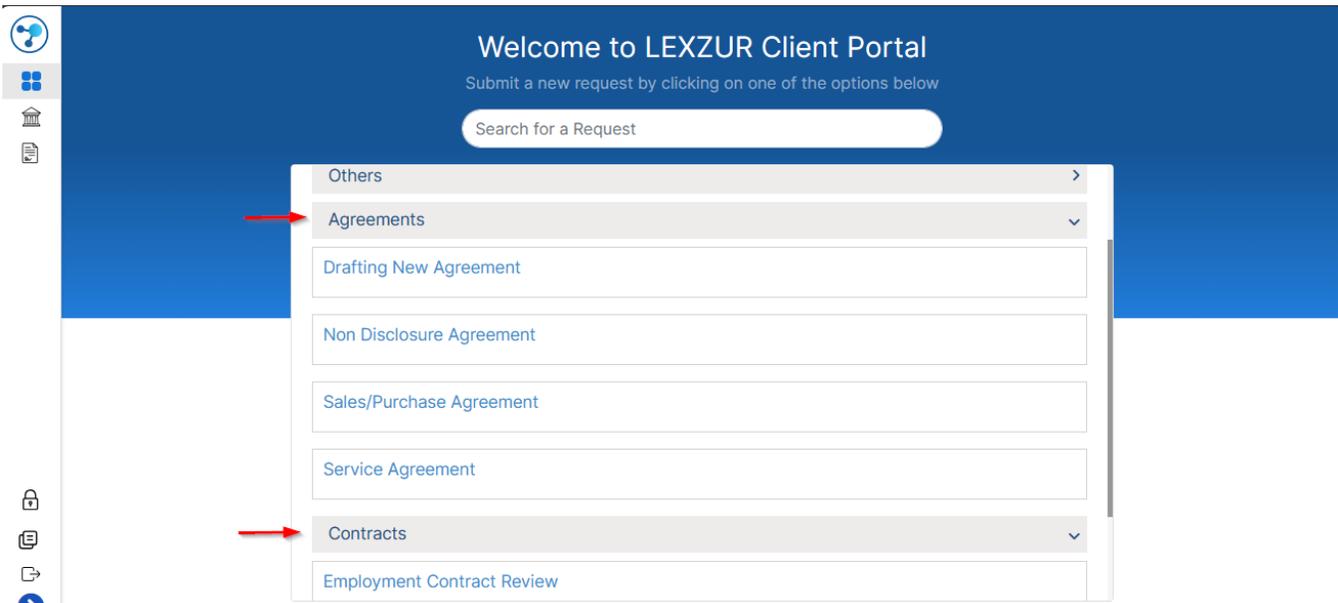
Using the Add hyperlink, the administration can add a new Request Type category. You will later create contract request types that fit into one of these categories.

Settings / Contract/Document Request Type Categories Add

Total Records: 2

Name	Description	Edit	Delete
Contracts			
NDA			

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.

Settings / Request Type / [Add Request Type](#)

Total Records: 6

Drafting New Agreement	Drafting New agreements	Agreements	  
Employment Contract Review	General employment contract	Contracts	  
Non Disclosure Agreement	Non-disclosure Agreement	Agreements	  
Request a Contract for Review	Sales Agreement	Contracts	  
Sales/Purchase Agreement	Purchase Agreement	Agreements	  

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.

Request Type

Name * ?

Request Type Category * Agreements

Type * Drafting New agreements

Sub type None

Link ?

Description ?

- **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.

Add Field Description ?

Field	Display Name	Required	Visible	Default Value	Description	Actions
Name	<input type="text" value="Name of the request"/>	Yes	Yes		<input type="text" value="short hint on the field"/>	
Priority	<input type="text" value="Priority"/>	Yes	Yes		<input type="text" value="short hint on the field"/>	
Assigned Team	<input type="text" value="Assigned Team"/>	Yes	No	Corporate Team	<input type="text" value="short hint on the field"/>	
Description	<input type="text" value="Description"/>	Yes	Yes		<input type="text" value="short hint on the field"/>	✖
Date	<input type="text" value="Date"/>	No	Yes		<input type="text" value="short hint on the field"/>	✖
Attach File	<input type="text" value="Attach File related to 123"/>	No	Yes	Hide To be Approved: <input type="checkbox"/> Hide To be Signed: <input type="checkbox"/>	<input type="text" value="short hint on the field"/>	✖
Attach File	<input type="text" value="Attach File"/>	No	Yes	Hide To be Approved: <input type="checkbox"/> Hide To be Signed: <input type="checkbox"/>	<input type="text" value="short hint on the field"/>	✖

Notifications

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

Send notification by email when creating a new request

Notify (To) Notify (CC)

Save

- **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.

Settings / Client Portal - Permissions

Permissions

Select Workflow

Service Agreement

Search

Transition	From	To	Allow
In Progress	1-Executed	2-In Progress	<input checked="" type="checkbox"/>
Done	2-In Progress	Done	<input type="checkbox"/>

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!