

# How to Share Contracts/Documents with the Client Portal

## Objectives

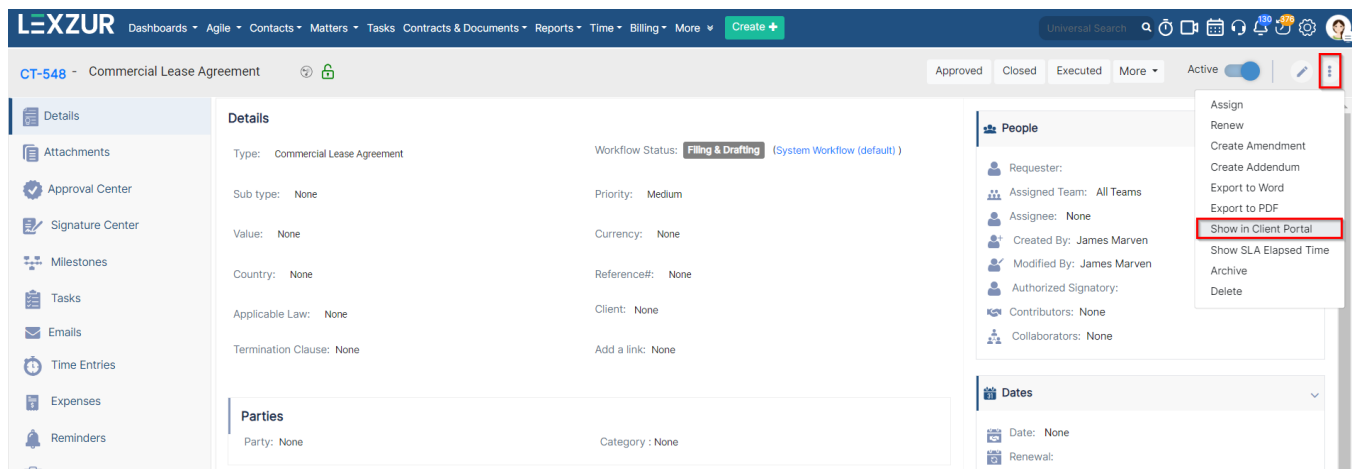
- Share Contracts with Requesters or watchers
- Share Attachments with the Client Portal
- Share Milestones with the Client Portal
- Add Collaborators to Approve and Sign Contracts

## Steps

- **Share Matters/Contracts with Clients:**

To share a contract with your clients via the client portal. Open the contract you wish to send, from the main application.

Then from the contract's page click on the 3 dots on the top right and choose "Show in Client Portal"



Identify the Requester, who is the client portal user asking for this contract. Additionally, you have the option to share this contract with Watchers, who are other client portal users you wish to grant access to view it from their perspective.

You can also allow all attachments to be visible in the client portal directly from this window.

### Show Contract/Document in Client Portal

Requester\*

Julia Marven

Watchers

Albert Smith

☒ Show all attachments in Client Portal

Please note that only Client Portal users that are listed under the same company as the Requester can be selected as Watchers. You can edit this info in [Manage Client Settings](#).

Save

Cancel



To share contracts with Watchers, they must be listed under the same company as the requester. Otherwise, sharing contracts with any client portal user is not feasible. You can manage this via the client portal settings. Click on the provided link in the window, or navigate to **Settings -> Client Portal -> Manage Clients**.

Here, you can edit client information and add the company name for each client. Client portal users who belong to the same company can then view each other's requests if needed.

**L=XZUR** Dashboards ▾ Agile ▾ Contacts ▾ Matters ▾ Tasks ▾ Contracts & Documents ▾ Reports ▾ Time ▾ Billing ▾ More ▾ [Create](#) Universal Search 🔍 📅 🔔 🛠️

URL for Clients: <https://site.app4legal.com/7691/modules/customer-portal/> [Copy URL](#)

URL for clients using Azure Active Directory [https://site.app4legal.com/7691/modules/customer-portal/users/login\\_idps/azure\\_ad](https://site.app4legal.com/7691/modules/customer-portal/users/login_idps/azure_ad) [Copy URL](#)

Clients  Advanced Search Actions

	First Name	Last Name	Username	Email	Type	Status	Related Person	User Directory	Company
●	Adam	Christopher	Adam	ademchristopherr@gmail.com	Both	active	Adam Christopher	Local Directory	IT Departmer
●	Albert	Smith	Albert Smith	albertsm052@gmail.com	Collaborator	active	Albert smith	Local Directory	Global Tech; HR Departme
●	Carol	Mourawed	CM	caroline.morad@app4legal.com	Both	active		Local Directory	Branding Cor
●	Elise	Khoury	elise.khoury@app4legal.com	elise.khoury@app4legal.com	Both	active	Elise Khoury	Local Directory	Branding Cor Astra Digital I
●	Jana	Jana	Hamshou	jana.hamshou@app4legal.com	Collaborator	active	Jana Jana	Local Directory	
●	Jimmy	Jones	jimmy	omranhariri29@gmail.com	Client	active	Jimmy Jones	Local Directory	HR Departme
●	Julia	Marven	Julia	marvenjulia@gmail.com	Client	active	Julia Marven	Local Directory	HR Departme
●	Mariana	QZ	MQZ	manal.zeidan@lexzur.com	Both	active	Mariana QZ	Local Directory	abc
●	Micheal	Cavin	MichealCav	michealcavin30@gmail.com	Collaborator	active	Micheal Cavin	Local Directory	Branding Cor HR Departme
●	Rim	Smith	Reem	RimSmith@gmail.com	Client	active	Rim Smith	Local Directory	Branding Cor
●	Sam	Robinson	MSA	soheir.zarour@gmail.com	Both	active	Sam Abed	Local Directory	abc
●	Sara	Malbeck	SaraM	saramalbeck1@gmail.com	Client	active	Sara Malbeck	Local Directory	Global Tech

The client and the watcher (if added) will receive an email that a new contract is shared with them and they can now access it from the Contracts page from the Client Portal.



The green line next to a contract, or document name means that it is visible from the client portal.

Contracts & Documents All Save as Export Tools

1 - 20 of 302 items Search Advanced Columns

ID	Name	Value	Type	Currency	Status	Workflow Status	Date	Start date
	- BLPC		contract					
CT-557	General employment contract - BLPC	0.00	General employment contract		Active	Filing & Drafting		
CT-556	Distribution Agreement - BLP industry	0.00	Distribution Agreement		Active	Filing & Drafting		
CT-555	General employment contract - Legal Files	0.00	General employment contract		Active	Filing & Drafting		
CT-554	Franchise Agreement - BLP industry	0.00	Franchise Agreement		Active	New Request		
CT-553	Consultancy Agreement - BLP industry	0.00	Consultancy Agreement		Active	Under Approval		

- **Share Attachments with Client Portal:**

Additionally, users can share the related attachments with their clients in the client portal.

Therefore, from the Attachments tab of the Contracts, select the File/Folder and click "Show in Client Portal"

**LEXZUR** Dashboards Agile Contacts Matters Tasks Contracts & Documents Reports Time Billing More [Create +](#) Universal Search

CT-548 - Commercial Lease Agreement Approved Closed Executed More Active Toggle

**Attachments**

Lexzur Documents Google Drive SharePoint OneDrive Dropbox

Download Rename Open in Move Copy To Share with List versions **Show in Client Portal** Convert to PDF 1 Selected

Delete

CT-548

Name	Type	Status	Keywords	File Size	Added On	Added By	Modified
CLA				-	2024-04-04 15:31:27	James Marven	James
Contracts to be Reviewed.docx	Word Document			12.4 kB	2024-04-11 16:25:30	Carolina Robins...	Carol



You have the option to choose whether attachments should be visible by default when the contract is displayed in the client portal, from the contract settings.

### • Share Milestones with Client Portal:

Milestones will be visible in the client portal by default if the Contract is visible in the portal.

However, users can control milestones visibility also from the contracts page in the main system. From the Milestones tab of Contracts, click to hide or show milestones from the Client Portal.

CT91 - Service Agreement between BLP and Alvah Cancelled Executed Filing & Drafting More Active Toggle

**Milestones** **Hide from Client Portal** Add Milestone

Title	Start date	May 2023
Completion o...	2023-05-23	1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29

**Milestones**

1	Completion of Testing	In Progress	Paid
---	-----------------------	-------------	------

### • Add Collaborator to Approve and Sign Contracts:

In Contra, users can add their collaborators as approvers or signees.

Therefore, from the contract's Approval Center and Signature Center, add the approver or signee by specifying the Collaborator type, then add their names respectively.

1

Users

Sam Marvinen

+

✕

Approval Label / Summary

2

Collaborators

Albert Smith

+

✕

Users

Collaborators

User Groups

Assignee

Board member

Shareholder

+ Add

Save

Cancel

Details

Attachments

Approval Center

Signature Center

Milestones

Tasks

Time Entries

Expenses

Emails

Reminders

Matters

Approval Criteria:

Approval Status: Awaiting Approval

Edit Approvers

2

Sam Marvinen

Pending

CEO

Show Summary

Open Contract/Document

Send Email

Resend Approval Email

👤

✅

❌

3

Albert Smith

Pending

Show Summary

Open Contract/Document

Send Email

Resend Approval Email

👤

✅

❌

Approval history

The Collaborator will then receive the contract from their contract's page in the client portal and they can start collaborating on it.


[Learn more about how collaborators can use the client portal here.](#)

For more information about LEXZUR, kindly reach out to us at [help@lexzur.com](mailto:help@lexzur.com).

Thank you!