

How to use the Advisor Portal from Advisor Perspective

Objectives

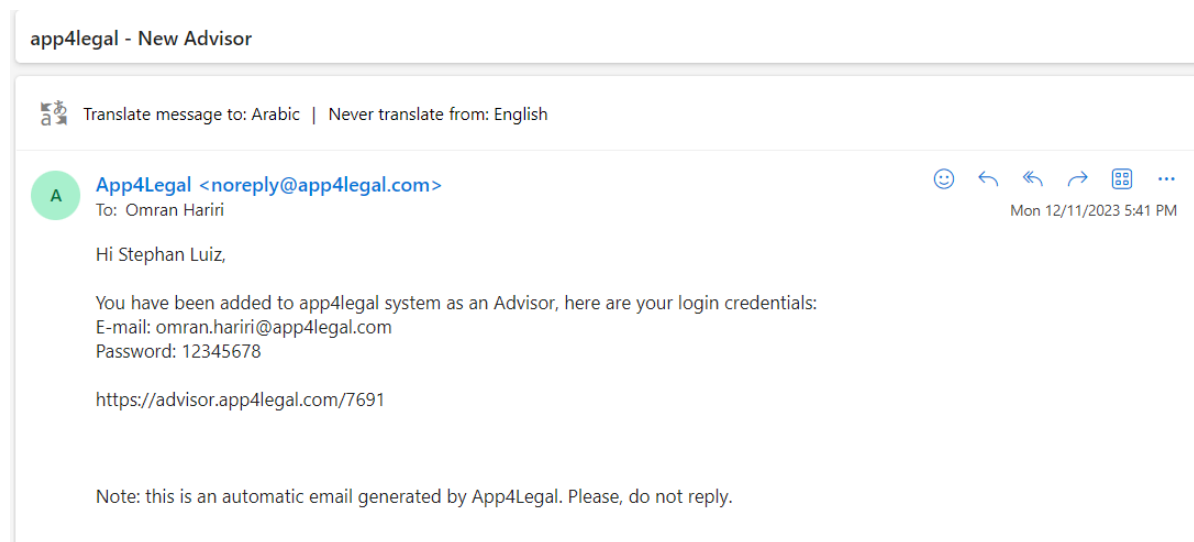
- Access the portal
- Collaborate on the outsourced matters/cases
- Add new items (Tasks-Time logs-Bills-Hearings...)

Steps

Legal teams frequently outsource some of their work to External Advisors.

As a consultant, legal expert, accountant, external lawyer, or financial advisor, you can easily access and collaborate on matters, litigation cases, and tasks outsourced to you, through LEXZUR Advisor Portal.

Once the admin adds a new advisor, he will receive an email with the URL of the advisor portal and the login credentials.



As an advisor, click on the advisor portal link, enter the email and password, then click on login. You will be asked to set a new password once you log in.



[Forgot your password?](#)

LOGIN



If the Multi-Factor Authentication was enabled, an authentication code will be required to log in. The code will be sent to your email.

Upon login, you will be directed to your dashboard page where you can view your current and upcoming tasks, hearings, and time logs.



You can control and select the widgets you wish to see on this page from the 3 lines on the top right.

LEXZUR

Add

Corporate Matters

Litigation Cases

Hearings

Tasks

My Time Logs

Manage Timers

Bills

English

My Profile

Logout

View All >>

My billable vs non-billable hours

Billable Hours

Non Billable Hours

367.2

My billable vs non-billable hours logged today

Billable Hours

Non Billable Hours

Total Hours

0

The side menu is where you can access all your corporate matters, litigation cases, hearings, tasks, time logs, and bills, or add new items.

Corporate Matters:

The corporate matters that are outsourced by the legal team could be accessed from the corporate matter section.

LEXZUR

Add

Corporate Matters

Litigation Cases

Hearings

Tasks

My Time Logs

Manage Timers

Bills

Corporate Matters

ID

Name

Description

Practice Area

Priority

Value

Arrival Date

Due Date

M115

Setting up our branch in KSA

Consultation

critical

0.00

2022-10-03

M113

Legal opinion for service agreement for BLP

Legal opinion

high

0.00

2022-09-28

2022-10-08

M116

Agreement Drafting

It is an agreement drafting 1 2 3

Agreement

high

0.00

2022-10-20

2022-11-04

M118

Legal opinion for BLP

Legal opinion

medium

0.00

2022-10-31

2022-11-16

Click on the ID or name of the matter to open its page. You can edit, update the workflow status, add notes, and view the matter details from the General info tab.

LEXZUR

+

 Add

Corporate Matters

Litigation Cases

Hearings

Tasks

My Time Logs

Manage Timers

Bills

English

My Profile

Logout

Legal opinion for service agreement for BLP

Legal opinion

GENERAL INFO

RELATED TASKSRELATED TIME LOGSBILLSRELATED DOCUMENTS

EDIT

ADD NOTE

OPEN

IN PROGRESS

PENDING

MORE

MATTER DASHBOARD

Practice Area:Legal opinion

Status:Closed

Internal Ref Number:

Matter Priority:high

Stage:

Success Probability:

Arrival Date:2022-09-28

Filed On:2022-09-28

Due Date:2022-10-08

Closed On:

Client Name:BLP industry

Total Spent Hrs:7.44

MATTER DETAILS

Name:Legal opinion for service agreement for BLP

Value:0.00

Outsourced To:Elise Khoury

Description:

In the following tabs, you can view or add tasks, time logs, bills, and documents related to this matter.

LEXZUR

+

 Add

Corporate Matters

Litigation Cases

Hearings

Tasks

My Time Logs

Manage Timers

Bills

English

Legal opinion for service agreement for BLP

Legal opinion

GENERAL INFO

RELATED TASKS

RELATED TIME LOGSBILLSRELATED DOCUMENTS

+ ADD TASK

Search

x

↺

↻

ID	Description	Type	Due Date	Status	Priority	Estimated Effort
T40	Meeting with the client	To-Do	2023-12-12	1-Open	medium	

Litigation Cases:

The same applies to litigation cases. You can also have access to all the litigation cases outsourced to you, view and update the general information, add a new litigation stage, or change the existing one, add hearings, time logs, and tasks, and view the related tasks and documents.

LEXZUR

Add
Corporate Matters
Litigation Cases
Hearings
Tasks
My Time Logs
Manage Timers
Bills

BLP x ALvah

Constitutional Court

GENERAL INFO
LITIGATION STAGES
ACTIVITIES
RELATED TASKS
RELATED TIME LOGS
BILLS
RELATED DOCUMENTS

Current Stage : **Appeal Court**
CHANGE STAGE

FIRST INSTANCE COURT- المحكمة الابتدائية
درجة أولى / المحكمة الابتدائية
Judged

APPEAL COURT
Ongoing

Hearings:

There is also a separate Hearing page, where you can track all your hearings along with their details, you can also add new hearings, and simply click on the hearing date to edit, postpone, or set judgments.

LEXZUR

Add
Corporate Matters
Litigation Cases
Hearings
Tasks
My Time Logs
Manage Timers
Bills

Hearings

+ ADD

Q Search

×

↺

↻

	Date ↑	Matter Name	Type	Stage	Assignee(s)	Summary	Comments	Judged?	Judgment
≡	2023-10-26 18:17:00	Agency Grid X ABC Company	Answering note	Dispute	Micheal Cav	Answering hearing notes		Yes	Travel Ban
≡	2023-10-25 13:13:24	Agency Grid X ABC Company	Expert hearing	Appeal Court	Micheal Cav			No	
≡	2023-10-25 14:57:55	Agency Grid X ABC Company	Online Hearing		Eleanor Jones, Anna Peterson			No	

Tasks:

Manage your tasks on a separate page, add, edit, change workflow, add notes to the legal team, and so on.

LEXZUR

+ ADD

⌕ Add

🏠 Corporate Matters

⚖️ Litigation Cases

🗂️ Hearings

☑️ Tasks

🕒 My Time Logs

⌚ Manage Timers

📄 Bills

Tasks

⌕ Search

×

↺

⚙️

<input type="checkbox"/>	ID	Description	Type	Due Date	Status	Priority	Estimated Effort
<input type="checkbox"/>	T40	Meeting with the client	To-Do	2023-12-12	1-Open	medium	<div>SHOW DETAILS</div>

Time Logs:

You can log time entries that are related to either Matters or Tasks. All you have to do is specify the type, matter/task name, date, and effort. Time logs could also be billable or non-billable.

Billable time logs could be invoiced later on.

Log Time

User *

Stephan Luiz

☒ Matter

☐ Task

Matter *

☐ Billable

☐ Non Billable

Time spent on

Meeting

Date *

2023-12-11

Effective Effort *

2

SAVE

CANCEL

You can also track your time on the portal by starting a timer. You can pause, cancel, or end the timer at any time.

My Timers

No Task

[Setting up our branch in KSA](#)

No Description

ADD TIMER

00:00:10

CANCEL TIMER

END TIMER

CANCEL



At the bottom, you have a language option to change the language of the application and from My profile, you can manage your profile and change the password.

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

Thank you!