

# How to use the Client Portal as Client

## Objectives

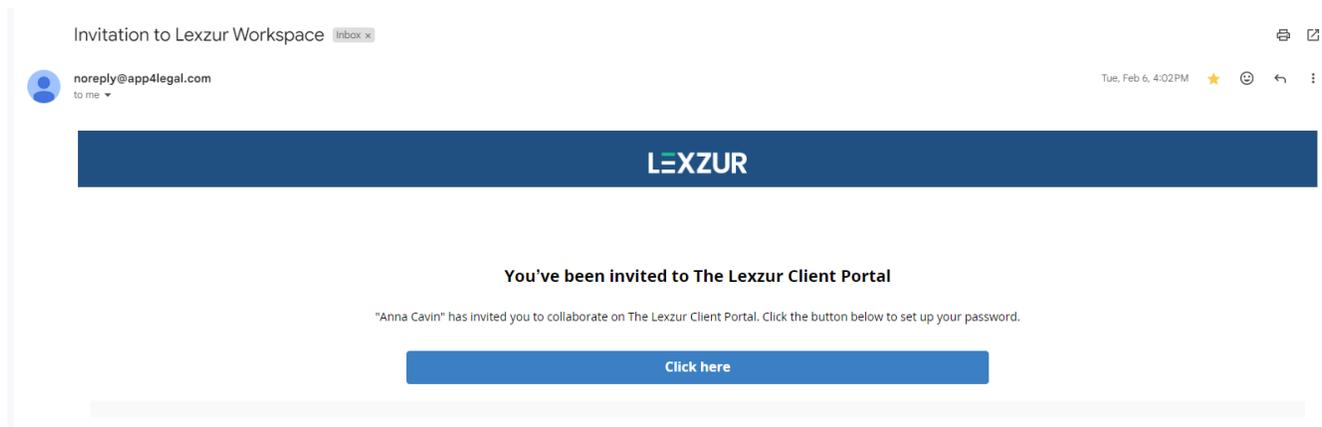
- [Access the portal](#)
- [Request and follow up on matters/cases/contracts through the Client Portal](#)

## Steps

LEXZUR Client Portal allows legal teams to collaborate and communicate with their clients and requesters. Requesters will connect with the legal team to share data and collaborate on matters, cases, and contracts.

### How to access the Client Portal:

- First, to use the client portal, the admin should add you as a client portal user from the system.
- You will receive an email notification inviting you to join the client portal.



The email will include a link to set up your password. Once you have set up your account, you can log in to the client portal.

A password setup form with a dark blue border. It contains two input fields: "Password:\*" and "Password Confirmation:\*". Red arrows point to the asterisks in both labels. Below the second field is a blue "submit" button with a red border.

Lexzur users can easily share the Client Portal URL with collaborators or embed it on their website, enabling them to access the portal effortlessly.

- Both the Client Portal URL and the link embedded in the email will redirect you to the Client Portal Login Page. Sign in using your credentials or click **Sign Up** if you don't have an account.

 **Client Portal**  
by LEXZUR

Welcome to LEXZUR Client Portal

←

← 

Keep me signed in

**Sign In**

Or

 [Sign in using Azure](#) |  [Sign in using OneLogin](#)

Don't have an account? [Sign Up](#)

 **Client Portal**  
by LEXZUR

Welcome to LEXZUR Client Portal





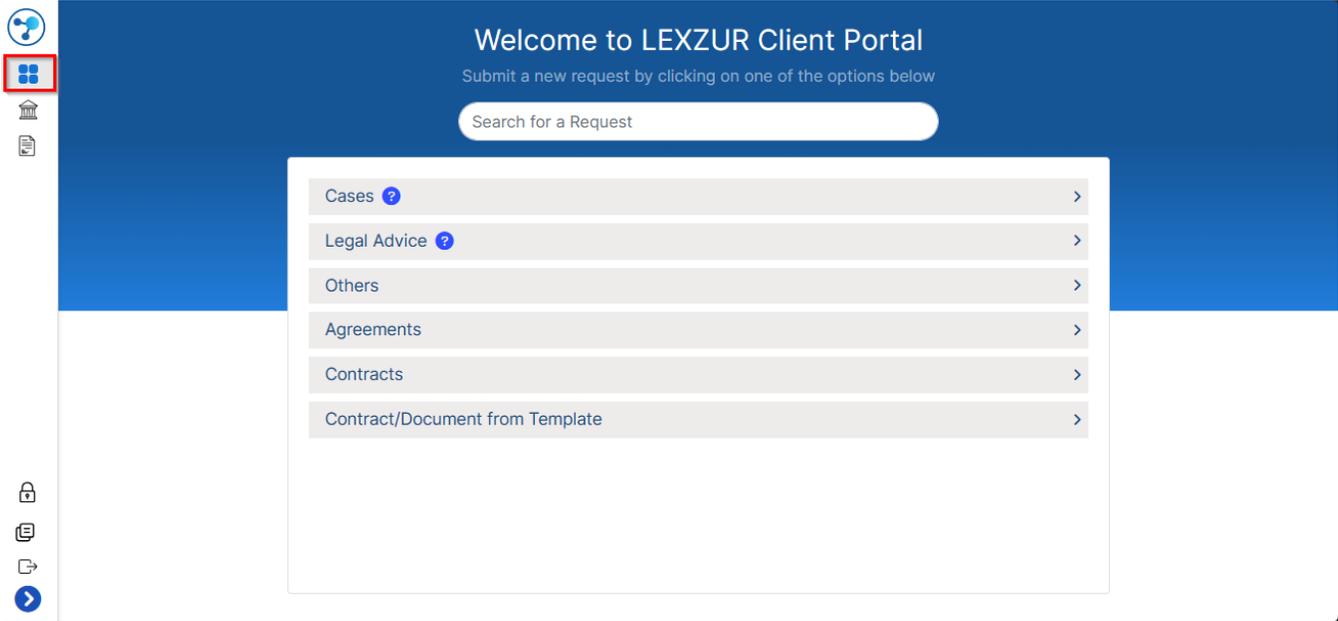
**Sign Up**

Already have an account? [Sign In](#)

### Raise Requests from the Client Portal:

You can now connect to the legal team, raise new requests, and follow up on your requested matters or contracts securely and confidentially.

- From your **Home** page, you can find the list of predefined forms set by the legal team to allow you to request matters, cases, or contracts.
- Search for requests or click on the available categories to view the list of requests organized under each category.

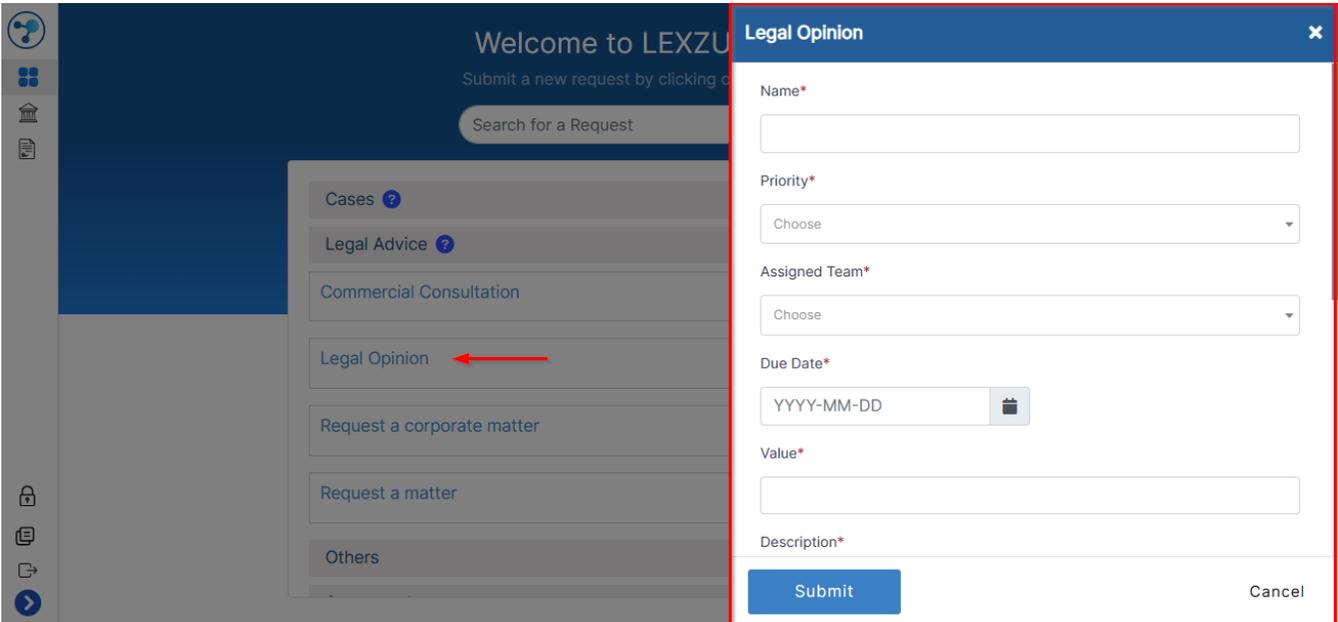


- Choose the suitable request type, for example, "Request a corporate matter" fill in the necessary information, and submit your request once done.



Each request type requires different fields to be filled in, which are determined by the legal team.

- Once the request is submitted, the legal team will receive a notification about the new matter, and they will start working on it.



- You will also receive an email notification including your request details:

## LEXZUR

### Activity Alert

#### Requester Info

**Name** Julia Marven  
**Username** Julia  
**Email** [marvenjulia@gmail.com](mailto:marvenjulia@gmail.com)  
**Department** HR

#### Details

**Hello Julia Marven**  
 Your request has been created.

- You can then view all your requests and follow up on each one from the **Matters/Cases** Page.
- Here, you can search for requests using quick filters such as matter status and practice area. You can also export the list of your requests to Excel and request a new matter on the fly.

**LEXZUR** Matters/ Cases Export to Excel Request a new Matter

Raise a new request

Matters/ Cases

Contracts / Agreement

All Created by me Created by other Litigation only Corporate only Search:

ID	Name	Assignee	Status	Practice Area	Category	Priority	Created By	Requested By
M0000422	Legal Review for Julia		Open	Legal opinion	Matter	high	Julia Marven	Mariana OZ
M0000429	Legal Opinion for BLP		In Progress	Commercial	Matter	critical	Maria Dave	Mariana OZ

As a client, you have access to track some of your request details and receive updates from the legal team.

- Open the request page by clicking on its ID.
- Here, you can follow the workflow status, related people, dates, and important developments and view hearings and attachments from the other tabs.
- Both the client and the legal team can communicate through the Notes tab. You can write your comments in the notes section, attach files, and press "Add note".

The legal team will be notified, and they can see the attachments and add a new note.

**LEXZUR** DNA-428 - Agreement of Sales between BLP and ABC Export ▾

[Raise a new request](#) | [Matters/ Cases](#) | [Contracts / Agreement](#)

[Details](#) | [Attachments](#) | [Approval Center](#) ✓ | [Signature Center](#) ✓ | [Milestones](#)

Status: **Under Signature** | Priority: **Medium**

Type: **Drafting New agreements**

**Notes 2**

- Mariana QZ (Portal User) | 2024-04-03 11:18 | Review the Agreement
- Maria Dave | 2024-04-03 11:20 | Upon reviewing we need to change clauses 2 and 3

Format: **B I U** |

[Add Note](#)

**People**

Requested By: **Mariana QZ**

Watchers:

**Dates**

Requested on: **2023-12-28 16:11**

Last Update: **2023-12-28 16:32**

[Signature](#) | [Stamp](#) | [Change Password](#) | [Help](#)

Similarly, you can also view and follow up on your requested contracts from the **Contracts** page.

**LEXZUR** Contracts / Agreement [Export to Excel](#) | [Request a Contract/Document](#)

[Raise a new request](#) | [Matters/ Cases](#) | [Contracts / Agreement](#)

[All](#) | [Awaiting Approval](#) | [Awaiting My Approval](#) | [Awaiting Signature](#) | [Awaiting My Signature](#)

[Upload Contract/Document for Review](#) | [Draft Contract/Document from Template](#)

#	ID	Name	Status	Type	Reference#	Requested By	Assignee	Last Update
491	DNA-491	Sales Agreement	Filing & Drafting	Drafting New agreements		Manal Zeidan		2024-04-01 10:22:55
457	PUA-457	Purchase Agreement for ABC	Under Negotiation	Purchase Agreement		Manal Zeidan	Maria Dave	2024-03-08 15:04:33
444	DNA-444	NDA	Filing & Drafting	Drafting New agreements		Manal Zeidan		2024-01-24 12:11:07
429	PUA-429	Sales Agreement between BLP and ABC	Filing & Drafting	Purchase Agreement		Manal Zeidan		2024-04-03 11:08:08
428	DNA-428	Agreement of Sales between BLP and ABC	Under Signature	Drafting New agreements		Manal Zeidan		2023-12-28 16:32:02
394	PAA-394	Service Agreement for Albert	Under Approval	Partnership Agreement		Manal Zeidan	Maria Dave	2024-01-02 13:24:06

Showing 1 to 6 of 6 entries

[Previous](#) | [1](#) | [Next](#)

[Signature](#) | [Stamp](#) | [Change Password](#)

- You can request a contract using the questionnaire (draft contract from template), or upload a document for review.
- You can then follow up on your requested contracts each on a separate page, so track details and status, and view or add related attachments.

- You can also have a look at the Approval and Signature Workflow. So you can here view the list of Approvers and signees, as well as the approval and signature statuses.

 Clients do not have collaboration permissions, therefore they cannot approve, reject, or sign contracts.

- Additionally, clients can track contract milestones, and add new milestones as well from the client portal.

 Milestones should be made visible to the Client Portal from the main system.

Raise a new request

Matters/ Cases

Contracts / Agreement

Details Attachments Approval Center ✓ Signature Center ✓ **Milestones**

+ Add Milestone

Finalize Agreement

Completed

Financial Status

Amount: 0 USD  
Serial Number: None  
Attachments: 0 Document(s)  
Deliverables: None

Start Date: None  
Due Date: None

Signature  
Stamp  
Change Password

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

Thank you!