# How to Set Up the Client Portal Defaults

## **Objectives**

- Allow Client Portal features (Enable the client portal, multifactor authentication, allow clients to have controls...)
- Set Client Portal Default Values (Organization name, customize home page messages, Ticket pages names...)

## Steps

Client Portal Settings Configuration may include customization of the portal and setting up some default values.

To do so, go to the Setup & Configuration inside the System Settings, then to the Client Portal Tab:

S Reminuers	internal Statuses	System Settings		
	Manage non-business days	Approval Center Billing and Plan		
Reminder Types		Signature Center		
		Custom Fields Manage Users		
	🚊 Users & Permissions	Applicable Laws Add User		
		Attachment Status Apps Marketplac		
System Maintenance	User Groups	Attachment Type		
ense	Manage Users	Document Generator Templates Folder		
ionae	Import Users from Azure Active Directory	Folder Templates SLA Management		
	User Groups Permissions	DocuSign integration		
		Email Templates		
System Preferences		Linux remplates		
	User Management Reports			
etup & Configuration		Intellectual Property		
tification Scheme	Users Audit Report			
ook & Feel	Login History Report	Intellectual Property Rights		
egrations	User Management Report	IP Classes		
sk & Triggers Automation		IP Subcategories		
ocument Content Search (Full Text Search)		IP Statuses		
Custom Integrations	Limport Data	IP Names		
	O anno an la c	Petition/Opposition Types		
	Companies	Email Templates		

#### Here, you can allow some client Portal features such as:

Settings 7 Setup & Configuration			
Active Directory			٩
Adobe Sign Integration	Property	Default Value	Actions
Advisor Portal	Allow Clients to Add Contacts and Companies through Requests 🕜	Yes	Save
Contract/Document Default Values			
Client Portal	Allow Attachment Controls 🕜	Yes, regardless of Approval Status 👻	Save
Default Values	Allow feature "Client Portal"	Yes	Save
Delegation	Allow Client Portal users to sign up	Yes	Save
DocuSign Integration		Type: Client	
emSigner Integration	Enable Multi-factor Authentication	No	
Exchange Server		NO	Save
External Links	Allow Clients to Add Comments in the Contract	Yes 💌	Save
Hearing Verification Process	Allow Clients to Add Comments in the Matter	Yes *	Save
Incoming Mail	Organization Name		
Document Content Search	organization Name	LEXZUR Client Portal	Save
Maker Checker Control	Default Person Category when creating a client user	Client	Save
Menu External Links			
Notifications			
Outgoing Mail			
Password Policy			

• Allow Clients to Add Contacts and Companies through Requests: Clients requesting a contract will be able to add a new company/person related to the request if no matches are found.

Employment Contract Review	×
Contract Name*	
Employee Name (1)	
Company / Group 🔹	
alberto	Ō
No Matches Found; Click to Add "alberto"	

• Allow Attachment Controls: Client Portal users can have controlled access to attachments. Depending on your preferences, restrictions can be imposed to prevent them from uploading, editing, or deleting attachments. However, they retain the privilege of viewing attachments in a read-only mode. This restriction can be applied universally, regardless of the approval status, or solely before contracts are approved.

LEXZUR Client Portal	M00000337 Legal Opinion for Stephan
Home	
	Details Attachments
m Matters/ Cases	Attachments         Attachments         Image: Search M337         M337         Image: Search M337     <
<ul> <li>A Change Password</li> <li>I Help</li> <li>C → Stephan luiz</li> </ul>	

- Allow feature "Client Portal": This is where you can enable the Client Portal feature from settings.
- Allow Client Portal Users to Sign up: The administrator now has the flexibility to enable or disable the sign-up feature for Client Portal users
  through system preferences, and to specify the type of access granted to users signing up (client, collaborator, or both). During the sign-up
  process, the system will automatically verify the number of licenses available, and if the user is unable to create a new account, they will be
  notified and prompted to contact the administrator for further assistance.
- Enable Multi-factor Authentication
- Allow Clients to Add Comments in the Contract: Restrict client portal users from adding notes on contracts.

Details Attachments Approval Center 🧹 Signature Center 🤗	Milestones		
Status : Under Signature	Priority : Medium	🛳 People	
Type : Drafting New agreements		Requested By :	
		🏝 Watchers :	Start typing
Notes 2	~		
Mariana QZ (Portal User)	2024-04-03 11:18	📸 Dates	
Review the Agreement		<ul> <li>Requested on:</li> <li>Last Update</li> </ul>	
Maria Dave	2024-04-03 11:20		
Upon reviewing we need to change clauses 2 and 3			
Format -   B I U   ==  >   X   E   0			

- Allow Clients to Add Comments in the Matter: Restrict client portal users from adding notes on matters.
  Allow Clients to Edit Milestones: You can also restrict client portal users from editing contract milestones.

Other features include setting the Default Person Category when creating a user, showing or hiding the approval and signature history from the portal, and so on...

### You can also set Client Portal Default values and names from this page:

Settings / Setup & Configuration			
Active Directory	Organization Name	LEXZUR Client Portal	Save
Adobe Sign Integration			
Advisor Portal	Default Person Category when creating a client user	Client	Save
Contract/Document Default Values	Allow Clients to Edit Milestones	Yes v	Save
Client Portal	Matters Page Name	Matters/ Cases	Save
Default Values			
Delegation	Password Lockout	10	Save
DocuSign Integration	Homepage Welcome Message	Welcome to LEXZUR Client	Save
emSigner Integration			
Exchange Server	Matter Containers Page name	Matter Containers	Save
External Links	Contract/Document Creation Page name		Save
Hearing Verification Process	Constant/Document/Document		_
Incoming Mail	Contract/Document Page name	Contracts / Agreement	Save
Document Content Search	Home Page Name	Raise a new request	Save
Maker Checker Control	Lamanasa Walaama Dramat		-
Menu External Links			
Notifications			

Rename your Client Portal (Organization name), Set your welcome message, rename matter, contracts, and the home page name, etc...

Settings / Setup & Configuration				
Active Directory	Organization Name	LEXZUR Client Portal	Save	*
Adobe Sign Integration			_	
Advisor Portal	Default Person Category when creating a client user	Client	Save	
Contract/Document Default Values	Allow Clients to Edit Milestones	Yes v	Save	
Client Portal	Matters Page Name	Matters/ Cases	Save	
Default Values				
Delegation	Password Lockout	10	Save	I
DocuSign Integration	Homepage Welcome Message	Welcome to LEXZUR Client	Save	
emSigner Integration			_	
	Matter Containers Page name			
Exchange Server	Matter Containers Page name	Matter Containers	Save	
Exchange Server External Links	violitei Colliaines riege lialne Contract/Document Creation Page name	Matter Containers	Save	
	Contract/Document Creation Page name		Save	1
External Links		Matter Containers Contracts / Agreement		
External Links Hearing Verification Process	Contract/Document Creation Page name		Save	
External Links Hearing Verification Process Incoming Mail	Contract/Document Creation Page name Contract/Document Page name	Contracts / Agreement	Save Save	•
External Links Hearing Verification Process Incoming Mail Document Content Search	Contract/Document Creation Page name Contract/Document Page name Home Page Name	Contracts / Agreement	Save Save	Ŧ

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

Thank you!