

How to Set Up the Client Portal Defaults

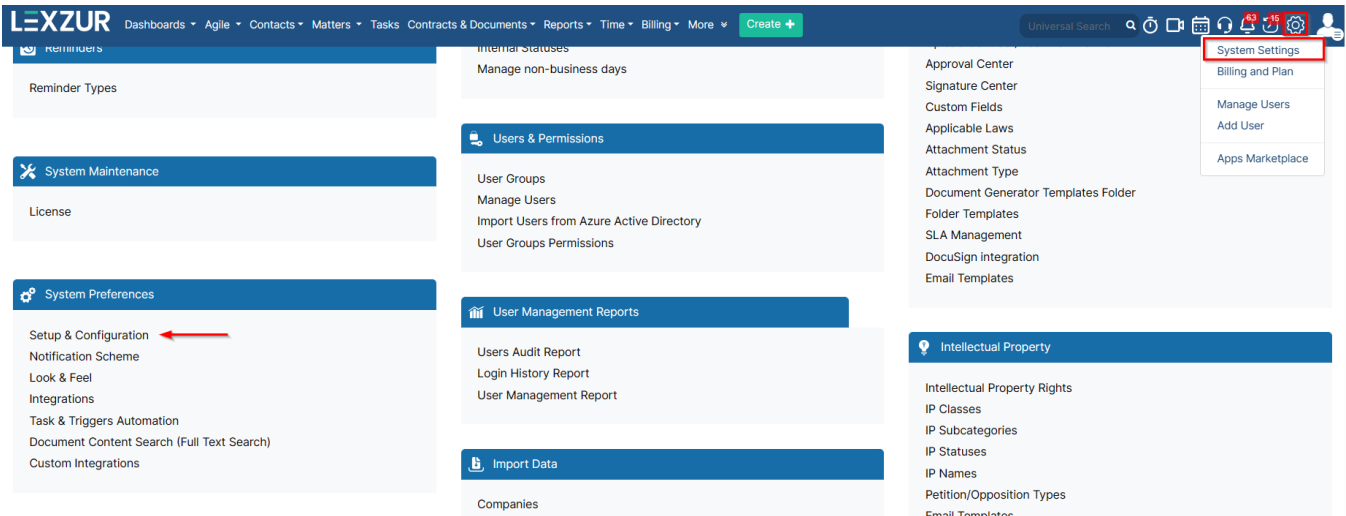
Objectives

- 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...)

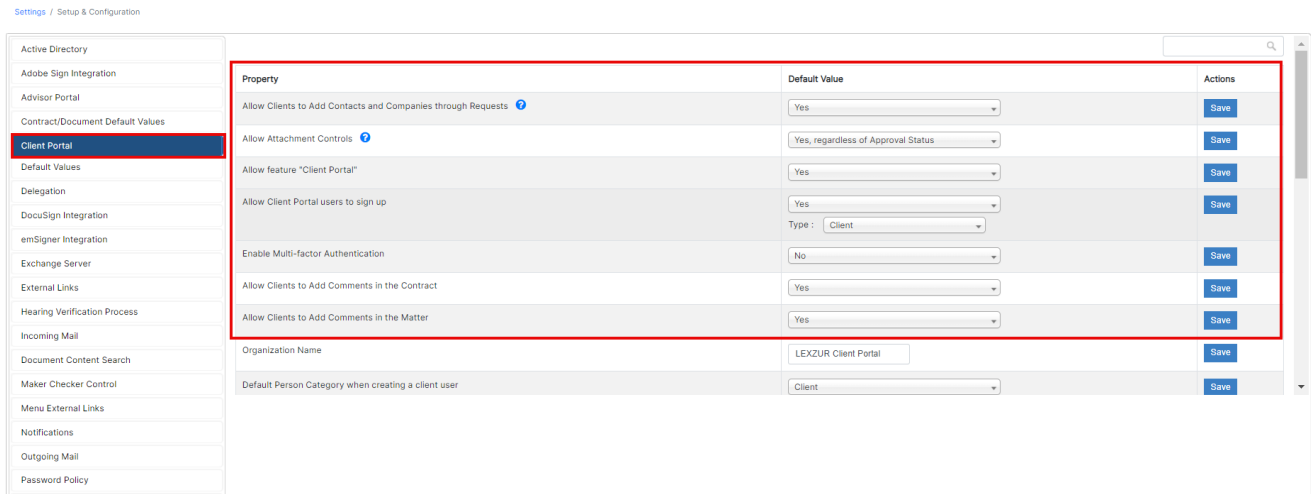
Steps

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:



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



- **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

🔍

🗑️

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

Home

Matters/ Cases

Contracts / Agreement

Change Password

Help

Stephan Iuliz

M00000337 Legal Opinion for Stephan

Details

Attachments

Attachments

+ New

▼

📁 Upload

▼

Search M337

M337

🔄

🗪

	Name	Type	Status	Keywords	File Size	Added On	Added By	Modified By
	<div>📄</div> <div>matter updates.docx</div>				31.3 kB	2023-12-03 12:42...	Stephan Iuliz	Stephan Iuliz

- 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.

LEXZUR

Raise a new request

Matters/ Cases

Contracts / Agreement

Signature

Stamp

Change Password

Help

DNA-428 - Agreement of Sales between BLP and ABC

Details

Attachments

Approval Center

Signature Center

Milestones

Export

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 :

Start typing

Dates

Requested on:

2023-12-28 16:11

Last Update

2023-12-28 16:32

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

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

Thank you!