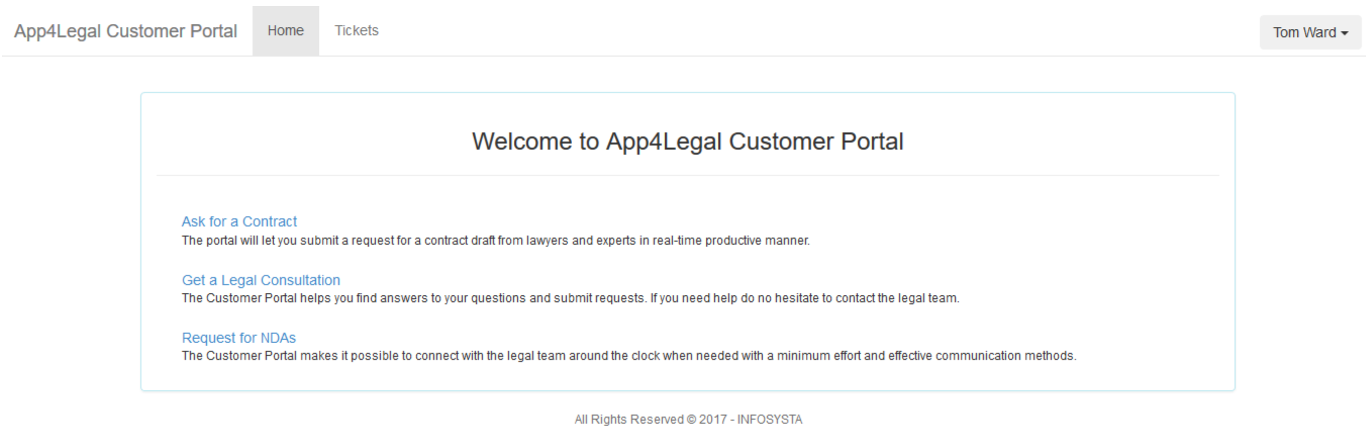
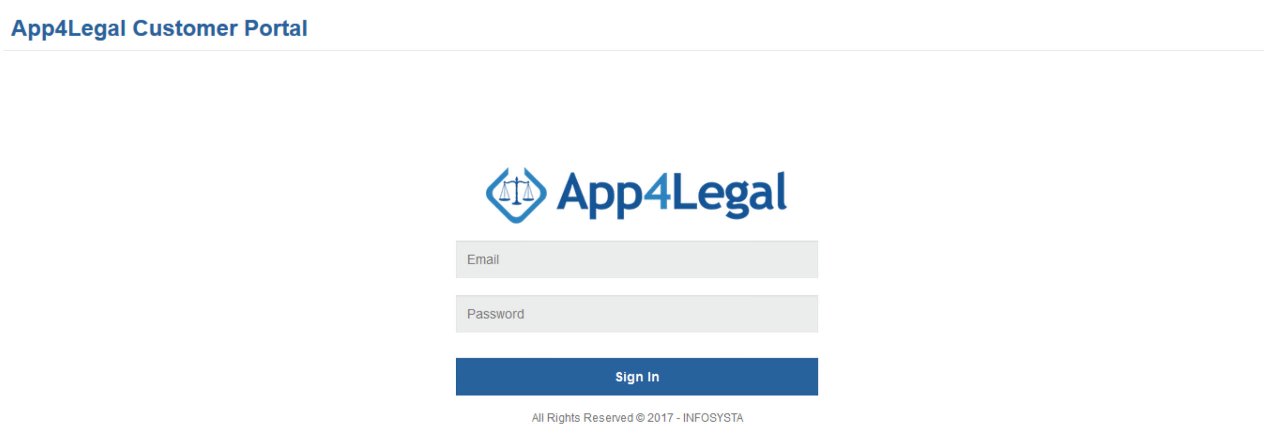
Welcome to App4Legal Customer Portal Documentation Center



How to access it

The link to the Customer Portal interface should be provided by the administrator. The login and password is provided by your administrator as well unless there is a connection with the Active Directory, hence Customers will use the same password of the internal mailing system.



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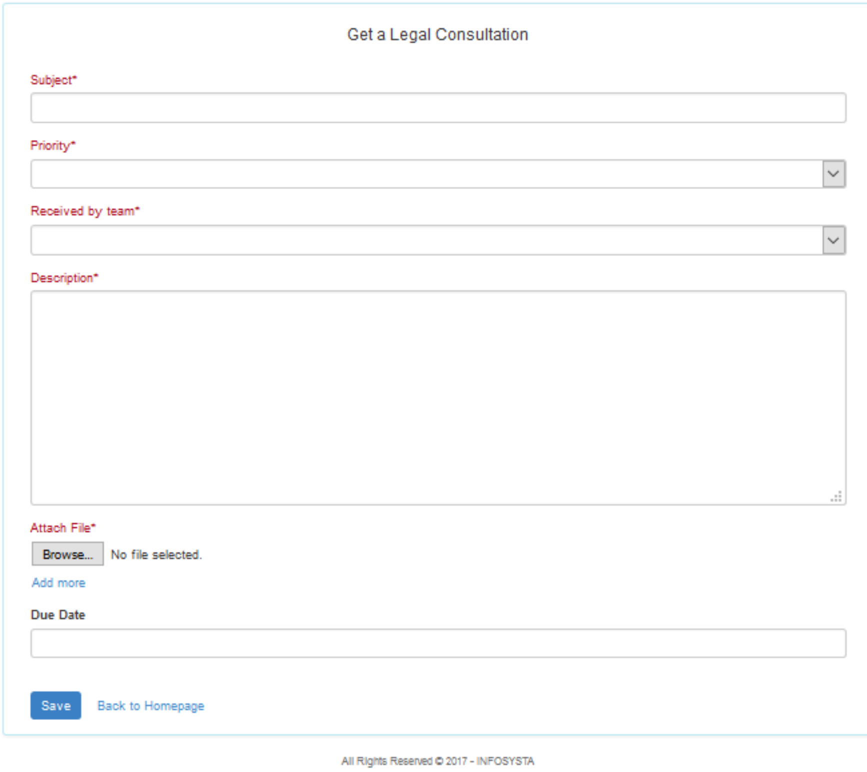
Add a Ticket

The Customer Portal interface gives a number of predefined Request Types that are configured by your Administrator and designed by the legal team. Customer are allowed to access a Request Type and submit a Request to the legal team after filling in the fields of the form.

For instance, the Customer clicks on "Get a Legal Consultation" link, the below form appears. The mandatory fields are the ones in red.



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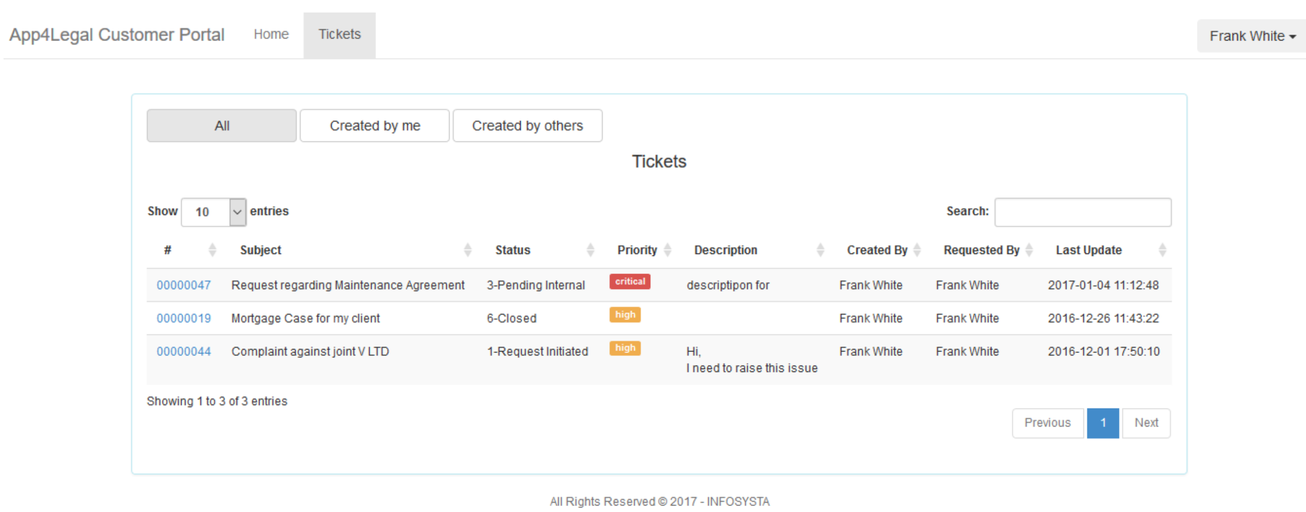
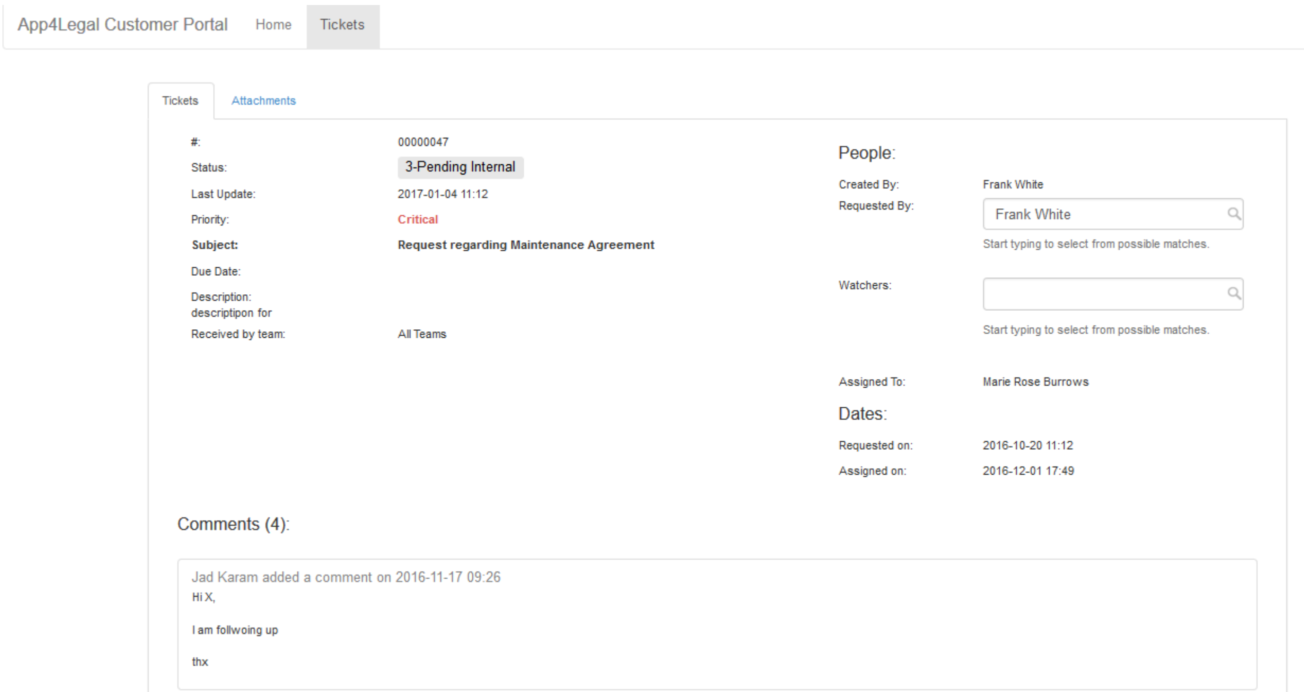
Manage Tickets

A Customer is allowed to track the Tickets that are created by him/her using the "Tickets" or created by others.

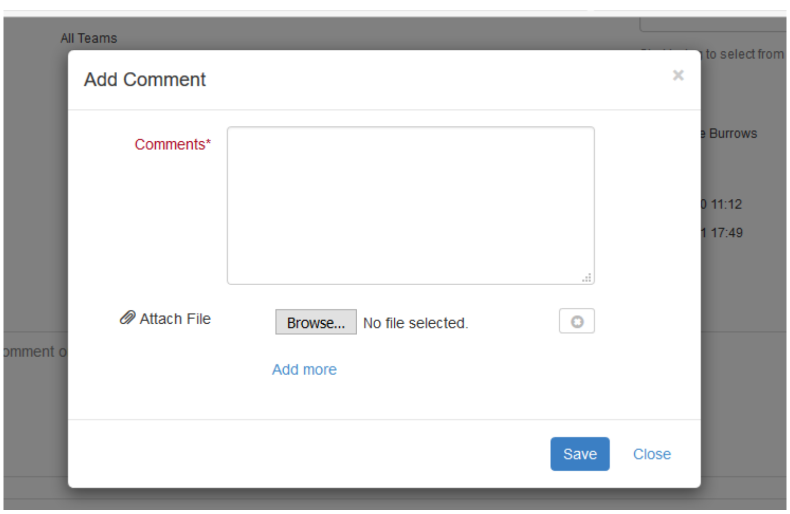


The edit form of the Ticket allows the Customer to track recent updates on the Ticket and monitor the progress. For tickets requested by the customer, the available actions are:

- Manage the requester.
- Assign watcher(s) who belong to the same company as the customer.
- Apply actions that are allowed by the administrator (see next section).



Customers who are requesters or watchers can check the Comments history and add Comments with attachments via the Add Comment button:



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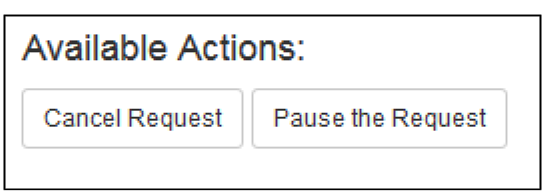
Actions in a Ticket

On the top of the Ticket, there are available actions. These actions are configured by the administrator depending on the business needs. Hence the actions may or may not appear depending on the administrator.

The actions are clickable buttons that change the Status of the Case accordingly for example:



Note that the information inserted in a Ticket can't be changed. However, when the Legal Matter is received by the Legal team, information can be edited from App4Legal then.

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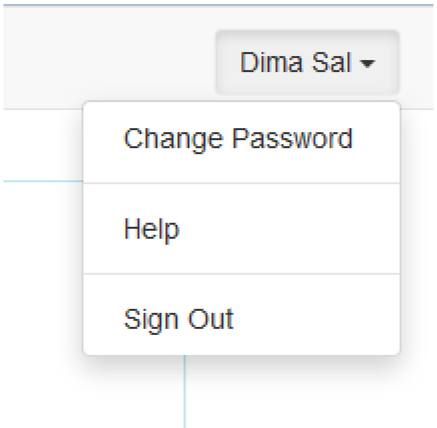
Customer Additional Actions

From the top right of the screen, there is a drop-down list with actions for the Customer profile:



- Change Password: If the Customer is not imported from Active Directory, there will an option to change password of the profile.
- Help: It will redirect the Customer to the Documentation Center of App4Legal Customer Portal.
- Sign out

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