STAFF GUIDE TO THE DIBCASE CLIENT PORTAL

2021

DIBCASE
LEGAL CASE MANAGEMENT

Welcome to the Dibcase client portal...

The Dibcase Client Portal is an easy-to-use, online platform that provides your clients with 24/7 access to important case information and secure communications with you and your firm.

Benefits of the Dibcase client portal

24/7 access to case information

The Dibcase client portal is a client-attorney communication app that enables clients to work with their attorney from anywhere.

AVAILABLE 24/7 ON PC, MAC, TABLETS, AND SMART PHONES

Clients can check the status of their cases, view announcements, add notes, and more from anywhere at anytime. This will eliminate unnecessary back-and-forth communication.

COMPLETELY INTEGRATED WITH DIBCASE

There are no 3rd party integrations or expensive addons to use the portal. No manual entry is needed to the portal to keeps clients up to date. You simply update Dibcase as usual and it seamlessly flows into the portal.

DOCUMENT SCANNING AND UPLOADING

Documents can be uploaded from other apps (e.g. Mail, Dropbox), or from a device's camera roll. You can share documents with clients by simply attaching them to notes or manually uploading them.

LOG CLIENT COMMUNICATION EFFICIENTLY

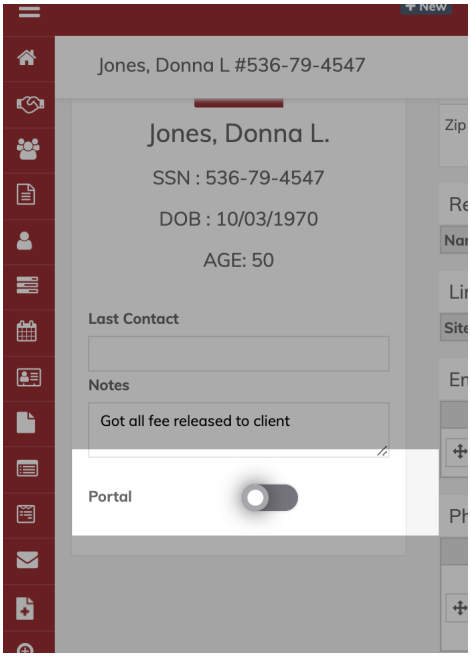
You are in control of what is shared with clients. Clients can respond via the notes process which is automatically logged and can be assigned a billable time value.

Activating the Dibcase portal

Step 1:

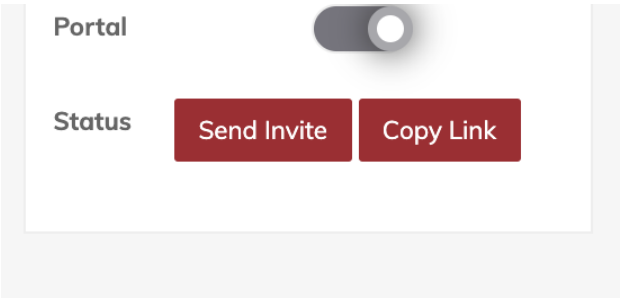
Navigate to the client edit page and enable the portal

Note: The portal can be toggled on or off for any client.



Step 2:

Click the Send Invite button to send an email invitation for the client to create a portal account.



Alternatively, you can copy the signup link and create the account for the client or send it via SMS.

Note: Email account required

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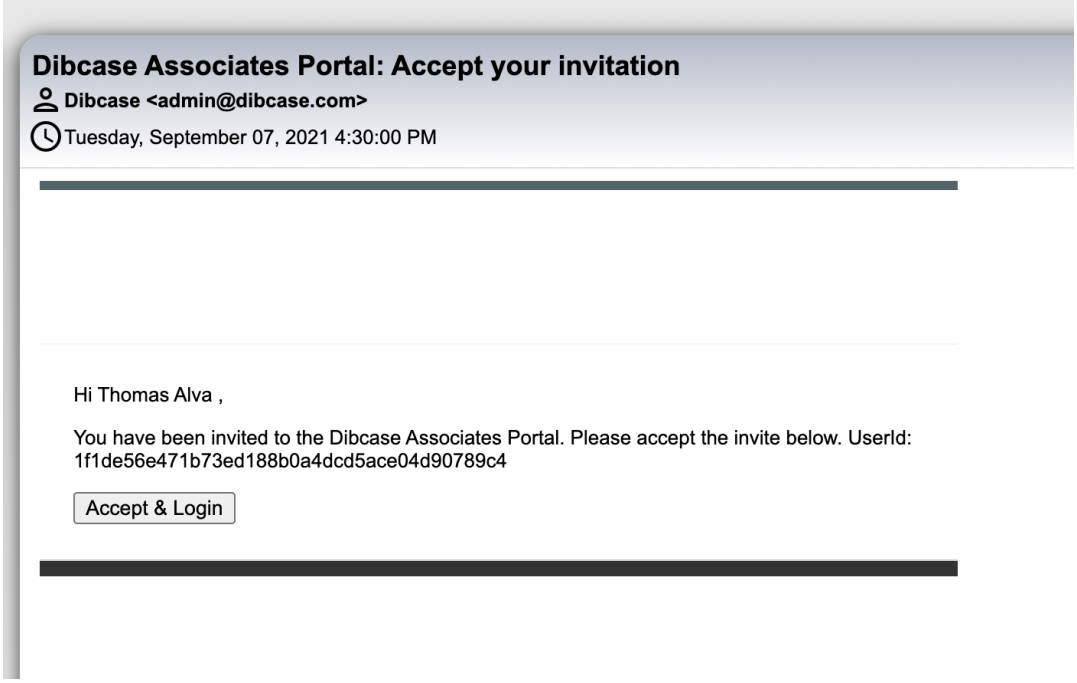
Sample invitation email (below)



Once your client has activated their account, they can access their Client Portal any time by navigating to https://app.dibcase.com/#/client-portal/login

Note: Activation emails will be sent from admin@dibcase.com. If you have sent your client an activation email and they cannot locate it in their inbox, please be sure to have them check their Spam filter.

Creating announcements

In lieu of email, admin employees can create and share announcements that will appear in all portals. You can share images and other multimedia files or links.

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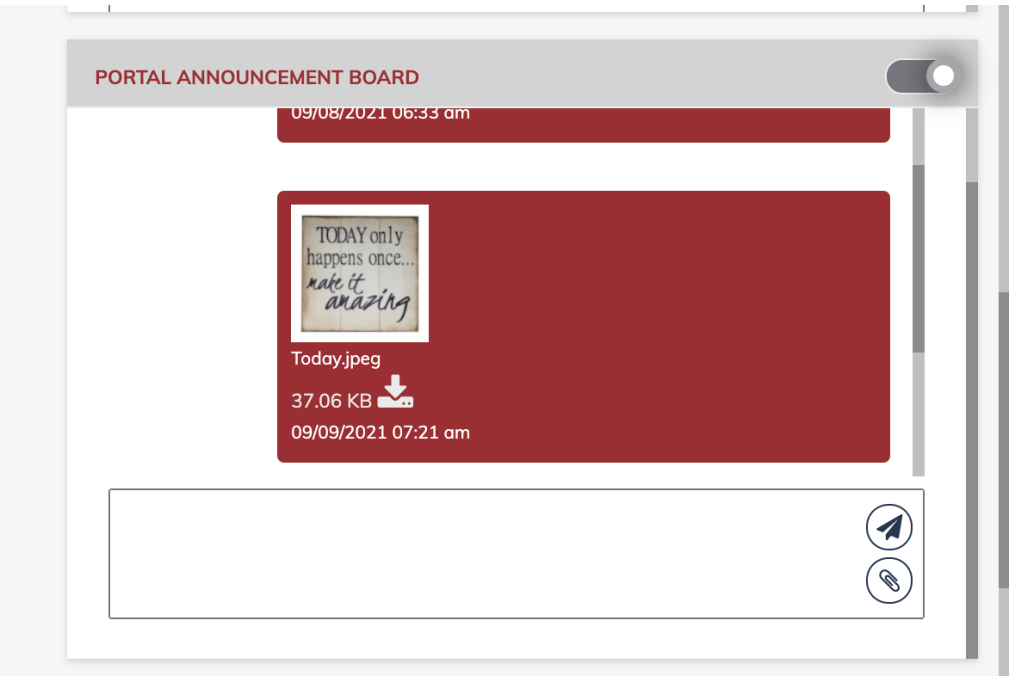
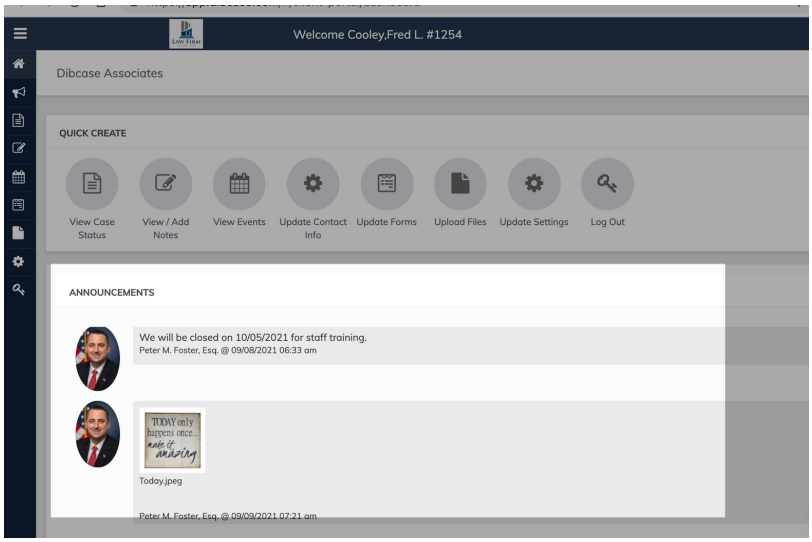
Dibcase dashboard "Portal Announcement Board" panel (below)



Clients will be able to see any announcements that your firm makes when they login to their portal.

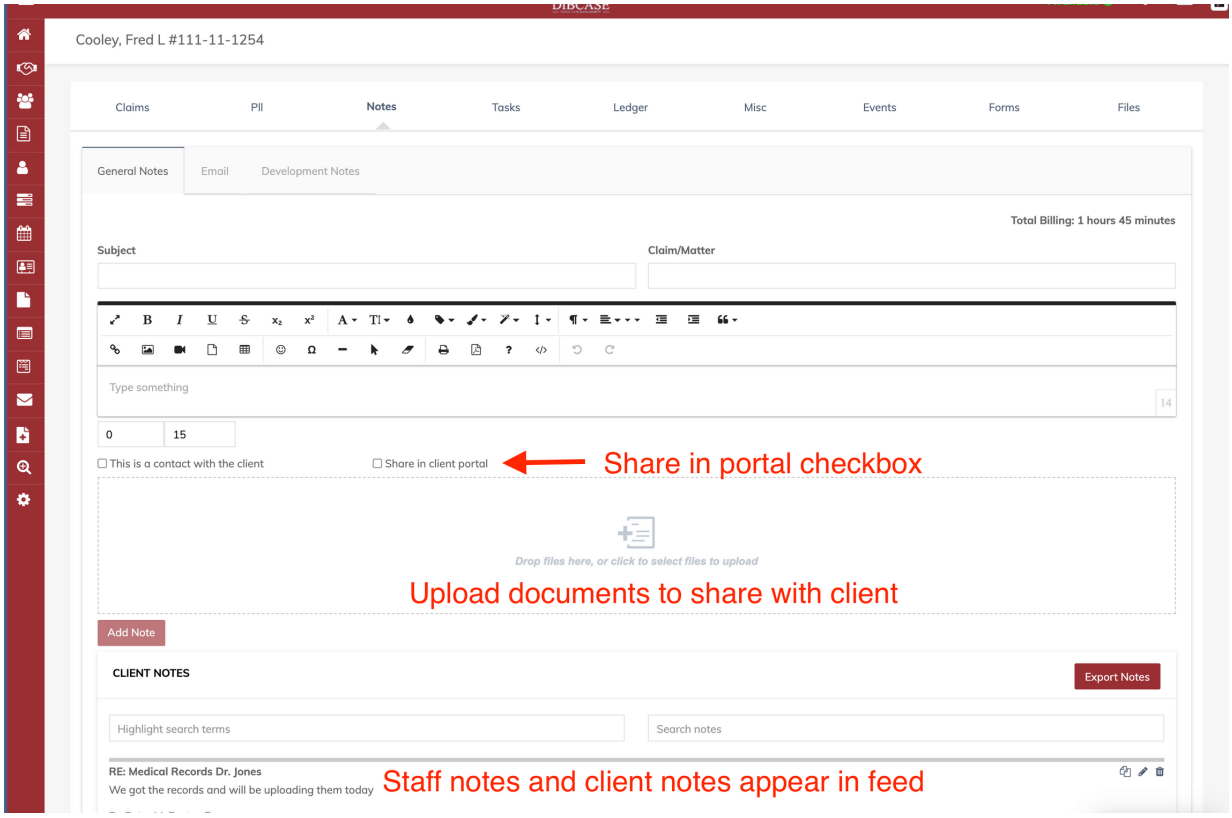
Portal view of announcements (below)



Sharing notes

Sharing notes is a key feature of the Dibcase client portal. During the normal course of business such as making calls, processing mail, checking statuses, case review etc., you can optionally share those notes with the clients in their portal. You can also go back retroactively and edit notes and check the "Share in portal" checkbox. You don't have to worry about inadvertently sharing notes as the default option is to not share in the portal.

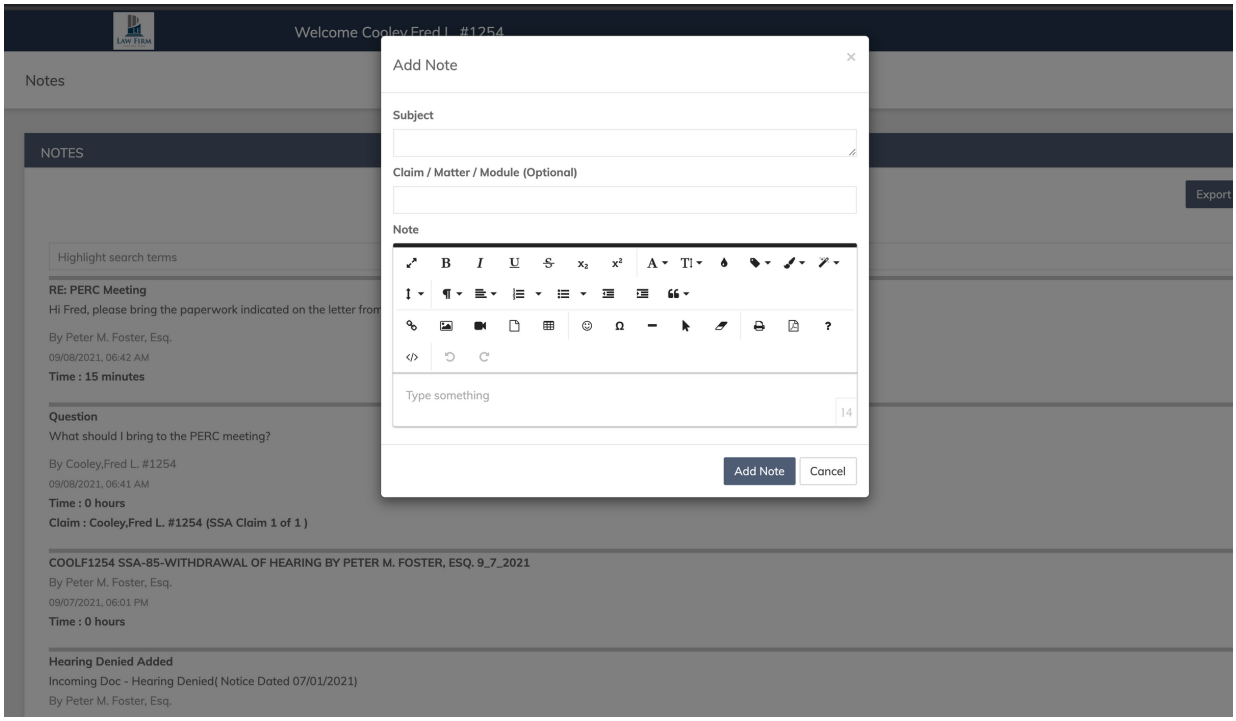
Client edit page notes tab (below)



How clients share notes

Instead of sending an email or calling your office, clients can send secure messages from the Client Portal.

To do so, they click on the “Add Note” button and it will open the "Add Note" Window (pictured below)



Notifications

When a client creates and adds a note to their portal, the note will appear on the dashboard "Recent Activities" feed and on the client edit page.

Tip: You can export all the day's recent activities from the dashboard and filter for client notes and respond accordingly.

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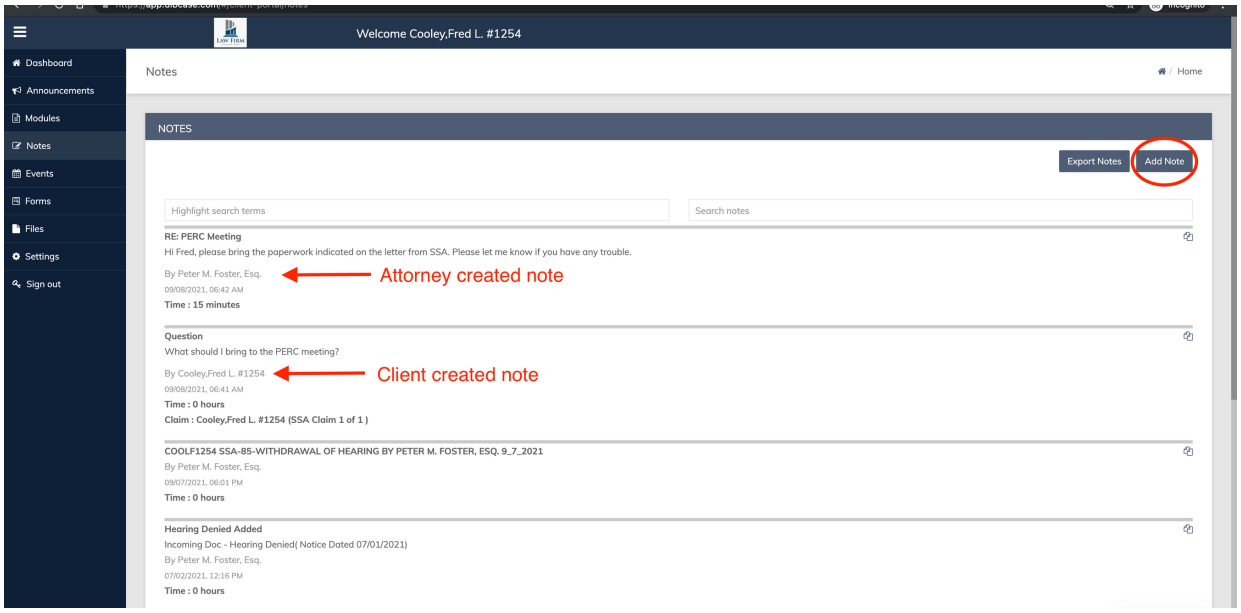
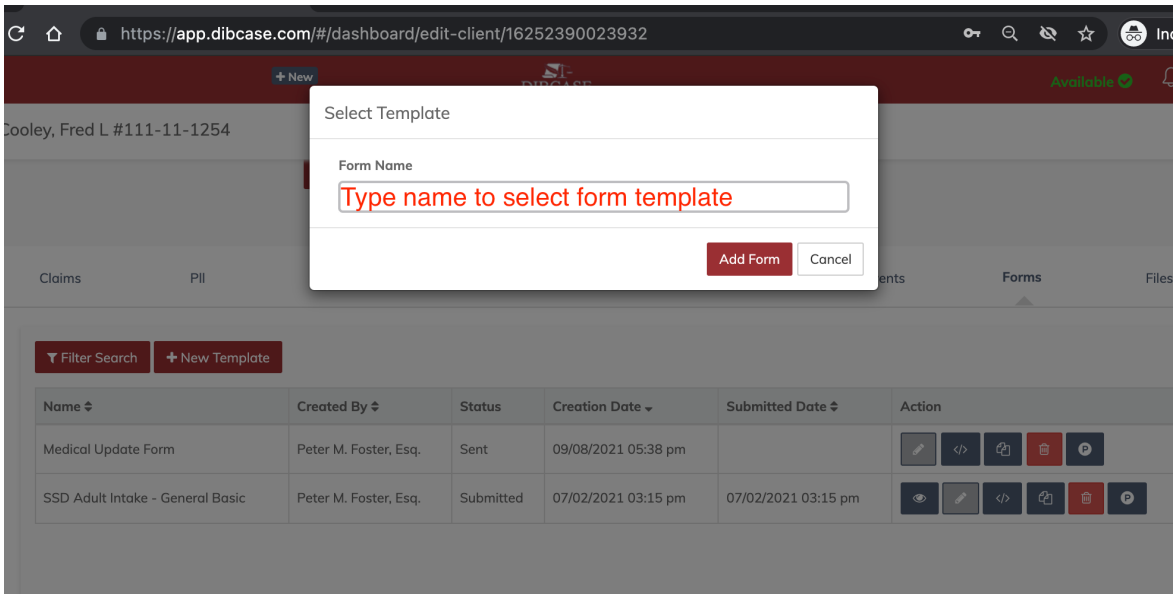
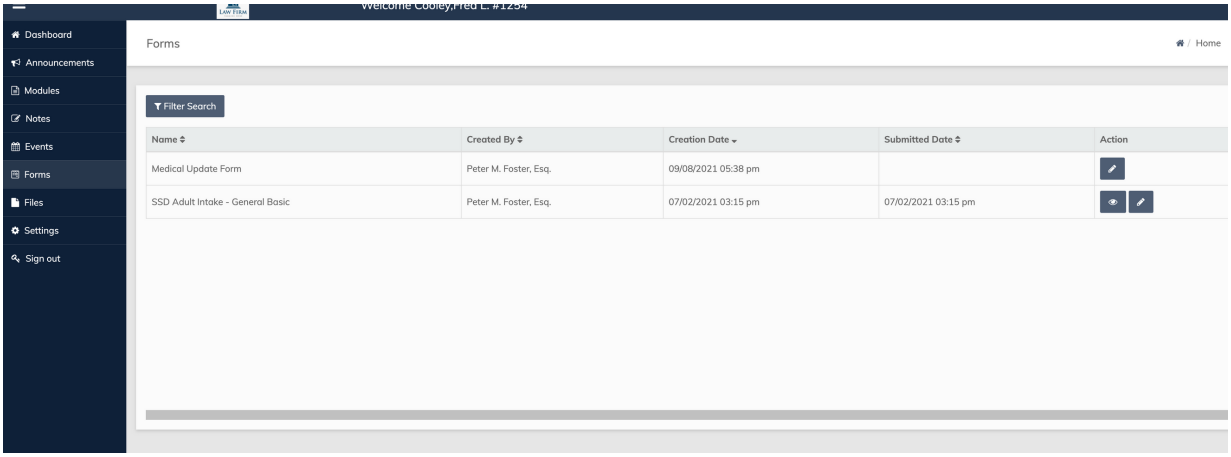


You can retroactively share notes by editing them and checking the "Share in portal" option.

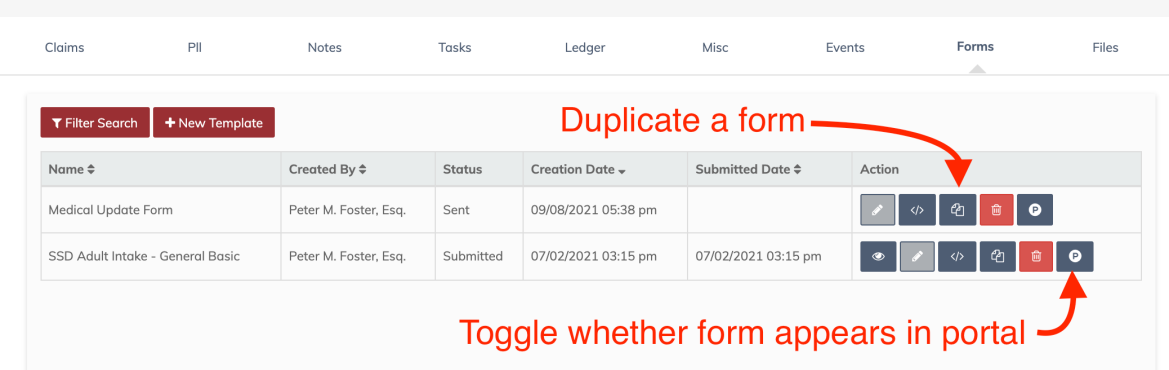
Sharing forms





Once a form template has been added to the client, you can email, sms, or complete the form yourself. Forms can be partially completed and submitted to be completed at a later time. To stop further editing of a form, simply toggle off the form. Once toggled off, the completed form will not appear in the portal.

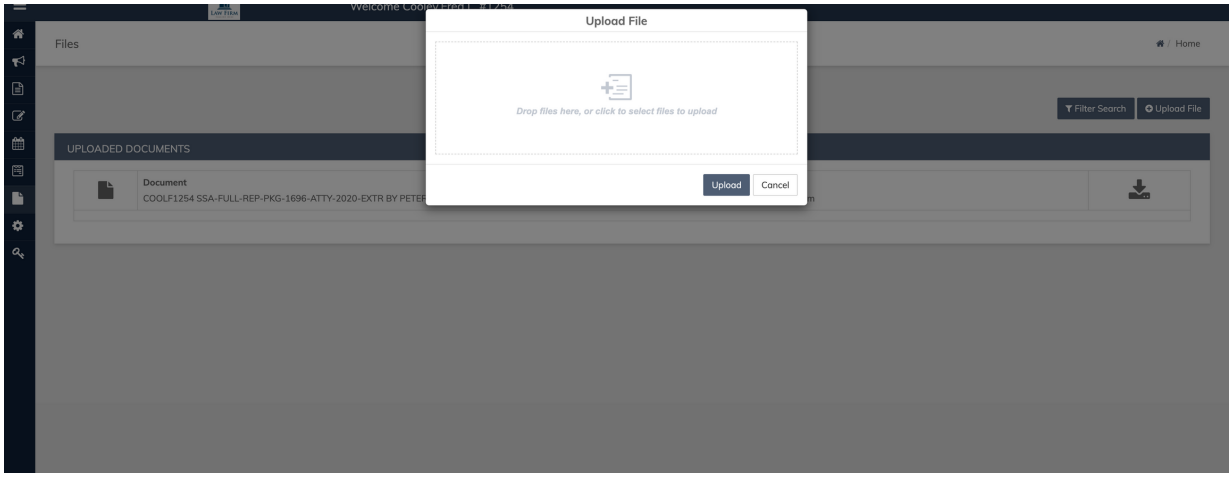
The client edit page forms tab (below)



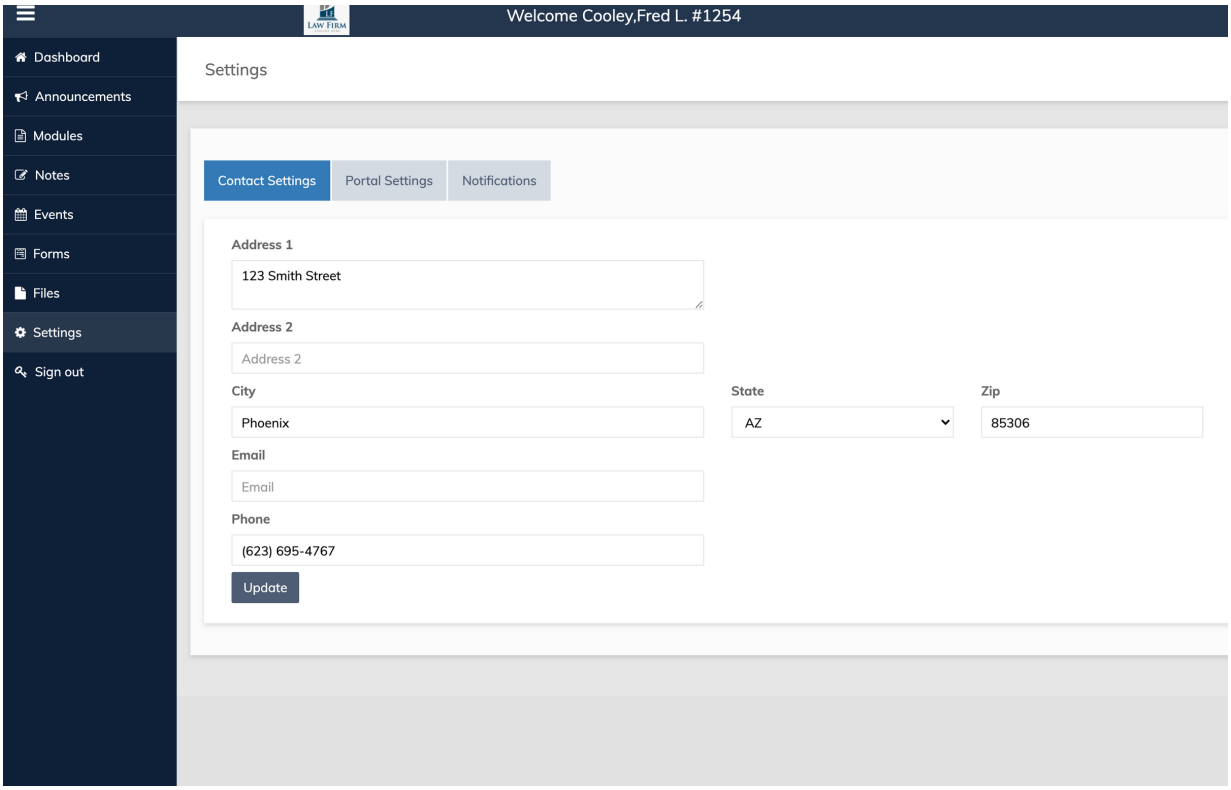
Sharing and uploading documents

Instead of using email or traditional mail to send documents, you can upload documents to share into the Client Portal. This way, your clients can have instant, secure access to the necessary documents they need to work on your case.

To do so, click on the “Upload Document” button in your Client Portal. You will be taken to the Add Document Window (pictured below):



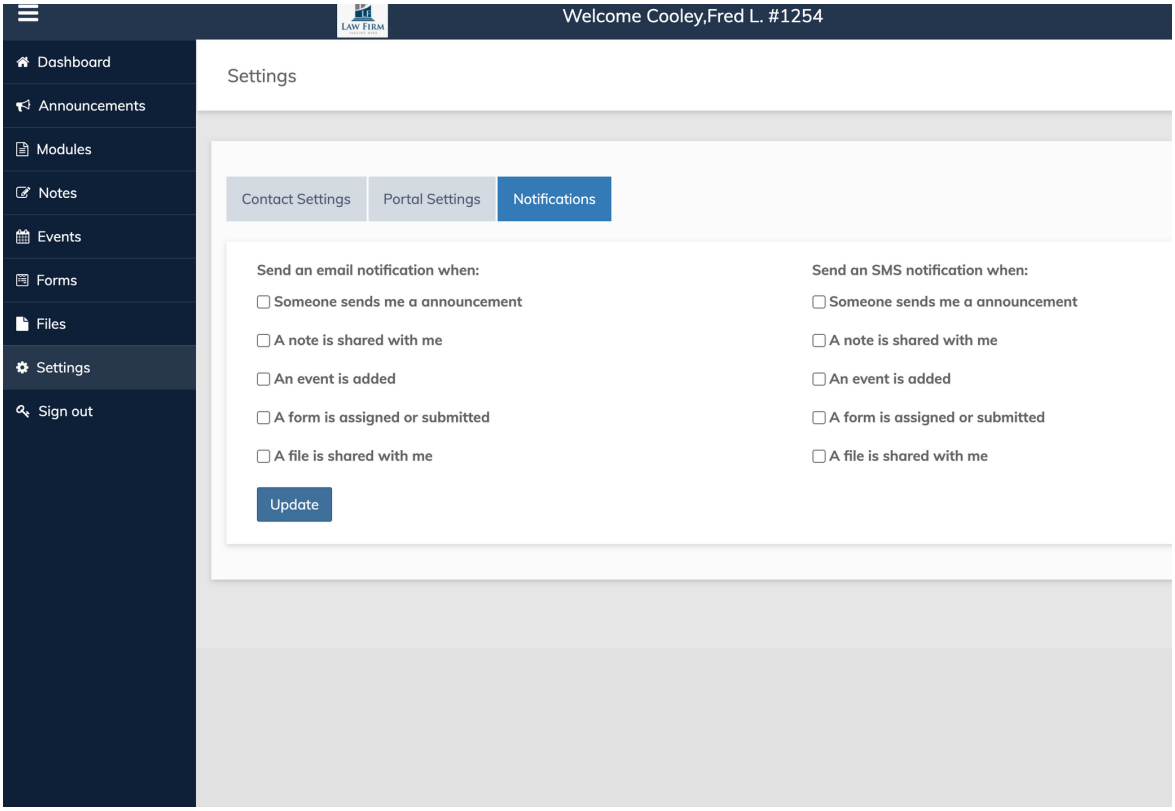
Client contact information



Clients have the ability to change their address, add a phone number, or add an email address. When a client adds new email addresses and phone numbers, they will appear in Dibcase as new values.

Setting portal preferences

Clients have the ability to toggle on or off specifically what changes in their portal they will be notified about.



Change portal passwords and other settings

If your client forgets their username or password, you can log in to their page through the client edit page to verify their username or reset their password manually.

Click the "Open" button and navigate to the "Settings" page to edit the client password and confirm user name.