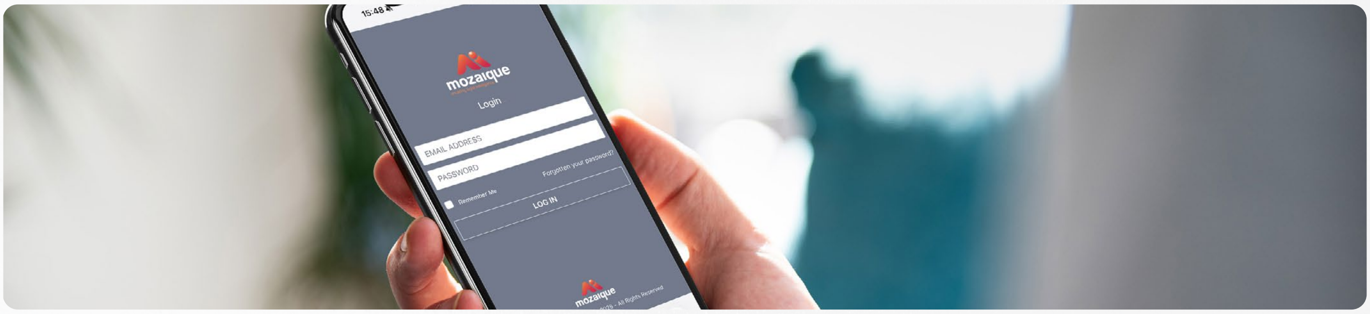
# Client Portal

Providing real-time access for your clients to view their case progress, complete onboarding and make secure payments.

PRODUCT BROCHURE

Product Overview

# A secure, accessible, and customisable client portal that brings everything together in one place.




Share real-time case updates, capture data through web forms, manage to-do lists and milestones, securely exchange documents, and take payments online all in one powerful legal portal.

Clients can track matter progress, make secure payments, share documents securely, and work their way through an actionable to-do list, such as signing T&C's, digital onboarding & paying money on account. The result is fewer emails and phone calls chasing updates, clearer communication for clients, and more time for your team to focus on legal work.

Features

## Security is paramount.

### Zero Data Storage

Always up to date, without duplicating data.The portal retrieves information securely from your PCMS in real time via secure APIs. No data is stored or duplicated, ensuring accuracy, security, and complete confidence that clients are always seeing the latest information.

### Bank Information

Share your firm's bank details securely, without email. Display your firm's bank account information directly within the client portal, ensuring clients always see verified payment details while reducing the risk of email interception or fraud.

### Safer Document Sharing

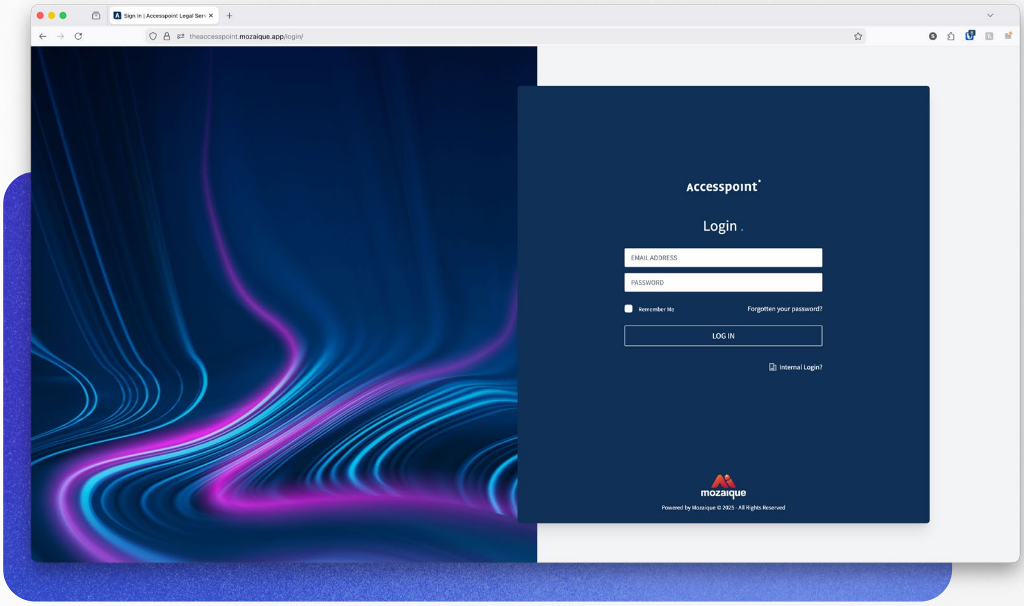
Protect your firm with automatic security checks on uploads. All documents uploaded to the portal are scanned and validated using security controls such as file extension and MIME type checking, helping prevent malicious or unsupported files from entering your systems.

### Compliance-focused

Maintain full visibility and accountability across every interaction. All activity within the portal is automatically tracked in a detailed audit log, including document uploads, downloads, and client actions, giving you a complete, time-stamped record for compliance, reporting, and peace of mind.

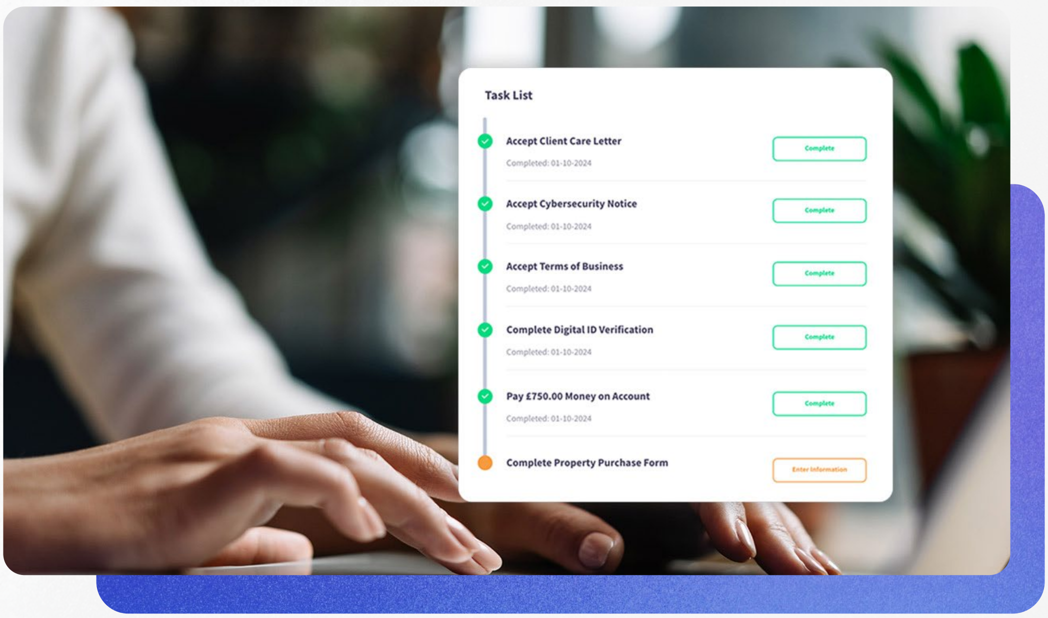
## Enjoy Bespoke Branding

Make the portal feel like a natural extension of your firm. Apply your own branding, logos, colours, imagery, T&C's, email content and contact information so clients experience a consistent, professional service throughout their journey.



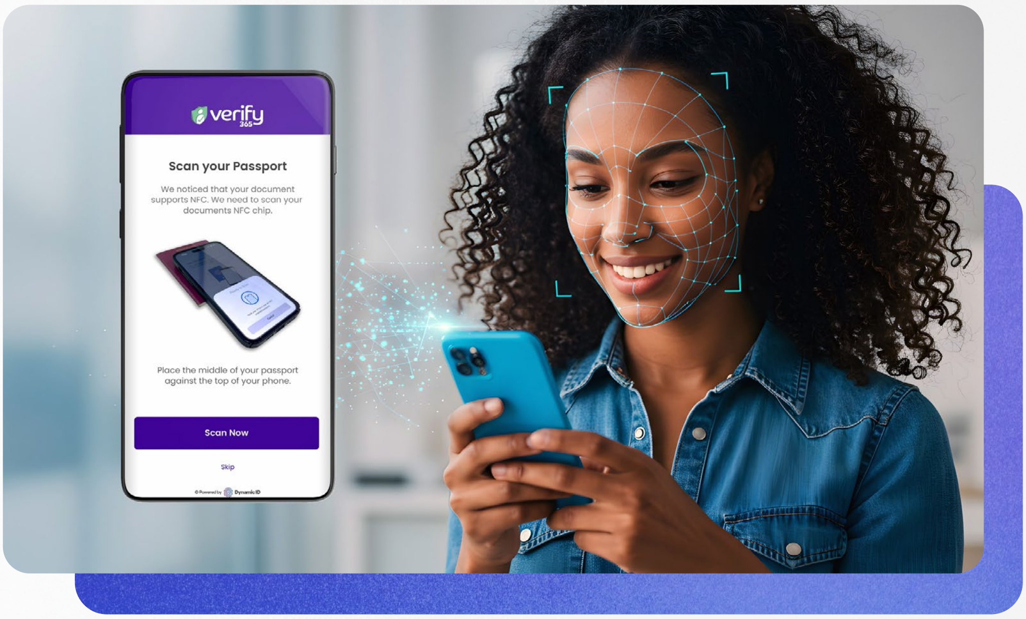

## Actionable, Case Specific, Client To-do List

Give clients clear, actionable next steps. Clients can see exactly what they need to do and when, such as paying money on account, completing a webform, approving a document or providing ID verification. This helps cases move forward without unnecessary chasing or follow-ups from your team.



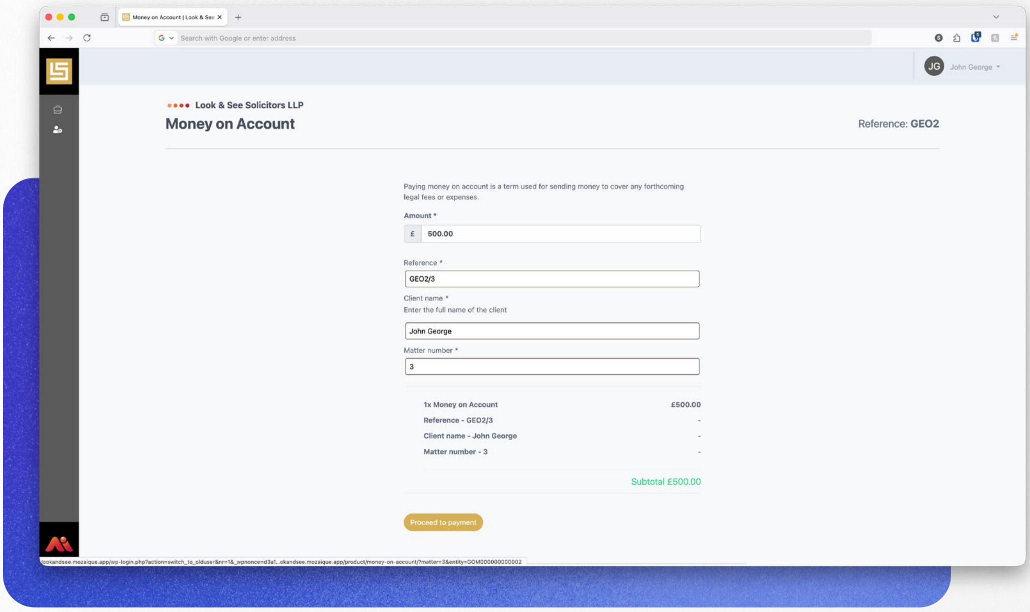
## Digital Onboarding (AML/ID Verification)

Clients can complete AML and ID verification directly through the portal using our integrated Verify365 solution. Automatic prompts guide clients through the process, while verification status updates in real time, reducing delays, manual checks, and compliance-related admin for your team.



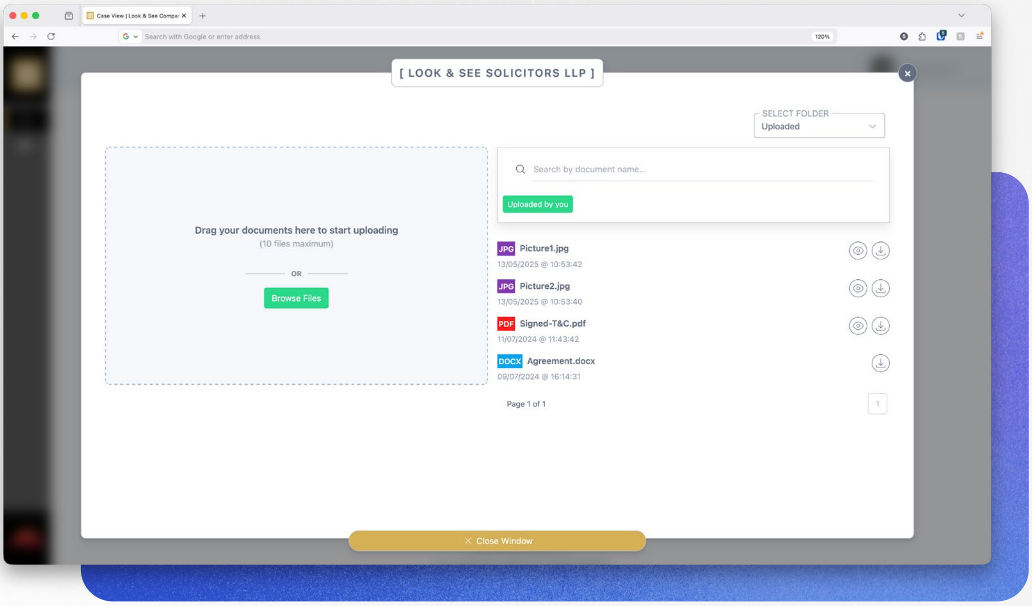

## Be Reassured with Secure Payments

Take payments with confidence. With multiple integrations with payment vendors such as Stripe, WorldPay, Tyl, Barclays and Lloyds, Clients can make secure payments directly through the portal using a trusted payment system, giving peace of mind to both you and your clients.



## Document Sharing

Exchange documents securely without email attachments. Your team can upload documents directly to the portal for your clients to view or download at any time. Your Clients can also securely upload their own documents, with automatic notifications sent to your team when new files are added, keeping everything organised, auditable, and in one place.




## PCMS/CRM Integration

Seamlessly connected to your Practice & Case Management System (PCMS). The Mozaique Client Portal integrates directly with your PCMS using secure APIs, allowing case information, milestones, tasks, and updates to be displayed in real time. Data is retrieved securely as needed and is not duplicated or stored within the portal, ensuring accuracy, consistency, and reduced data risk. his tight integration means fee earners continue working in their PCMS as normal, while clients benefit from up-to-date visibility without additional admin or manual updates.

## Mobile Device Friendly

Our client portal is completely accessible on any device: mobile, tablet and computer. This means your clients can access matter progress, view their to-do lists and milestones, and even pay securely via their mobile or tablet device.

## Multiple Clients

Safely share case information with more than one client. Where a case involves multiple parties, such as a property transaction, each client can have their own secure login. You control what each client can view and access within the portal.

## Enterprise, Corporate Clients

Corporate clients with multiple cases can quickly filter and search cases within the portal, making it easy to stay on top of ongoing work. Case data can also be exported to Excel, supporting internal reporting, finance, and compliance needs.

## Case Information

Give clients clear visibility of the essentials Clients can view key case details such as the case reference and the legal team working on their matter, helping build trust and reduce basic status queries

## Active and Archived Cases

Easily view both current and completed cases. Clients can clearly see active cases alongside archived cases, making it simple to track ongoing work while keeping past cases accessible for reference.

## Client Notes / Comments

Share helpful updates and context directly within the case. Fee earners can add notes to a matter that clients can view in the portal, providing clarity, guidance, and reassurance without the need for additional emails or calls.

## Avoid Admin Errors with Pre-populated Client Details

Our portal provides clients with pre-populated billing details, with the information synced securely from your firm's PCMS database.*

*We do not hold any of this data. All client data is pulled directly from your PCMS.

## Case Milestone Clarity

Keep clients informed automatically as their matter progresses. Milestones notify clients when key stages are reached, without calls or emails. For case-specific workflows, milestones can be pre-configured. When a step is completed in your PCMS, the milestone updates automatically.

## Website Integration

Connect the client portal seamlessly to your existing website. Add a "Login" button to your website so clients can securely access the portal in just one click, creating a smooth, familiar experience without disrupting your current site.