SurveyJuror Firm Portal

Client Onboarding Handbook

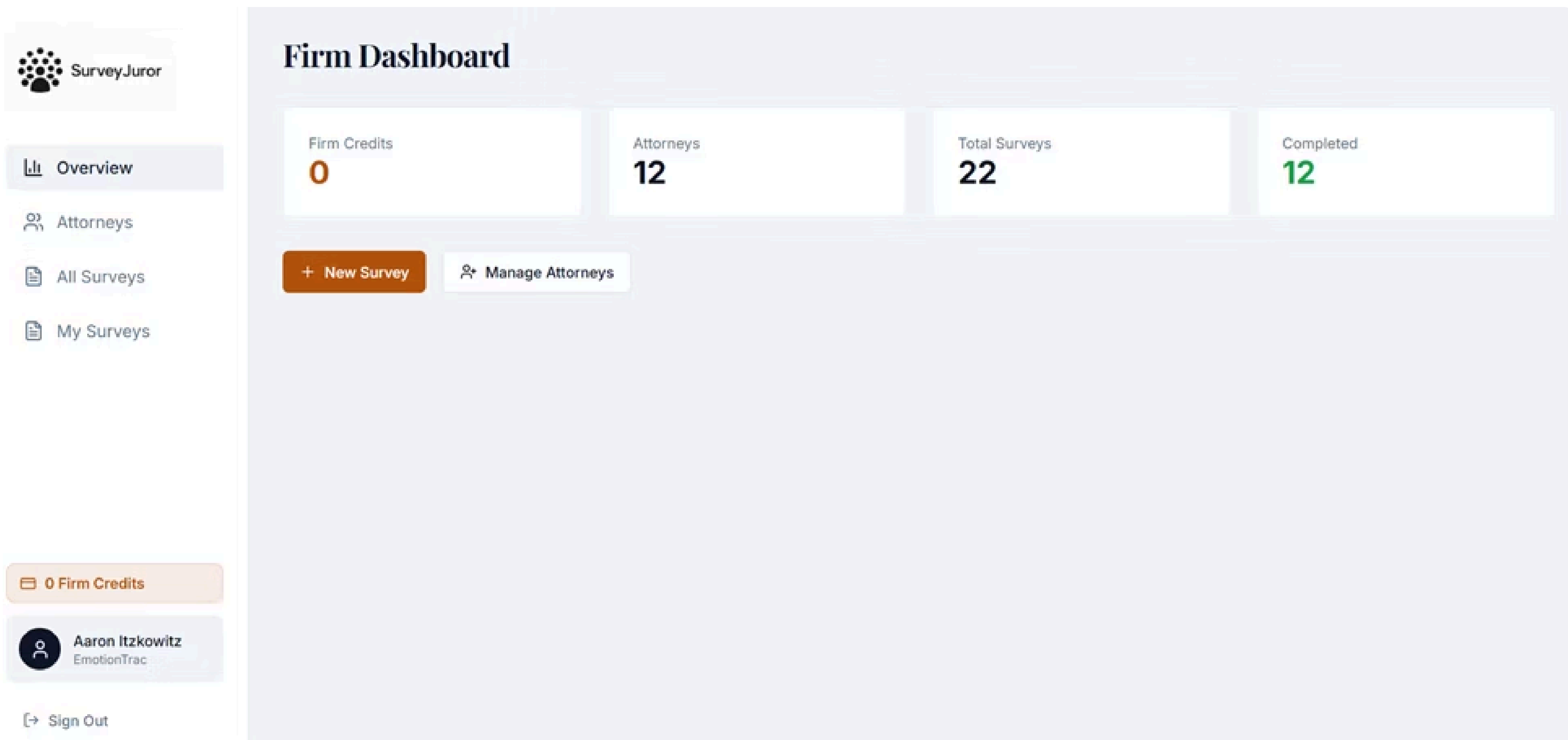
Welcome to the SurveyJuror Firm Portal — your centralized hub for managing attorneys, tracking surveys, and reviewing results across your entire practice. This guide walks you through each section of the platform so your team can get up and running quickly and confidently.

1. **Firm Dashboard**
   Your activity snapshot
2. **Attorneys**
   Manage your team
3. **Invite Users**
   Add new staff
4. **All Surveys**
   Firm-wide oversight
5. **My Surveys**
   Your personal surveys

SECTION 1

Firm Dashboard

The **Firm Dashboard** is your command center — the first screen you see after signing in. It provides an at-a-glance summary of your firm's activity, including credit balance, active attorneys, and survey counts. From here, administrators can take immediate action without navigating away.



1

Snapshot Metrics

View your firm's current **Firm Credits**, total **Attorneys**, active **Surveys**, and **Completed** surveys at a glance in the top metric tiles.

2

New Survey

Click the **+ New Survey** button to create a fresh survey directly from the dashboard — no need to navigate elsewhere to get started.

3

Manage Attorneys

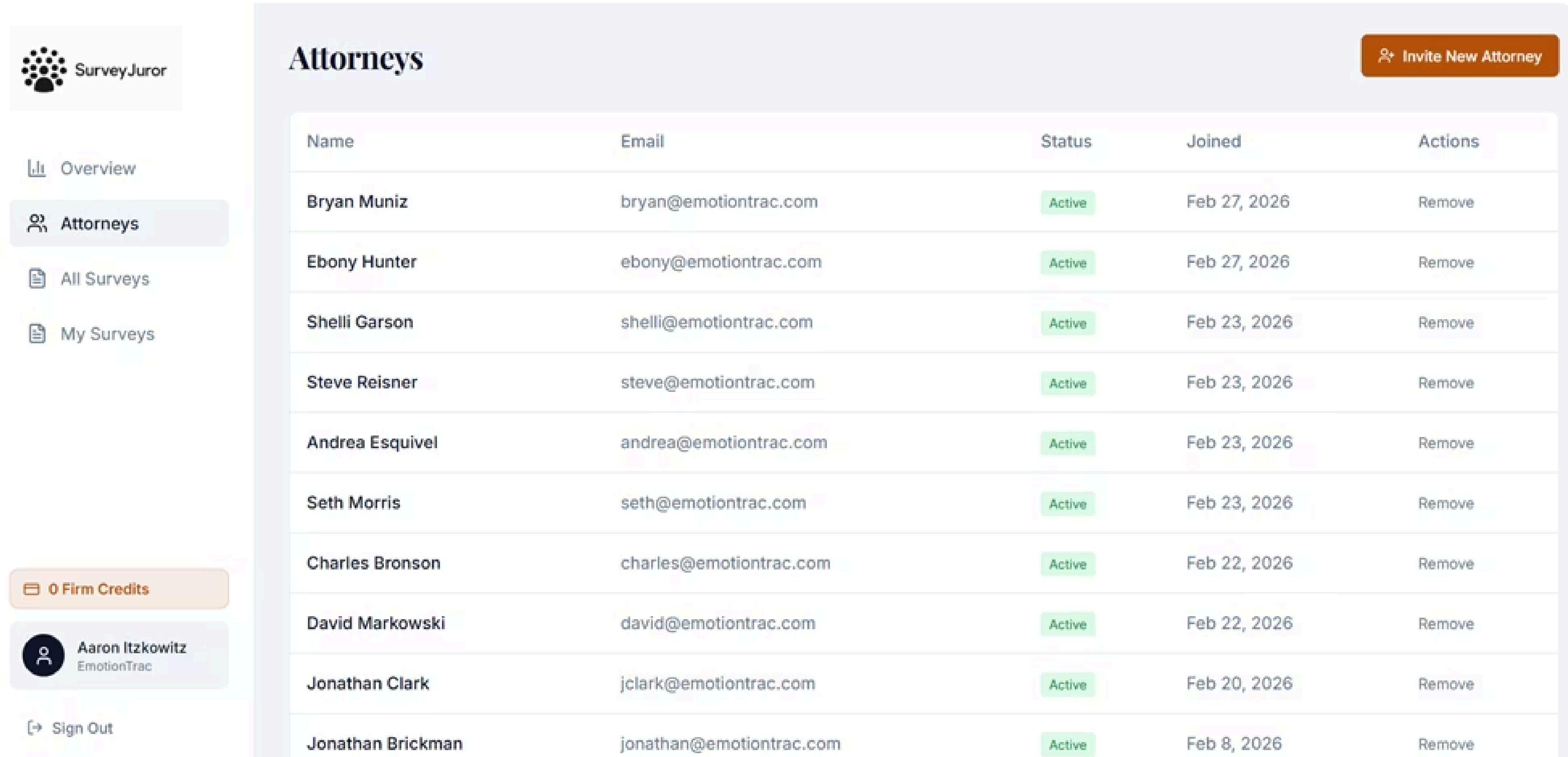
Use the **Manage Attorneys** button to quickly jump to your firm's user list, where you can add or remove staff members with ease.

Your **Firm Credits** balance is always visible in the bottom-left sidebar. Credits are required to send surveys. Contact your Salesperson to purchase additional credits.

SECTION 2

Attorneys Page

The **Attorneys** page gives firm administrators a complete view of all active staff associated with the firm's SurveyJuror account. From here, you can monitor user status, see when each staff member joined, and take direct action to manage account access including adding new users or removing departing staff.



Name	Email	Status	Joined	Actions
Bryan Muniz	bryan@emotiontrac.com	Active	Feb 27, 2026	Remove
Ebony Hunter	ebony@emotiontrac.com	Active	Feb 27, 2026	Remove
Shelli Garson	shelli@emotiontrac.com	Active	Feb 23, 2026	Remove
Steve Reisner	steve@emotiontrac.com	Active	Feb 23, 2026	Remove
Andrea Esquivel	andrea@emotiontrac.com	Active	Feb 23, 2026	Remove
Seth Morris	seth@emotiontrac.com	Active	Feb 23, 2026	Remove
Charles Bronson	charles@emotiontrac.com	Active	Feb 22, 2026	Remove
David Markowski	david@emotiontrac.com	Active	Feb 22, 2026	Remove
Jonathan Clark	jclark@emotiontrac.com	Active	Feb 20, 2026	Remove
Jonathan Brickman	jonathan@emotiontrac.com	Active	Feb 8, 2026	Remove

What You Can See

- ① **Name** — Full name of each attorney or staff member on the account
- ② **Email** — The verified email address linked to their login
- ③ **Status** — Active/Inactive badge showing current account state
- ④ **Joined** — The date the user accepted their invitation

Actions Available

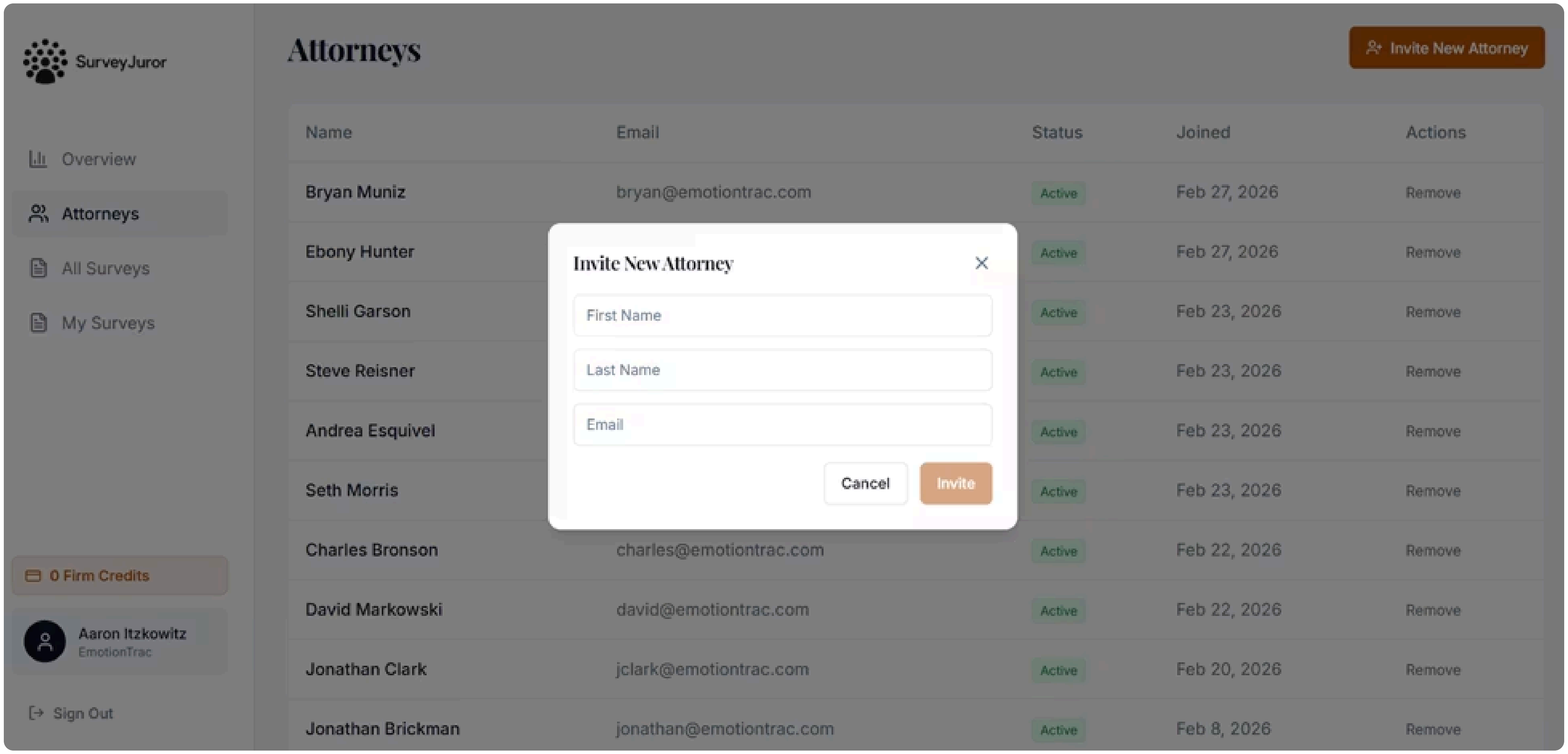
- ⑤ **Invite New Attorney** — Orange button in the top-right corner to send a new invitation
- ⑥ **Remove** — Instantly revoke a user's access to the firm account from the Actions column

Only firm administrators have permission to invite or remove attorneys. Regular attorney accounts will not see these controls.

SECTION 3

Inviting a New Attorney

Adding a new team member to your firm account is fast and straightforward. Clicking **Invite New Attorney** from the Attorneys page opens a simple modal form. Once submitted, the new user will receive an email invitation to set up their account and join your firm.



1 Click "Invite New Attorney"

From the Attorneys page, click the orange **Invite New Attorney** button in the upper-right corner. The invitation modal will appear over the existing list.

2 Enter User Details

Fill in the new user's **First Name**, **Last Name**, and **Email** address in the form fields provided. All three fields are required before sending.

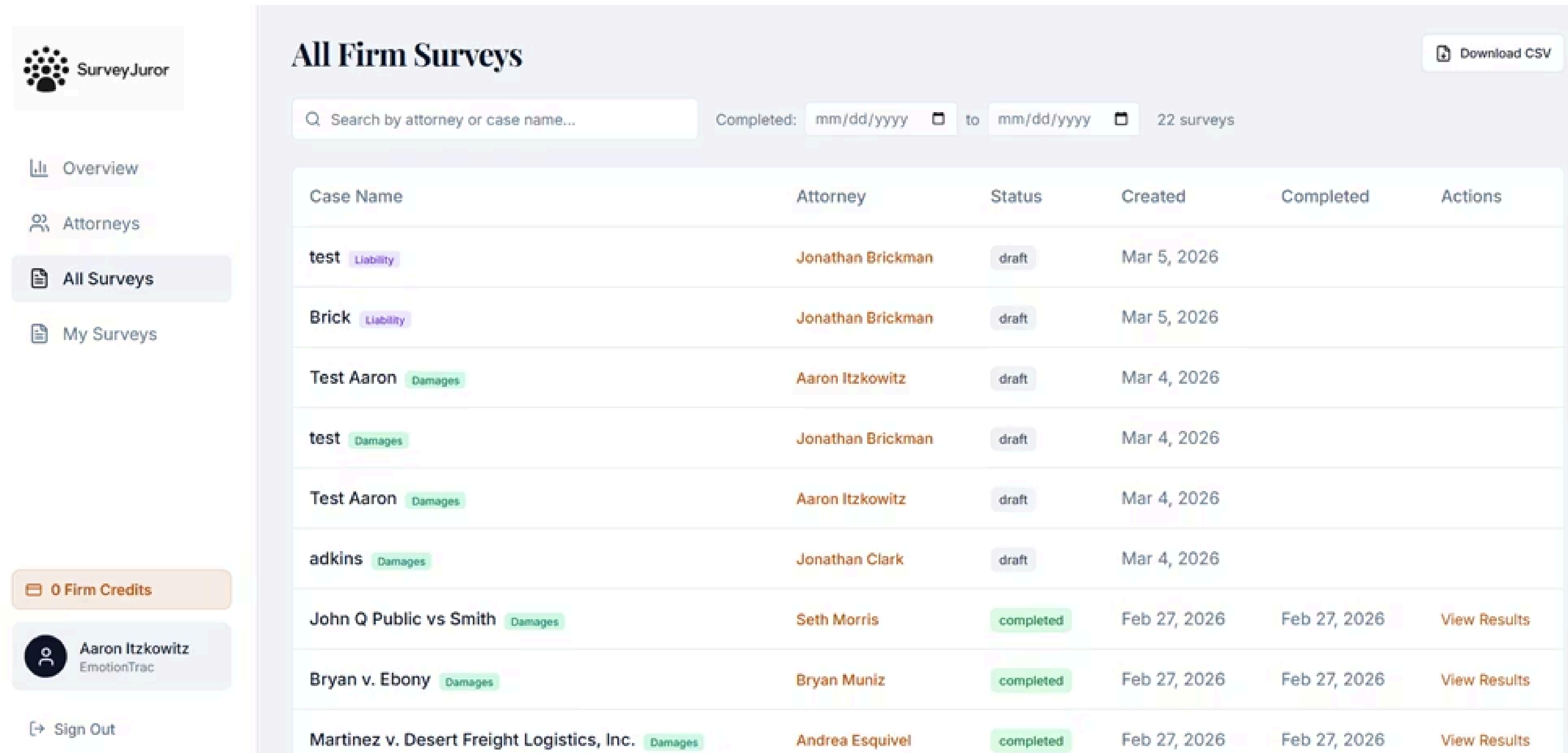
3 Send the Invitation

Click the **Invite** button to dispatch the email invitation. The new attorney will appear in your list once they accept and complete their account setup.

SECTION 4

All Firm Surveys

The **All Surveys** page gives firm administrators complete visibility into every survey published by any attorney on the account. This is your firm-wide audit view, ideal for tracking case progress, reviewing completed results, and exporting data for reporting purposes.



① Search & Filter

Search by attorney or case name. Filter by completion date range to narrow results quickly.

② Survey List

View Case Name, assigned Attorney, Status (draft/completed), Created date, and Completed date in a clean table.

③ View Results

For completed surveys, click **View Results** in the Actions column to access full juror response data.

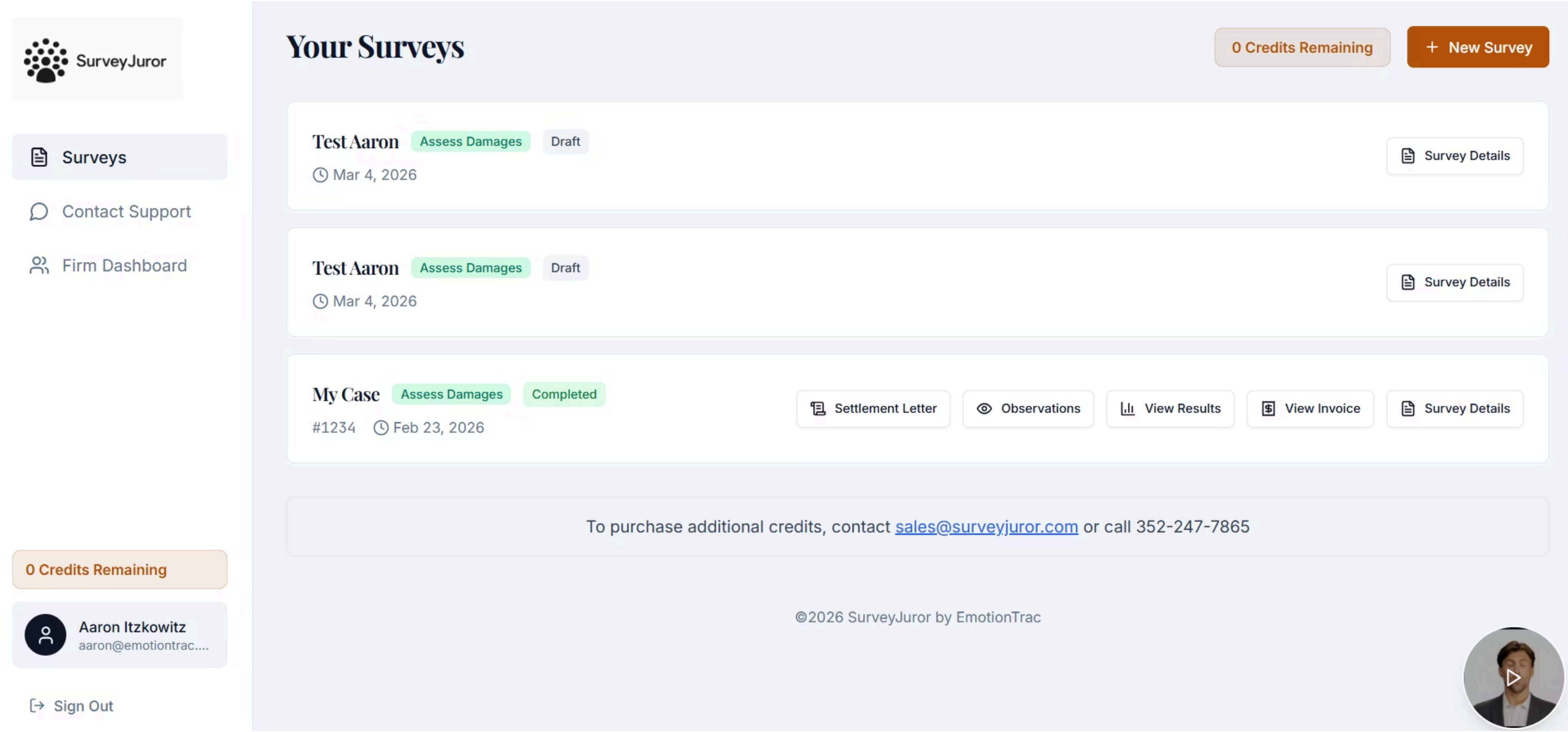
④ Download CSV

Export the full survey list to a CSV file using the **Download CSV** button in the top-right corner.

SECTION 5

My Surveys — Your Personal Survey View

The **My Surveys** page is each attorney's personal workspace within the platform. Unlike the firm-wide All Surveys view, this page shows only the surveys belonging to the logged-in user, making it easy to manage your own caseload without distraction.



① View Your Surveys

All surveys you have created are listed here, showing the case name, tags (e.g., *Assess Damages*), status badge (**Draft** or **Completed**), and creation date.

② Create a New Survey

Click the orange **+ New Survey** button in the top-right to begin building a new survey. Your available credit balance is displayed beside the button so you always know your remaining capacity.

③ Access Completed Results

For completed surveys, the Actions row expands to reveal links for **Settlement Letter**, **Observations**, **View Results**, **View Invoice**, and **Survey Details**. Everything you need in one place.

When your credits reach **0**, you will receive a notification to purchase more. Contact your salesperson or **sales@surveyjuror.com** or call **352-247-7885** to add credits to your account.