Owner & Admin Guide

Managing your ChatAboutLaw corporate account

v1.5

1. Overview

As an Owner or Administrator of a corporate account (JMB/MC or Enterprise plan), you have access to manage team members, assign seats, and monitor usage.

This guide covers all administrative functions available to you.

2. Owner Admin Assignment

The Owner Admin is automatically assigned when your account is created:

For Paid Subscriptions:

- The person who completes the Stripe payment becomes the Owner Admin
- This happens automatically when checkout is completed

For Trial/Complimentary Accounts:

- The email used to create the account becomes the Owner Admin
- The Platform Admin sets this when creating your trial account
- Trial accounts can have up to 5 seats for team testing

Owner Admin Privileges:

- Full access to manage team seats and assignments
- Can add or remove team members
- Can promote other members to Admin status
- Receives the Owner & Admin Guide automatically

Platform Admin Roles (ChatAboutLaw Team):

- Super Admin - Full platform access including team management and settings
- Admin - Subscriber management, payments, and chatbot testing (no Document access)

- Document Manager - Document Portal and chatbot testing only (secure content isolation)

All platform admin roles can test the chatbot to verify response accuracy.

The Owner Admin role cannot be transferred. Contact support if you need to change the account owner.

3. Accessing Your Dashboard

1. Visit ChatAboutLaw.com and log in with your registered email
2. Your dashboard will show your subscription overview including plan type, seat usage, and subscription dates
3. Corporate account owners see the "Team Members" tab for seat management

4. Understanding Your Subscription

Your dashboard displays:

- Plan Type - JMB/MC (10 seats) or Enterprise (20-130 seats)
- Subscription Period - Start and renewal dates
- Seat Usage - Number of seats used vs total available
- Subscription Status - Active, pending, or expired

5. Managing Team Seats

To add a team member:

1. Go to the "Team Members" tab
2. Click "Add Member" button
3. Enter the team member's email address
4. Click "Assign" to allocate a seat

The team member will receive access instructions via email.

6. Removing Team Members

To revoke access from a team member:

1. Go to the "Team Members" tab
2. Find the member in the list
3. Click the "Revoke" button next to their name
4. Confirm the revocation

The seat becomes available for reassignment immediately. The removed member loses access to both web portal and Telegram bot instantly.

7. Managing Administrators

You can designate other team members as administrators:

1. Go to the "Team Members" tab
2. Find the member you want to promote
3. Click "Make Admin" to grant administrative privileges

Administrators can manage team seats but cannot modify billing or subscription settings.

8. Viewing Team Activity

The Team Members table shows:

- Serial Code - Unique identifier for each seat
- Assigned Email - The team member using this seat
- Status - Active, available, or revoked
- Last Active - When the member last used the service

9. Subscription & Billing

Your subscription renews automatically on the renewal date shown in your dashboard. To manage billing:

- Payment methods and invoices are managed through Stripe
- Contact support to upgrade your plan or add more seats

- Cancellation requests should be sent to contact@chataboutlaw.com

10. Creating Discount Codes (Super Admin Only)

Super Admins can create promotional discount codes for new subscribers:

1. Log in to the Stripe Dashboard (dashboard.stripe.com)
2. Go to Products > Coupons
3. Click "Create coupon" to set up a new promo code
4. Configure the discount (percentage or fixed amount)
5. Set usage limits and expiration dates as needed
6. Share the promo code with eligible users

Users enter promo codes during checkout by clicking "Have a promo code?" and applying their code before payment.

11. Manual Subscriber Creation (Platform Admin)

Platform admins can manually create subscriber accounts through the Admin Panel. While most subscribers will sign up via the online checkout, there are specific scenarios where manual creation is appropriate:

When to Use Manual Account Creation:

- Offline Payment - Client pays via bank transfer, cheque, or cash instead of credit card
- Corporate Invoicing - Enterprise client requires invoice/PO process instead of online checkout
- Complimentary Access - VIP partner, early adopter reward, or promotional giveaway
- Customer Service Fix - Stripe checkout failed but payment was received separately
- System Migration - Moving existing customers from a previous platform
- Sales Demo - Giving a prospect temporary paid-tier access to evaluate features

How to Create a Manual Subscriber:

1. Go to Admin Panel > Subscribers

2. Click "Add Subscriber" button

3. Enter email address and full name

4. Select Account Type (Trial, Individual, JMB/MC, or Enterprise)

5. For Trial accounts, specify duration and number of seats (1-5)

6. Click "Create Account"

After creation, seats are automatically generated based on the plan type. For corporate plans (JMB/MC or Enterprise), you can manage seat assignments from the subscriber detail page by clicking on the subscriber row.

Important Notes:

- Manual creation creates a database record only - no Stripe subscription is created
- The account is active immediately with full access at the selected tier
- No automatic renewal or recurring billing - you must track expiration manually
- Best suited for one-time grants or offline payment scenarios
- For standard online subscriptions, direct customers to the checkout page instead

12. Document Management

Platform administrators can manage the legal knowledge base.

Who Can Access:

- Super Admins - Full platform access including document management and settings
- Admins - Access to subscribers, payments, and documents (no settings access)
- Document Managers - Access ONLY to Documents and Legal Library sections

The Document Manager role is ideal for delegating case law maintenance without granting administrative access. Document Managers cannot view subscribers, payments, billing, or settings.

Uploading Case Law Documents:

1. Go to Admin Panel > Documents

2. Click "Upload Document" button
3. Fill in document details: title, citation, court, date decided
4. Upload the PDF file
5. Add keywords and summary for better searchability

Managing Document Categories:

- Create categories to organize case law (e.g., Maintenance Fees, AGM/EGM, Developer Issues)
- Set parent categories for hierarchical organization
- Assign documents to relevant categories

Document Processing:

- Uploaded PDFs are automatically processed for text extraction
- AI-enhanced summaries are generated for quick reference
- Keywords help the chatbot find relevant cases when answering questions

Best Practices:

- Use consistent branded citation formats (e.g., PMLJ-1089)
- Include complete court name and date decided
- Add comprehensive keywords for each document
- Review AI-generated summaries for accuracy
- Citations are automatically converted to branded format for white-label consistency

13. Security Best Practices

- Only assign seats to authorized team members
- Promptly revoke access when team members leave
- Administrators should use secure, unique passwords
- Email verification is required for sensitive operations

14. Verifying the Checkout Experience

To verify promo codes work correctly for your team members:

1. Visit the ChatAboutLaw.com checkout page
2. Select any plan to proceed
3. Click "Have a promo code?" to expand the promo code field
4. Enter the code and click "Apply" to see the discount
5. Confirm the discounted price displays correctly

Share promo codes with eligible subscribers before they complete checkout. The code must be entered before proceeding to payment.

Support

For account management assistance, subscription changes, or technical support, contact us at contact@chataboutlaw.com