Instructions for the Client – New Client Experience

Client users will experience a new client portal. There are a few changes we'd like you to know to get better experience:

- There is a new user interface for the client with better visibility of his tasks.
- Settings, Folders, and Inbox has a bit different location on the homepage
- And the Projects that were previously created and shared with the client will be shown differently

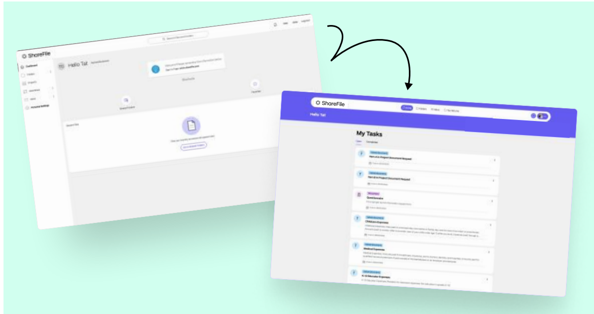
Settings

Before:

Settings were on the left navigation panel.

Now:

Clients can find settings on the right corner of their page.



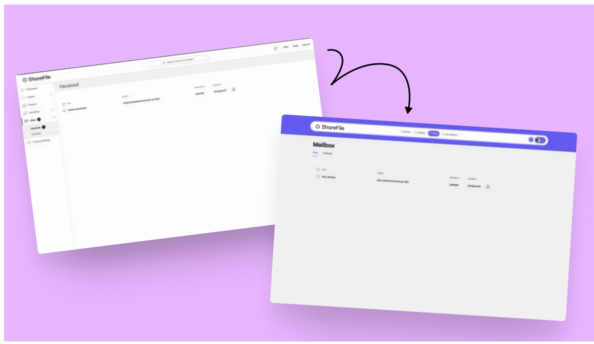
Inbox

Before:

The encrypted emails (Inbox) was on the left navigation panel.

Now:

Inbox is located on the top of the client home page.



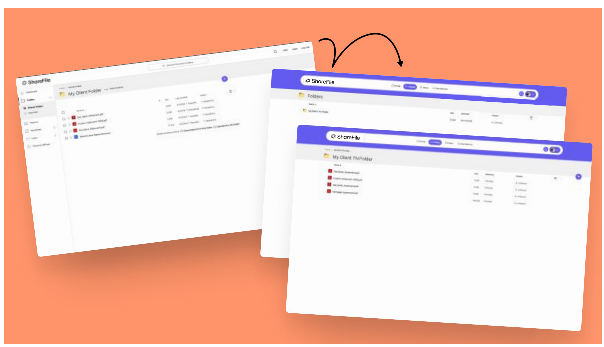
Folders

Before:

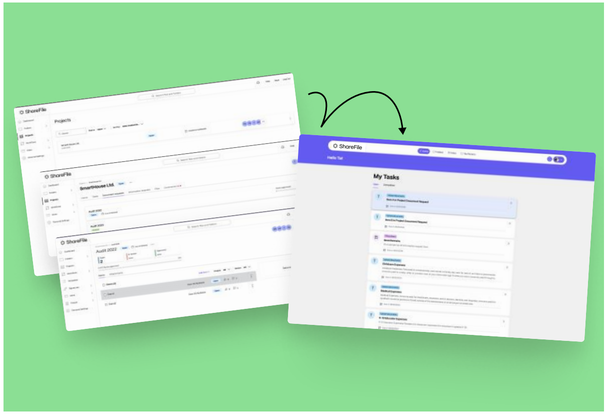
Clients can find settings on the right corner of their page.

Now:

Clients can find their folders located on the top of the client home page. They will only have access to Shared Folders.



Projects



Note, that all items in the Document request list should be assigned to the client directly.

Before:

Client can see Projects, Document Request Lists, and Items.

Now:

Client sees all assigned Items in Document Request List as Tasks on his home page. All that clients are supposed to do is to complete their tasks, clicking on them. Tasks can be completed the same way as it was before

First Time User

01

Complete your Open Tasks by clicking on each task. Upload files, answer the questions.

02

When is needed, comment navigating to a document request task and Comments on the top of the right panel of each task.

03

Find your service provider contact information navigating to a document request task and My Team on the top of the right panel of each task.

04

Find all completed tasks and uploaded files navigating to the Completed tab on the top of My Tasks on the homepage.

05

Navigate to the Folders tab on the top or your homepage to see shared with you files and folders.