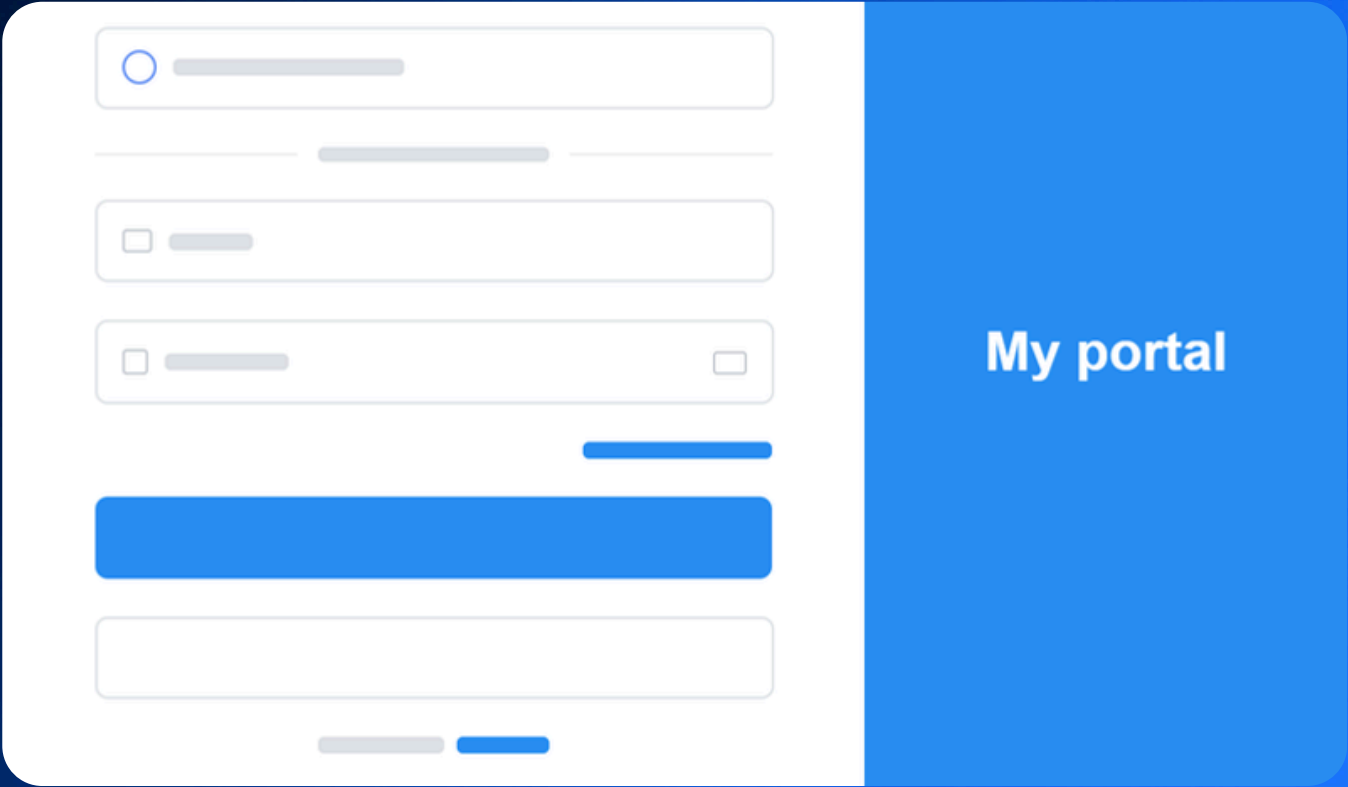


REFERENCE GUIDE

Client Portal

Your Client Portal, Start to Finish



Portal Overview and Dashboard

What It Is

The Client Portal is one branded login where customers reach their courses, groups, billing items, and files. Owners manage it from the Dashboard and Settings pages.

How It Works For Your Business

- Search for Client Portal. The page name at the top shows Client Portal, Dashboard.
- The Dashboard page is your control center and holds the button for the unified portal.
- The Settings area holds name, colors, logo, domain, and sign-in options.
- Use the preview or the portal link to see the customer view.
- Customers see courses, groups, billing, files, and their own account settings.

Portal Overview and Dashboard – Tips & Guidelines

Tips

- Learn the owner pages before you change anything.
- Open the customer view often so you can guide lost clients.
- Menu names vary a little, so look for the closest match.
- Bookmark your portal link for quick testing.

DO

- Explore Dashboard and Settings first
- Open the portal link in a new tab
- Click through as a customer would
- Note where account settings live

DON'T

- Change settings on a first visit
- Assume the owner view matches the client
- Skip the customer preview
- Hunt for the portal in old emails

Unified Portal Experience

What It Is

The unified portal experience gives customers one look and one navigation for everything they use. You turn it on from the Dashboard, and it changes only what customers see.

How It Works For Your Business

- Search for Client Portal, then open Dashboard.
- Look for the button that mentions turning on the new portal. Read its label first.
- Click it and follow any prompt that appears. No code is needed.
- Clients keep the same login and get one navigation bar.
- The new dashboard shows courses in progress, Continue Watching, group activity, and pinned groups.

Unified Portal Experience – Tips & Guidelines

Tips

- Workflows, automations, and integrations keep working after you enable it.
- Test in a private window so you see what a customer sees.
- The new view is faster and works better on phones.
- Button wording can change, so trust the label on your screen.

DO

- Read the button before clicking
- Test in a private window
- Check the new dashboard after login
- Open it on a phone too

DON'T

- Worry that logins will change
- Skip the test after enabling
- Test while signed in as owner
- Ignore any prompt that appears

Portal Branding

What It Is

Branding makes the portal look like your business. You set a name, description, two colors, square images, a support email, and copyright text in Settings.

How It Works For Your Business

- Search for Client Portal, open Settings, then the Branding section.
- Enter a Portal Name and a one-line Portal Description.
- Set Brand Color One for buttons and headings and Brand Color Two as the helper color.
- Upload a square Logo, a small Favicon, and a square Portal Image.
- Add a Support Email and Copyright text, then click Save Settings.

Portal Branding – Tips & Guidelines

Tips

- Pick colors from your logo so everything matches.
- Check that text is readable on your colors.
- If an upload fails, check the image size first.
- Look at the size note beside each upload field.

DO

- Prepare a square logo first
- Paste a hex code for exact colors
- Add a support email
- Check the result on a phone

DON'T

- Use light text on light buttons
- Upload wide or tall logos
- Skip Save Settings
- Overthink the name and description

Custom Portal Domain

What It Is

A custom domain replaces the default clientclub.net address with your own, like portal.yourbusiness.com. You add DNS records at your registrar and connect them in Settings.

How It Works For Your Business

- Search for Client Portal, open Settings, then the Domain section.
- Type your domain in the domain field. A subdomain is the safer choice.
- Add the A record or CNAME record shown on your screen at your domain registrar.
- Return and click the update button in the Domain section.
- DNS changes can take up to 48 hours. Check the status and open your address.

Custom Portal Domain – Tips & Guidelines

Tips

- Your registrar is on your domain receipt email.
- Copy and paste values, because one wrong character stops the connection.
- A subdomain keeps your main website untouched.
- Check back in an hour, then again later in the day.

DO

- Use a subdomain like portal
- Copy values exactly
- Allow time for DNS to spread
- Keep the default if you prefer

DON'T

- Retype records by hand
- Change your main website records
- Panic if it is not instant
- Skip clicking the update button

Client Signup and Login

What It Is

Clients log in with a password or an emailed verification code. New clients sign up with a name, email, and password, then confirm with a code.

How It Works For Your Business

- The login page offers a password or a verification code sent to email.
- A new client enters name, email, and password, then types the emailed code.
- The signup code expires after 15 minutes, and a new one can be requested.
- Clients complete a profile, and those details are used across the portal.
- If one email has several accounts, an account picker appears after login.

Client Signup and Login – Tips & Guidelines

Tips

- Tell clients about the emailed code option up front.
- Ask about the spam folder first when a code is missing.
- Walk through signup yourself in a private window.
- Two accounts on one email is a common cause of wrong place.

DO

- Test signup with a test email
- Mention the code option
- Check spam folders
- Check for two accounts

DON'T

- Assume clients know the steps
- Let codes sit past 15 minutes
- Skip the profile step
- Forget the account picker

Language and Google Sign-In

What It Is

Settings lets you choose the default language for your portal and decide whether clients can use Sign in with Google. Both live in Settings.

How It Works For Your Business

- Open the portal's Settings and find Language Settings to choose a default language.
- Find App Permissions to turn Sign in with Google on or off.
- Save your changes, then test in a private window.
- Check what your login page shows after each change.
- Labels can differ by account, so look for the closest match.

Language and Google Sign-In – Tips & Guidelines

Tips

- Pick the language most of your clients use.
- Google sign-in can reduce forgotten passwords.
- Always test both choices after changing them.
- Tell clients which sign-in options exist.

DO

- Choose a default language
- Decide on Google sign-in
- Test after saving
- Tell clients what is available

DON'T

- Change both settings at once
- Skip the private window test
- Assume the label never changes
- Forget to save

Inviting Clients and Profiles

What It Is

Clients get into the portal through your portal link or invites from the apps inside it. Once in, an app switcher and profile area help them move around and manage their account.

How It Works For Your Business

- Share the portal URL directly with a client.
- Invite clients from child apps, like a course offer or an affiliate program.
- First-time users set a password, and a forgotten-password screen is available.
- The app switcher at top right moves between Courses, groups, and Affiliate.
- Clients complete their profile and use Manage Your Account for details.

Inviting Clients and Profiles – Tips & Guidelines

Tips

- Send the portal link in your welcome message.
- Show new clients the app switcher.
- Remind clients to complete their profile.
- Use one link everywhere so nobody gets confused.

DO

- Share one clear link
- Explain the app switcher
- Point to Manage Your Account
- Test the first-time password screen

DON'T

- Send many different links
- Assume clients find the switcher
- Skip the profile reminder
- Forget the forgotten-password option

Notifications and Locked Defaults

What It Is

The bell icon is a notification center for portal, course, and group alerts. Owners edit portal email templates, and can lock some engagement alerts for clients.

How It Works For Your Business

- Clients see the bell icon for portal, course, and group alerts.
- Owners edit portal emails in Client Portal, Settings, Email Settings.
- Clients adjust email and push toggles in Manage Your Account, Notifications.
- Owners can control default engagement alerts, such as likes.
- A locked setting shows a tooltip saying it is managed by the administrator.

Notifications and Locked Defaults – Tips & Guidelines

Tips

- Review your email templates for a friendly tone.
- Lock only the alerts you truly need on.
- Explain the administrator tooltip to clients.
- Check the email settings after any rebranding.

DO

- Review each email template
- Lock only needed alerts
- Tell clients about the tooltip
- Test the bell icon

DON'T

- Lock everything by default
- Leave templates unchecked
- Confuse clients with no note
- Skip the client toggles

Billing Alerts and Troubleshooting

What It Is

Billing items and documents appear for clients in the portal, and notification settings control those alerts. When access fails, check domain records, codes, and profile completion.

How It Works For Your Business

- Clients find billing items such as invoices, estimates, and contracts in the portal.
- Notification settings control the alerts sent for those items.
- For domain problems, check the DNS records and domain status in Settings.
- For access problems, resend the verification code and check the spam folder.
- Confirm the client finished their profile.

Billing Alerts and Troubleshooting – Tips & Guidelines

Tips

- Retest the domain after any DNS change.
- Wait for DNS to spread before changing records again.
- Ask for a screenshot of what the client sees.
- Check the account picker when a client is in the wrong place.

DO

- Check records and status first
- Resend codes when needed
- Confirm profile completion
- Ask what screen they see

DON'T

- Change DNS in a panic
- Skip the spam folder
- Guess without testing
- Assume one account per email

Key Terms Glossary

Client Portal

One branded login for a customer's courses, groups, and files.

Dashboard

Owner page that turns on the unified portal.

Unified portal

One look and one navigation for all customer areas.

Brand color

A color used on portal buttons and headings.

Favicon

The tiny icon shown in a browser tab.

Domain registrar

The company where you bought your domain.

DNS record

An instruction that tells the internet where a domain points.

A record

A DNS record that points a domain to an IP address.

CNAME

A DNS record that points a subdomain to another address.

Verification code

A short emailed code that confirms a client's identity.

Account picker

A screen to choose between accounts sharing one email.

App switcher

A menu that moves clients between portal apps.

Getting Help

Software changes over time, so a button or menu may look a little different from this guide. If something does not match, check the Client Portal's own in-app help for the latest steps. Look for the closest label and you will find your way.