Client Portal - Introduction

Introduction to the Client Portal:

Welcome to the Setuply Client Portal! You were invited to this portal by a company that uses Setuply to support their client experience. The hardest part of any project is keeping every stakeholder informed on what needs to be done and when. The Client Portal is designed to give you a high-level view into projects while providing a seamless way to complete tasks, cases, and questions assigned to you. The following document can answer any questions you may have about the functionality of Setuply's Client Portal.

What Is Setuply?

Setuply is a Client Experience Management Platform purpose-built to facilitate collaboration between internal and external stakeholders in a single place. Our solution holistically encompasses project management, client engagement, secure data staging, and onboarding team management to simplify, expedite, and enhance any type of project. Comprehensive reporting, interactive dashboards, and client specific portals ensure a flawless execution of projects on time and within budget.

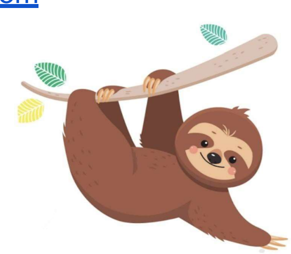
What Do Companies Use Setuply For?

The possibilities are seemingly endless with Setuply! We work with the best customers who are constantly finding new ways to utilize our extensive functionality.

Setuply is an all-in-one solution for:

- Client onboarding
- Multi-project tracking
- Project management
- Client engagement
- Secure data staging
- Internal and external stakeholder collaboration
- Reporting

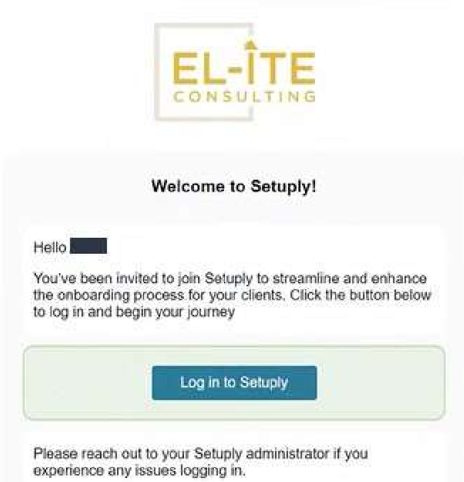
For additional information, please visit Setuply's website at www.setuply.com



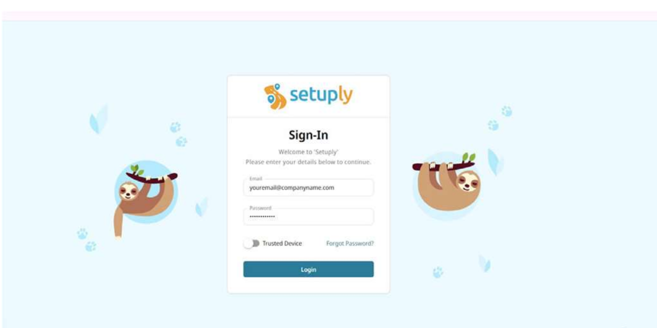
Client Portal - Documentation

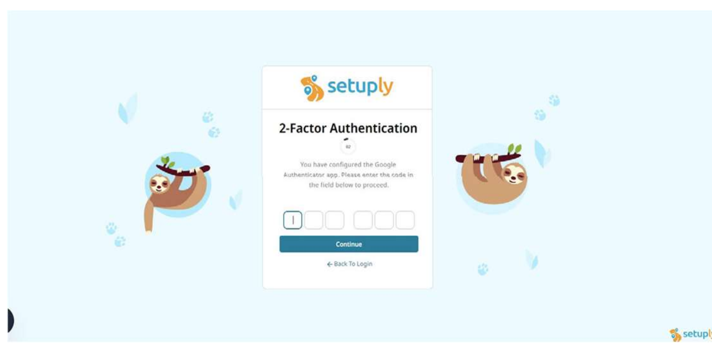
Login

1. To log in to your client portal, please follow the link provided to you via email.

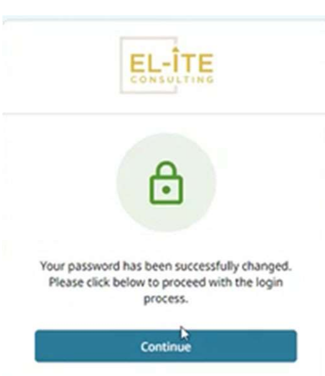


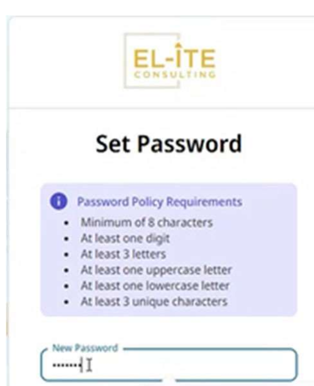
2. You will need to enter your email and will be instructed to use a two-factor authentication code emailed separately to you.





3. After your code is entered, you will be prompted to set your password. After your password is entered, a confirmation screen will appear.





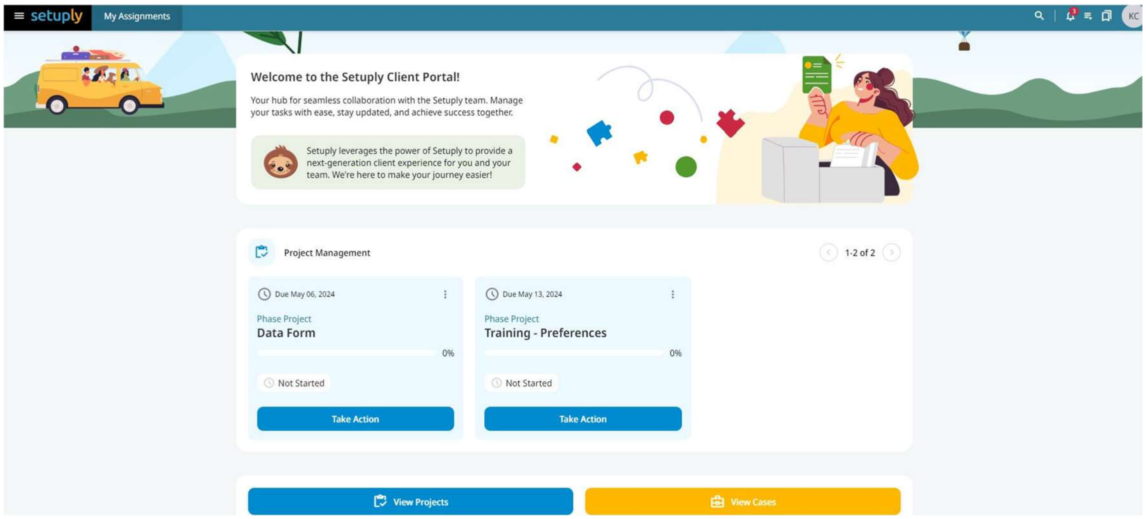
4. After you select continue, you will be prompted to login again. Once you have entered your login information, will be instructed to use a two-factor authentication code emailed separately to you.

5. Once you enter in the second MFA account, you will be prompted to scan a displayed QR code utilizing an authenticator app on your phone:

If you experience issues with the login process please email Support@el-iteconsulting.com or Submit a Support Case and include which phase of the login you are experiencing issues with. If you previously logged into the system but no longer have access to or need the MFA validation again, you will need to contact our Support team and repeat the sign-in process.

Once you have logged in, you will see the portal's main page. Here, you can complete tasks assigned to you or view your projects.

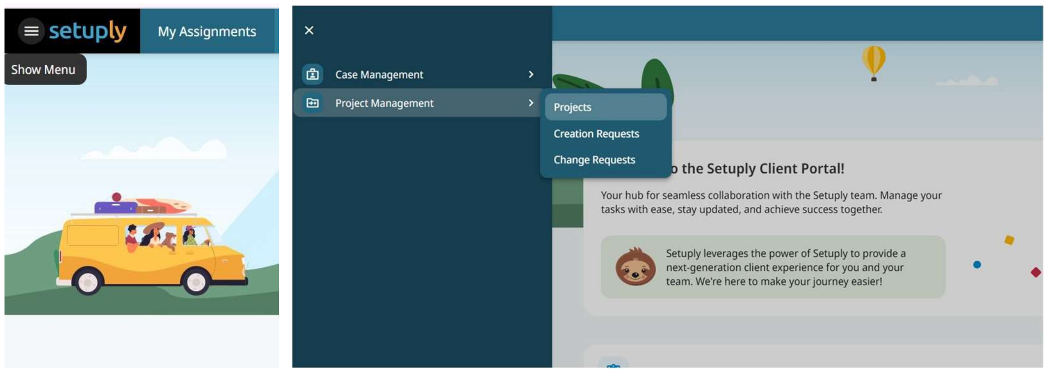
Note: Not all companies will utilize Case Management. If you do not need access to “View Cases,” you will not see that on your portal.



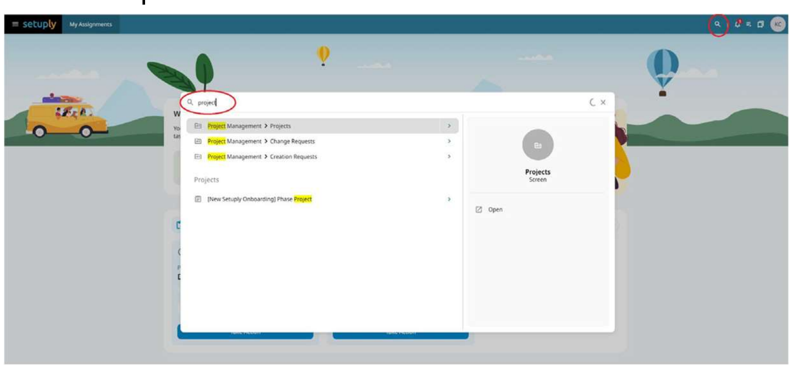
Navigation

The Client Portal is designed to highlight all your actions on the Main Page. You can complete tasks and access both Projects and Cases via the Main Page. However, if you want to move around the Setuply platform, there are three main ways to do it:

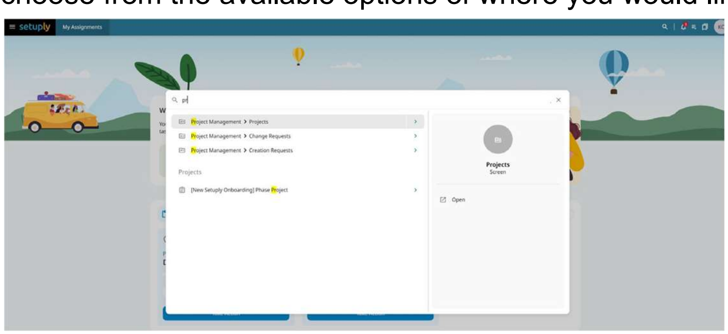
1. The hamburger menu (three horizontal lines) at the top left-hand side of your screen is the traditional navigation. Click on those three lines and you will see a menu of options you can hover over to select.



2. You can use the Magnifying Glass on the top right-hand corner of the screen to bring up a search window. Here, you can type where you would like to go and select from available options.



3. You can just start typing! If you begin typing, the search box will appear and you can choose from the available options of where you would like to go.

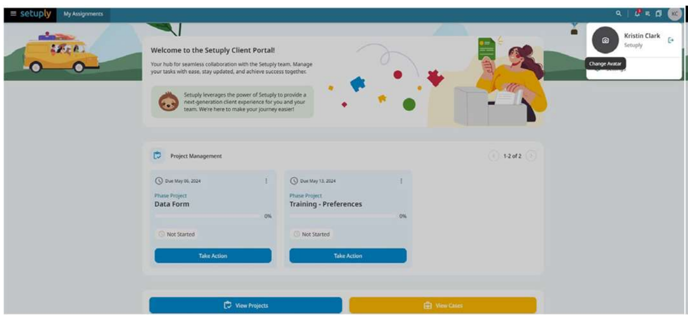
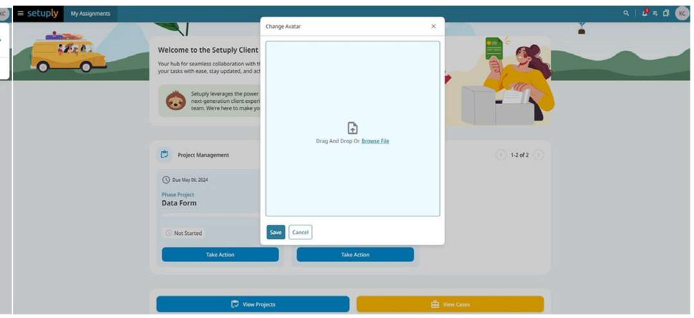


Making The Client Portal Yours: Settings

Setuply's Client Portal is your personal space to work through projects with your implementation team. Within Settings you can update your photo, change your password, update your notifications, and control secure devices.

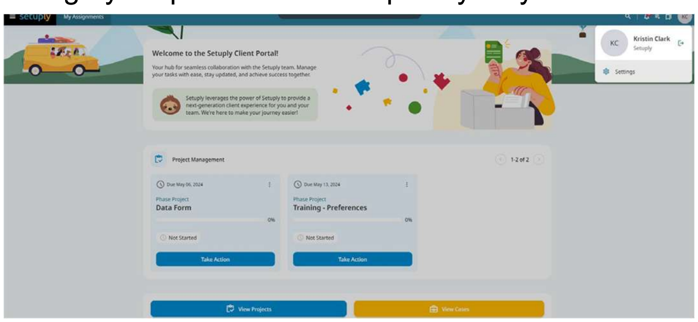
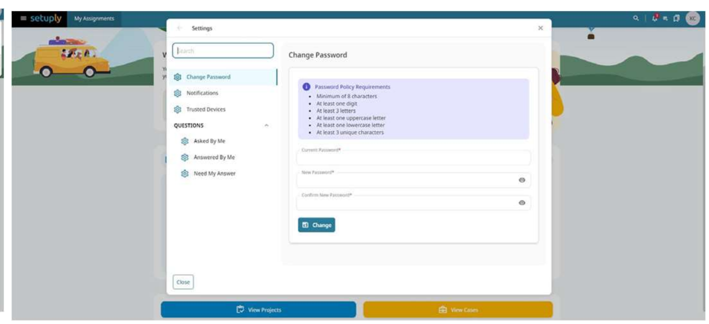
Update Your Avatar

At the top right-hand corner of your screen, you will see a circle with your initials in it. Update this to a photo of you by clicking on the circle and hovering over the initials of the pop-up. You can drag/drop a photo or use the upload feature.

Change Your Password

Go to the Avatar on the top right-hand corner of your screen and click on it. You will see a box drop down with the label "Settings". Go to "Settings" and a new pop-up will appear. Choose "Change Password" on the left-hand side and follow the instructions/parameters. You can change your password as frequently as you would like.

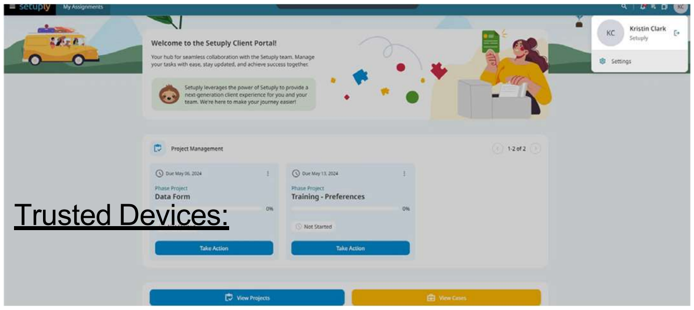



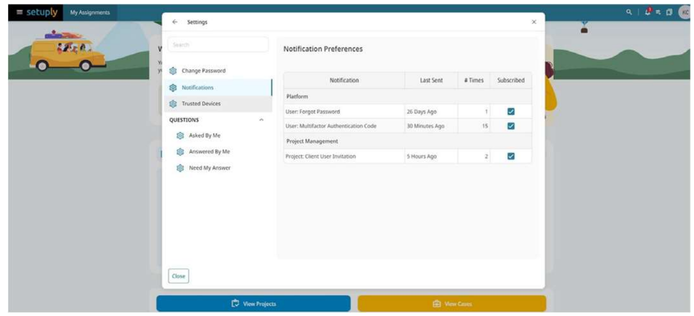
Notifications

The owner of the project will determine which notifications you receive. Any notification that you receive a minimum of one time will be documented in the Notifications section, under Settings. Go to your avatar, click "Settings", and then choose "Notifications" on the left-hand side. Here, you can subscribe or unsubscribe to any notification you have received at least once.

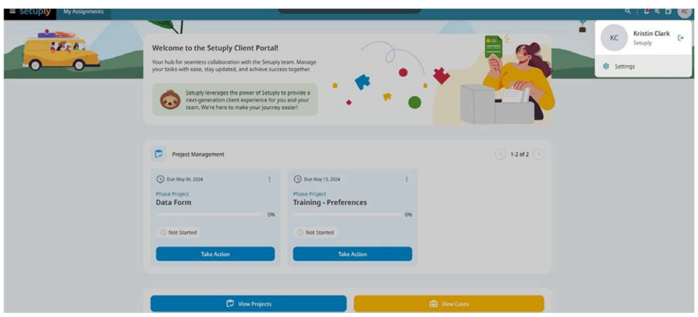
> *Note: Notifications are meant to help you throughout the duration of the project. Before you decide to remove a notification, connect with the Project Manager.

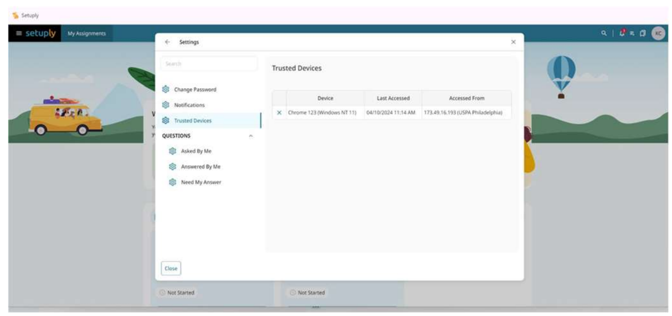
Trusted Devices:





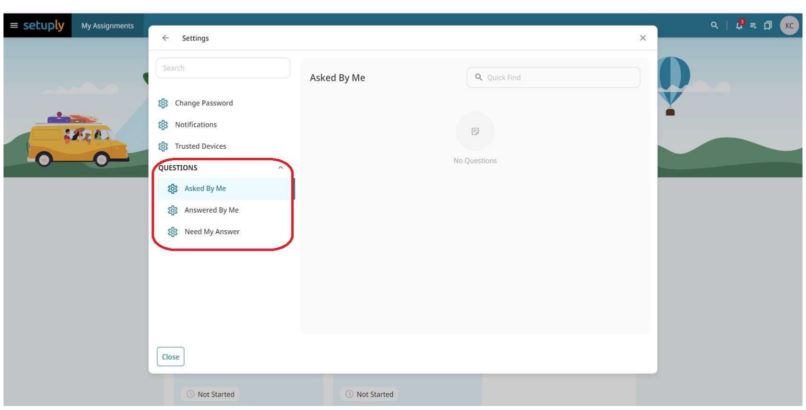
When you log in to your client portal, there is a toggle called “Trusted Device”. If you would like to make the device you are logging in from “trusted,” you can click on that toggle. All Trusted Devices will be displayed under Settings. Go to your Avatar, click on “Settings”, and then choose “Trusted Devices” from the left-hand side of the pop-up. If you would like to no longer have one of your devices listed as trusted, you can delete it using the “x” on the same row as the device.





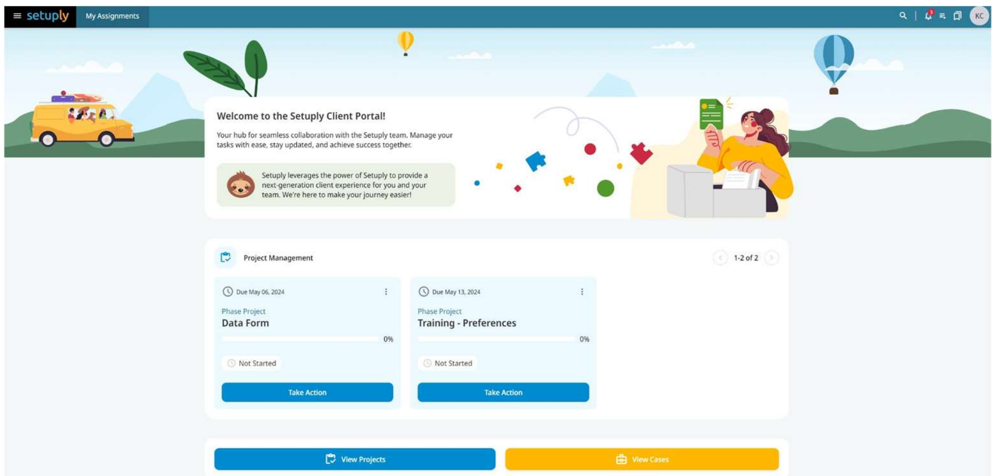
Questions

During the duration of a project, it might be necessary for you or the Project Manager to ask a question not addressed in the project itself. If this happens, you can find questions that are asked to you on your homepage or in the Settings section. Go to “Settings”, click on your Avatar, choose “Settings,” and you will see a Questions section on the left-hand side of the pop-up screen.



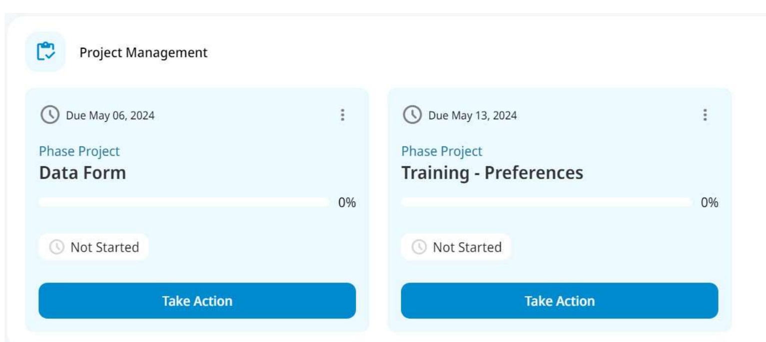
Main Portal Page

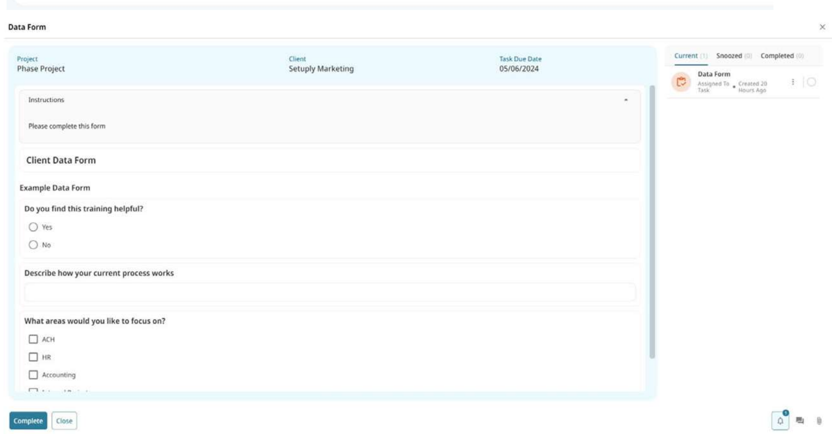
When you log in to your client portal, you will land on the Main Portal Page. Think of this as your control center. Everything that needs your attention will be conveniently available at your fingertips!



The tasks that are assigned to you from the project will be in the middle of the page. You'll find a brief description of the task, a completion percentage, and a "Take Action" button. To work on any of these tasks, select "Take Action." Follow the instructions in the pop-up to complete the task.

*Note: You can choose to "complete" a task when done or "close" a task so that you can come back to it at a later time. You will see the percent complete on the main page to reflect how much of that task is done. When a task is completed, it will disappear from the main page.

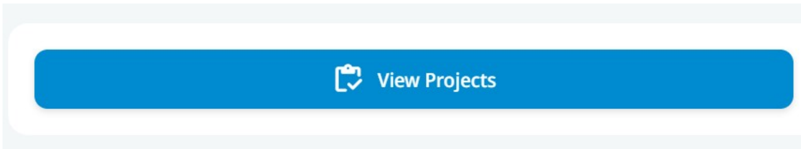




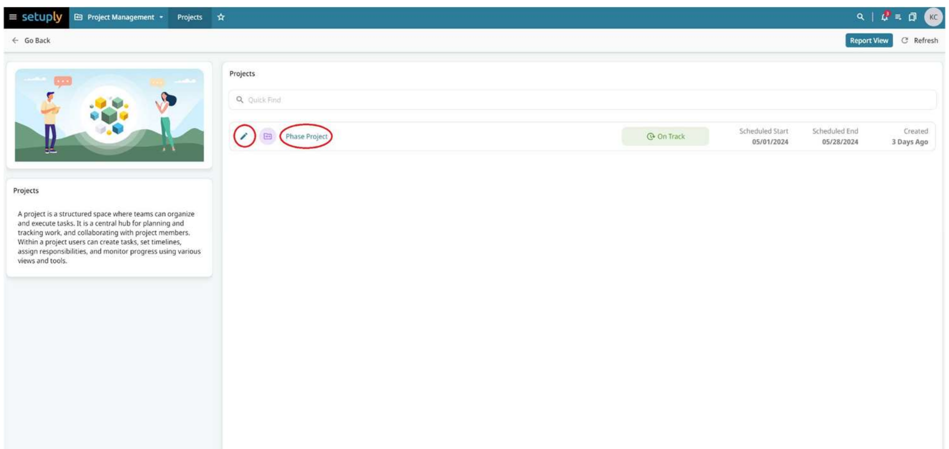
View Projects

If you would like to see the full project instead of just the tasks you need to complete, click on the “View Projects” button at the bottom of the “Main Portal Page.”

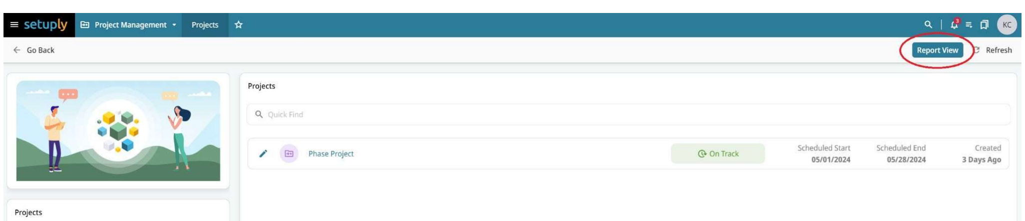
*Note: You can also access projects using Setuply’s Navigation tools.



Once you select “View Projects,” you will be brought to the “Simple View” of all projects you are involved in. To view a specific project, click on either the name of the project or the pencil icon to the left of the name.

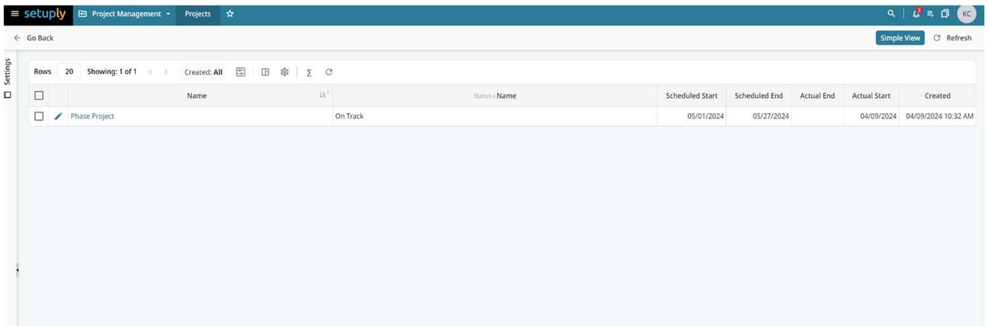


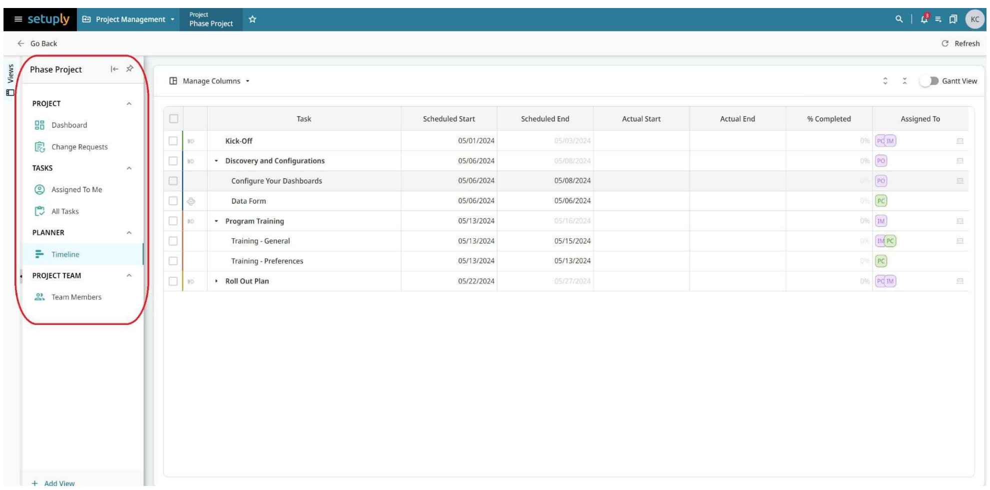
For a more detailed view, you can switch to “Report View” in the top right-hand corner of the screen. The Report View has additional functionality to sort your projects, change columns, and see a table view summary.



Projects

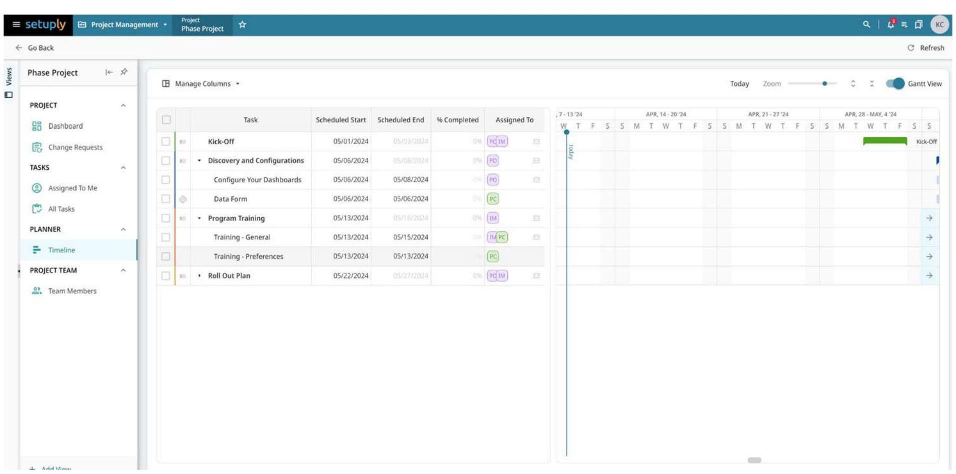
When you click into a specific project you will land on a View specific to your project. You will most likely land on the “Timeline” section of the project, but you can navigate to any of the other project specific sections on the left hand side of the screen.



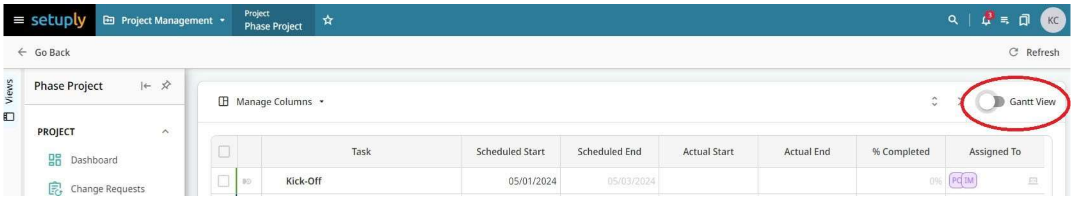


Timeline

The “Timeline View” gives you the full picture of your project. You can choose to view the project as a List or in a Gantt Chart (or split the screen with both!). You can resize the width of the List or Gantt Chart by sliding the divider between the two. Both views show you when tasks/phases are set to start and their expected completion date. You can also see who each task is assigned to and get ahead on any work that needs to be done.

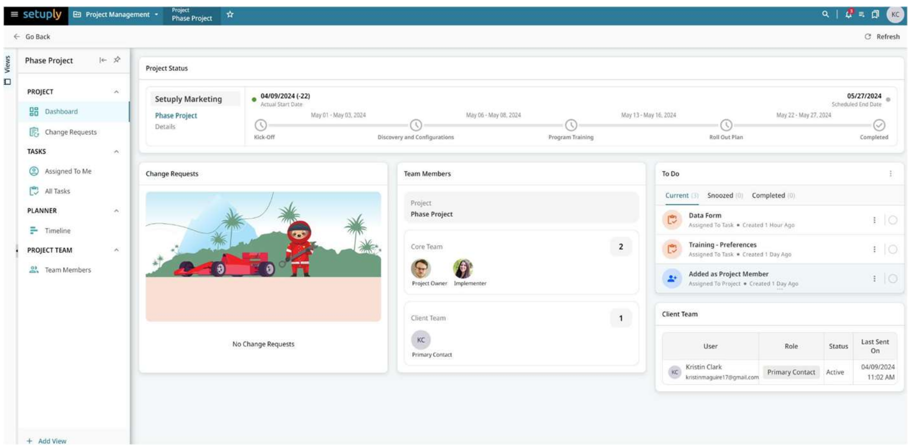


You can also fully remove the Gantt Chart by clicking on the toggle at the top right-hand side of the screen.

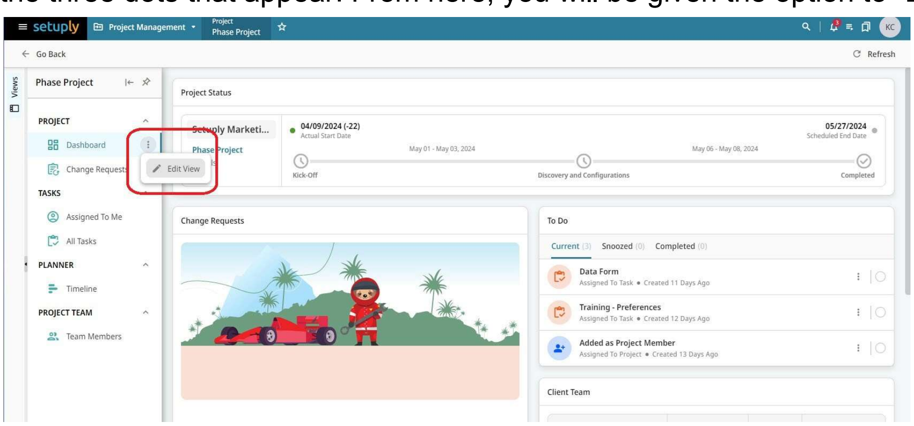


Dashboard

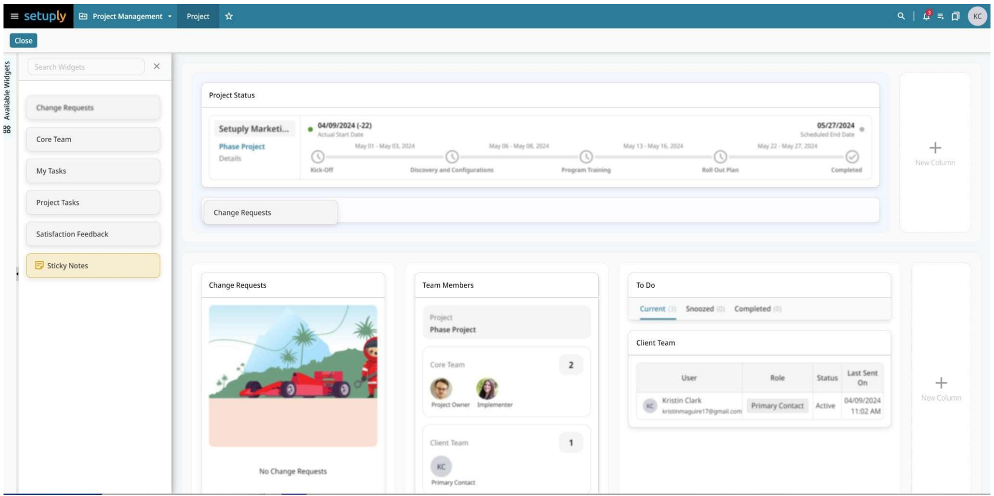
The "Dashboard View" is a personalized view filled with helpful Widgets to provide project information. The Project Manager can give you suggestions on which Widgets will be the most helpful for you.



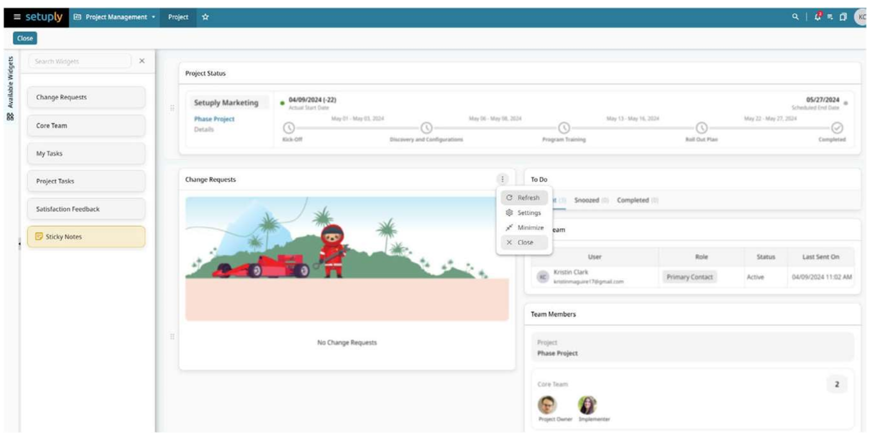
You can edit your Dashboard by hovering over "Dashboard" in the left-hand panel and clicking the three dots that appear. From here, you will be given the option to "Edit View."



Once you are in Edit mode, the Widgets that are available to you will be displayed on a new left-hand panel. To add a Widget to your Dashboard, click on the Widget and drag it into place on the Dashboard.



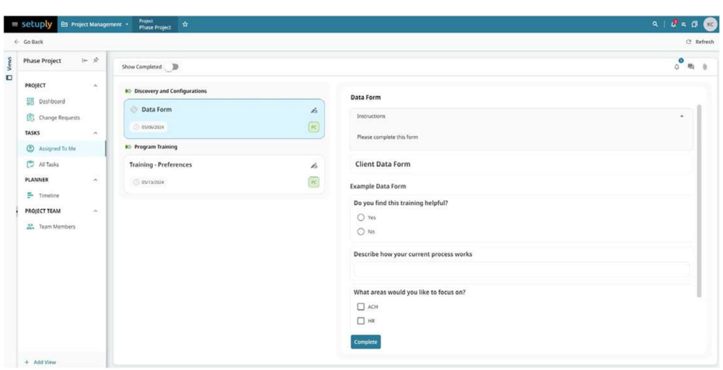
To remove a Widget, hover over the top right-hand corner of your Widget and click the three dots that appear. Here, you will see an option to “Close” the Widget. If you remove a Widget, it will become available for you to re-add on the left-hand panel.

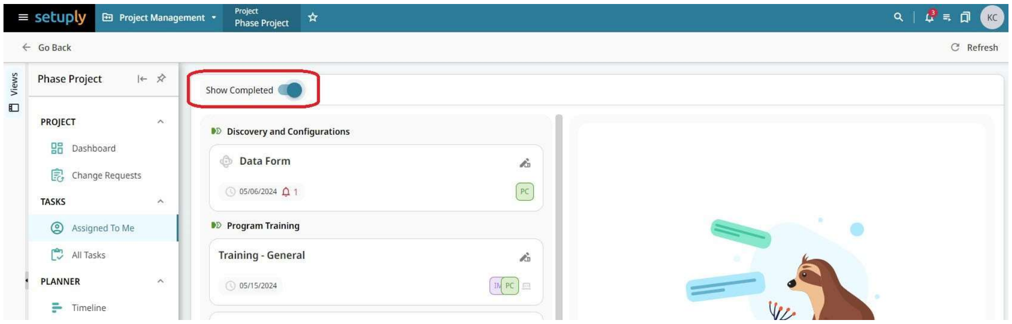


Tasks - Assigned To Me

This view gives you the ability to see all of the tasks that are assigned to you. To view and work on a task, click anywhere on the task and it will pop up for you on the right-hand side of the screen. Some clients prefer this view to the Main Portal Page so they can see all their tasks at once.

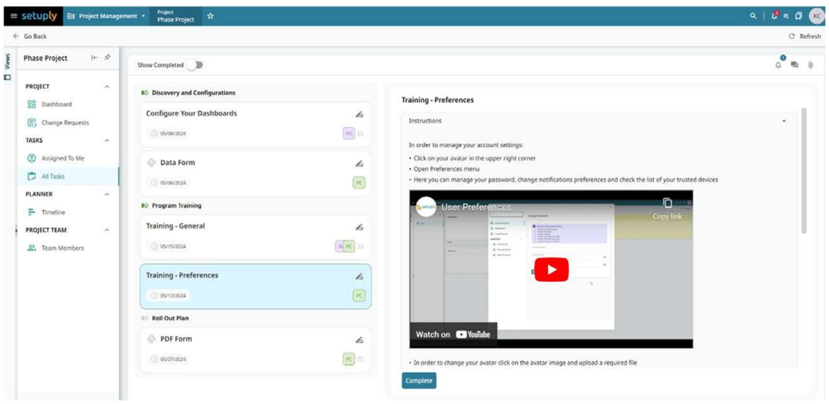
*Notes: You can choose to toggle between tasks that need to be completed and tasks that have already been completed.





All Tasks

This view is similar to the “Assigned To Me View.” The difference is you can see all tasks — even ones that are not assigned to you.



Team Members

To see all of the team members associated with the project, you can use the “Team Members View.”