



Client Portal

Prepared By

Jerry Roxas

Founder & CEO

Last Updated

February 11, 2015

Table of Contents

Purpose..... 3

How to Log In 3

How to Change Your Password 3

How to Change Your Profile Picture..... 4

How to View Your Project 4

How to Start or Participate in a Project Discussion..... 4

How to Add a Friend 5

How to Accept a Friend..... 6

How to Send a Message..... 6

How to Reply to a Message 7

How to Log Off 7

Purpose

The purpose of this document is to provide clients and support team members with instructions on how to use and navigate the MyDigiBrand Client Portal. At MyDigiBrand, customer service and satisfaction is our top priority. We work hard to make sure our clients are informed about their project every step of the way, and are pleased to provide this portal to facilitate ease of communication. Through the MyDigiBrand Client Portal, you will be able to view your project status and notes, as well as send messages and files related to your project.

One of the benefits of communicating through the Client Portal (versus regular email or telephone) is that it maintains a record of all communications related to your project. This is extremely helpful in complex projects, where there are multiple tasks being addressed simultaneously.

How to Log In

MyDigiBrand is proud to provide its clients with access to our Client Portal. Through the MyDigiBrand Client Portal, you will be able to view your project status and notes, as well as send messages and files related to your project.

To log in to the Client Portal, follow these steps:

1. Go to www.mydigibrand.com
2. Click on 'My Profile' in the top menu
3. Enter the username and password that was provided to you

How to Change Your Password

It is recommended that you change your password immediately upon logging in the first time. Your password should be at least eight (8) characters long, and we highly recommend that it contain both upper and lower case characters, as well as numbers and special characters. You should also never share your password with anyone.

To change your password, do the following:

1. Click on the 'My Profile' menu option at the top of each page.
2. At the bottom of the 'My Profile' page, enter your new Password twice (in Password and Repeat Password). Your password should be at least eight (8) characters long, and we highly recommend that it contain both upper and lower case characters, as well as numbers and special characters.
3. Click on the 'Update' button at the bottom of the page.

Your password has been changed.

How to Change Your Profile Picture

MyDigiBrand is proud to provide its clients with access to our Client Portal. Through the MyDigiBrand Client Portal, you will be able to view your project status and notes, as well as send messages and files related to your project. Clients can (and should!) upload a profile picture so that our team members can put a picture with a name when working on your project.

To upload a profile picture, do the following:

1. Click on the 'My Profile' menu option at the top of the page. If you are not logged in, please do so now.
2. Beneath your name, click on the option that says 'My Profile'. You will now see your profile information.
3. Click on the link that says 'Change Profile Photo'. You will now see a screen that allows you to change your avatar (which is just another name for your profile picture).
4. Browse for the photo you would like to use, and click on the 'Upload' button.
5. You can now crop the photo to how you want it to be presented by clicking and dragging the edges of the crop box. Once you are satisfied with your crop, click on the 'Crop' button.

Your profile photo has now been changed.

How to View Your Project

Through the MyDigiBrand Client Portal, you can view the status of your project, as well as send and receive messages related to your project. This is a great way for our customers to stay informed about their project 24/7. Each message that is posted automatically notifies everyone related to your project.

One of the benefits of communicating through the Client Portal (versus regular email or telephone) is that it maintains a record of all communications related to your project. This is extremely helpful in complex projects, where there are multiple tasks being addressed simultaneously.

To view your project, do the following:

1. Click on the 'My Profile' menu option at the top of the page. If you are not logged in, please do so now.
2. Beneath your name, click on the option that says 'My Projects'. You will now see a list of all projects that you are involved in.

How to Start or Participate in a Project Discussion

Through the MyDigiBrand Client Portal, you can view the status of your project, as well as send and receive messages related to your project. This is a great way for our customers to stay informed about their project 24/7. Each message that is posted automatically notifies everyone related to your project.

One of the benefits of communicating through the Client Portal (versus regular email or telephone) is that it maintains a record of all communications related to your project. This is extremely helpful in complex projects, where there are multiple tasks being addressed simultaneously.

To start or participate in a project discussion, do the following:

1. Click on the 'My Profile' menu option at the top of the page. If you are not logged in, please do so now.
2. Beneath your name, click on the option that says 'My Projects'. You will now see a list of all projects that you are involved in.
3. Click on the Project that you want to view. You will now see the Activity Stream for that project.
4. To start a new discussion in that project, do the following:
 - a. Start typing in the box at the top that says 'What's new in PROJECTNAME?' You may also upload a picture, video or link.
 - b. Click on the button that says 'Post'. Your discussion has now been posted to the project, and everyone assigned to the project will receive an email notification of the discussion.
5. To reply to an existing discussion in that project, do the following:
 - a. Locate the discussion that you want to reply to in the Activity Stream.
 - b. Type your reply in the box below the discussion.
 - c. Click the 'Post' button. Your reply has now been posted to the discussion, and everyone assigned to the project will receive an email notification of your reply.

How to Add a Friend

MyDigiBrand is proud to provide its clients with access to our Client Portal. Through the MyDigiBrand Client Portal, you will be able to view your project status and notes, as well as send messages and files related to your project. As with any community based portal, our Client Portal allows clients and team members to connect as 'friends'. All friendships must be requested and accepted by the individuals.

To add a friend, do the following:

1. Click on the 'My Profile' menu option at the top of the page. If you are not logged in, please do so now.
2. Beneath your name, click on the option that says 'My Friends'. You will now see all active members of MyDigiBrand.
3. In the 'Search Members' box, type all or part of the name of the member you would like to request a friendship with, and then press enter.
4. A list of all members who match your search will now be displayed. Click on the 'Add Friend' option beneath each member's username to send them a friendship request.

You may also directly request a friendship from any member from within the community section of our Client Portal. To directly request a friendship, do the following:

1. From anywhere within the community section of our Client Portal, click on a members name. You will now see that member's profile.
2. Click on the button beneath their name that says 'Add Friend'. A friendship request has now been sent to that member.

How to Accept a Friend

MyDigiBrand is proud to provide its clients with access to our Client Portal. Through the MyDigiBrand Client Portal, you will be able to view your project status and notes, as well as send messages and files related to your project. As with any community based portal, our Client Portal allows clients and team members to connect as 'friends'. All friendships must be requested and accepted by the individuals.

To accept a friendship request, do the following:

1. Click on the 'My Profile' menu option at the top of the page. If you are not logged in, please do so now.
2. Beneath your name, click on the option that says 'My Notifications'. You will now see all of your notifications, including friendship requests.
3. Click on 'the friendship request you would like to accept. NOTE: Do NOT click on the 'Read' option, as this will simply mark the friendship request as read.
4. Beneath the users name, click on either 'Accept' or 'Reject'.

How to Send a Message

Through the MyDigiBrand Client Portal, you can view the status of your project, as well as send and receive messages related to your project. This is a great way for our customers to stay informed about their project 24/7. Each message that is posted automatically notifies everyone related to your project.

One of the benefits of communicating through the Client Portal (versus regular email or telephone) is that it maintains a record of all communications related to your project. This is extremely helpful in complex projects, where there are multiple tasks being addressed simultaneously.

To send a message, do the following:

1. Click on the 'My Profile' menu option at the top of the page. If you are not logged in, please do so now.
2. Beneath your name, click on the option that says 'My Messages'. You will now see your messages.
3. Click on 'Compose' link.
4. In the 'Send To' box, start typing the username or name of the person you would like to send the message to. Your matching connections will appear in a drop down box. Select the connection that you would like to send the message to. You can add as many recipients as you want.

5. In the 'Subject' box, type your message subject.
6. In the 'Message' box, type your message.
7. When you are ready, click the 'Send' button. Your message has now been sent to the recipient(s).

How to Reply to a Message

Through the MyDigiBrand Client Portal, you can view the status of your project, as well as send and receive messages related to your project. This is a great way for our customers to stay informed about their project 24/7. Each message that is posted automatically notifies everyone related to your project.

One of the benefits of communicating through the Client Portal (versus regular email or telephone) is that it maintains a record of all communications related to your project. This is extremely helpful in complex projects, where there are multiple tasks being addressed simultaneously.

To reply to a message, do the following:

1. Click on the 'My Profile' menu option at the top of the page. If you are not logged in, please do so now.
2. Beneath your name, click on the option that says 'My Messages'. You will now see your messages.
3. Click on the message topic that you would like to reply to. You will now see the detailed message.
4. Type your response in the box above the 'Reply' button.
5. When you are ready, click the 'Reply' button. Your response has now been sent to the sender.

How to Log Off

MyDigiBrand is proud to provide its clients with access to its Client Portal. This portal gives clients direct access to their projects. Clients should take care to log off of the Client Portal when they are done accessing their information, to avoid unwanted viewing your project information.

To logoff the Client Portal, do the following:

1. Click on the 'My Profile' menu option at the top of the page. If you are not logged in, you will see your member profile and links to your Client Options.
2. Beneath your name, click on the option that says 'Log-Out'.
3. You are now logged off.