Client Portal User Guide:
Streamline Your Support and Work Flow

Overview of the Client Portal

Welcome to our Client Portal, your centralized hub for managing support requests and website work tasks. Our Client Portal ensures you can easily communicate with us, track the progress of your requests, and stay updated on the status of your projects. Whether you need technical support or have specific website tasks, the Client Portal streamlines the process, making it easy, efficient and transparent.

## Benefits of Using the Client Portal

- **Centralized Communication:** All your support tickets and work requests are managed in one place, ensuring clear and organized communication.
- **Real-Time Updates:** Receive instant notifications and updates on the status of your requests, so you're always in the loop.
- **Easy Tracking:** Monitor the progress of your support tickets and work tasks with our intuitive work flow board.
- **Improved Efficiency:** Quickly log issues and submit tasks without the need for back-and-forth emails, saving you time and effort.
- **Enhanced Collaboration:** Collaborate directly with our team through the portal, making it easier to provide additional information and receive timely responses.
- **Transparency:** Enjoy a clear view of your project's status, from the initial request to completion, ensuring transparency and accountability.

By leveraging the Client Portal, you gain a powerful tool that enhances your experience with our services, making it easier to get the support you need and keep your projects on track.

Accessing the Client Portal

When you go to the portal you may already be logged in and you will automatically see your work board and support tickets in the portal. The box on the right hand side will say 'You are already logged in.
I f you are not logged in, enter your details into the Login Fields and your support tickets and work board will display accordingly.
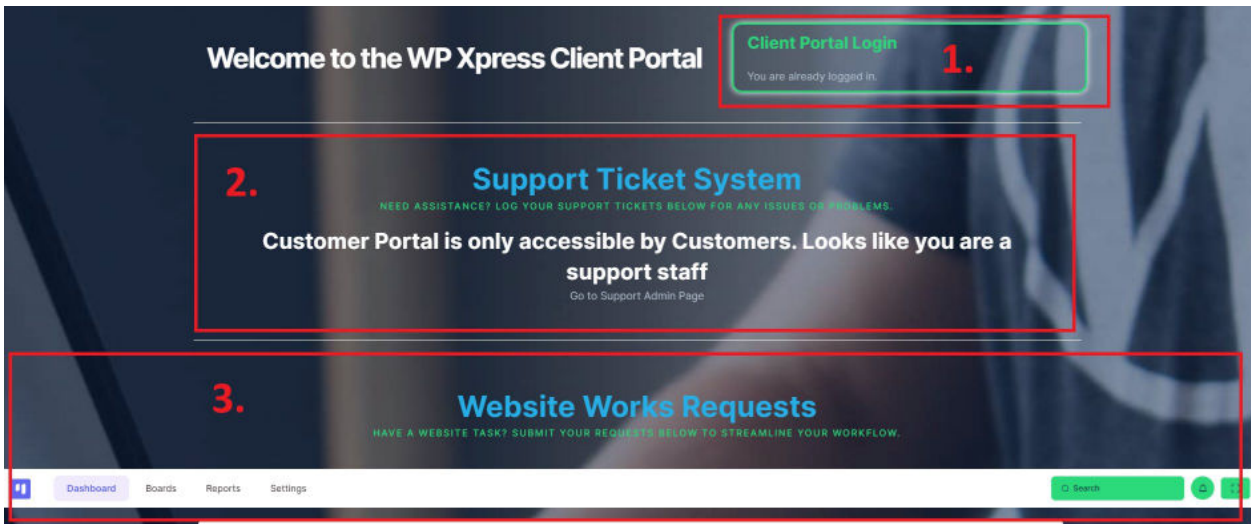
1. **Client Portal Login – [Link to the Client Portal](#)**

   This area allows you to login to your client portal. It will say that you are already loggin or it will provide the following for you to login.

   Username Field: Enter your username
   Password Field: Enter your password.
   Click on "Log In."

   Security Tips: Use a strong password, avoid sharing login credentials, and log out after use.

2. **Support Ticket System**

   This are will display any support tickets you have raised with WP Xpress. Here you can:-

   Create a New Ticket

   Click on "Support Tickets" in the dashboard.
   Select "New Ticket."
   Fill in the required fields (issue description, category, priority).
   Attach any relevant files or screen shots.
   Click "Submit."

   Tracking Existing Tickets

   View the status of your tickets (Open, In Progress, Resolved).
   Update or add comments to existing tickets.

   Respond to Existing Tickets

   You may respond to tickets via the portal or reply via email,
   All ticket responses will be visible in the Support Ticket Section within the Client Portal.

   Reopen Closed Tickets

If for some reason your ticket should not be closed you may reopen the ticket and add further comments. It will simply slip back into the support ticket process and be attended to by our support team.

The tickets will be at the status of New, Active, or Closed.
Each time a ticket is moved or responded to you will receive an email notification. Or you can view in your portal and check the status of a ticket

3. Website Work Requests

Section for submitting and managing work requests in the form of tasks with a workflow.

Work Request Types can be of the following nature.

- Content Updates
- New Content Additions
- Design Changes
- New Design – Enhancement Features
- New Services – Improve SEO, Speed Optimisation, WordPress Hosting, Website Offsite Back/up Services
- Logo/Brand Redesign
- Ad Word Campaigns
- Email Campaigns

Please allow for scope of work definitions and quoting to be assessed for more detailed work requests.

How the Board Works

We move the tasks on the board to give a visual representation of what stage the work is at, and who has responsibility for it at that work stage. It allows easy communication via comments and attachments between both client and WP Xpress.

- Client logs Work Request (Requested Work)
- WP Xpress asses the work and liaises with the client to further define scope, provide or request further information, pricing and contract if required.
- Once agreed WP Xpress commences the work (In Progress)
- The work is completed and the client is required to approve what has been done (Client Approval)
- Once client is happy the work will be applied to the LIVE Website and be deemed finished (Completed) and the work request will be closed.

Our board work flow is as follows:

Workflow Stage	Purpose	Ownership	Action Required from Client	Next Stage
REQUESTED WORK	Client Request Work in the form of a Task	Client – with the client until assessed by WP Xpress	Nothing further Only to respond to any questions raised by WP Xpress in regards to the Scope of Work required and approval of commencement.	IN PROGRESS It will move into this stage when work commences.
IN PROGRESS	To highlight WP Xpress has commenced the work requested	WP Xpress	Nothing further Only to respond to any questions raised by WP Xpress	ON HOLD / WAITING OR CLIENT APPROVAL
ON HOLD / WAITING	If for any reason any parties are waiting for something or holding off on the work for any reason, the task will move to this workflow until further notice.	WP Xpress	Comments to explain why it has been halted or what the task is waiting for before it can move forward again.	CLIENT APPROVAL
CLIENT APPROVAL	Once work is completed and ready to be viewed by the client it will be moved to this work flow. The work will not become LIVE on the website until it has been past this point.	Client – with the client until works are approved to go LIVE.	Communication with WP Xpress to acknowledge approval of the works.	COMPLETED
COMPLETED	The work is done and has gone LIVE. The task is closed.	WP Xpress	Nothing Further – Over time these tasks will be archived as to not clog up the board.	

Submitting a New Request

Navigate to "Website Work Requests" in the dashboard.

In the REQUESTED WORK Column.

Click on the 'Template Task – Work Task Template' (it will open the template)

In the top right hand corner CLICK ON '+Create task from Template'

Click in the summary box, and type in a Summary of the Work Requested (you will

type over the existing text Work Task Template)

Fill in the details (request type, description, deadline).

Attach any necessary files.

Click "Submit."

7. Additional Resources

- **Video Tutorials:** We will be providing some video tutorials in the near future.
- **FAQs:** As this is new for WP Xpress we would love to build a concise list of FAQ's. So please send us your questions about the Client Portal to support@wpxpress.com.au so we can answer and help future users.
- **Support Contact:** If you would like some further help with our Client Portal, please contact us and we can provide a walk-through for you. support@wpxpress.com.au or +61 8 9468 8967.

Thank you, we look forward to seeing you in the Client Portal