



Client Portal

THE DS GROUP

How to Use Client Portal

The Client Portal is a secure, private area of the website designed to give users access to confidential content such as files, projects, and messages. This guide walks you through how to log in, navigate the portal, and make the most of its features.

1. Accessing the Client Portal

1. Visit the Website

- Navigate to your website's homepage or a dedicated login page.
- You might see a "Log In" or "My Account" link in the menu.
- **Figure 1** shows an example of the front-end homepage with the Client Portal navigation link highlighted.

2. Log In

- Enter your username (often your email address) and password on the login screen.
- Click "Log In" to proceed to your private dashboard or area.
- **Figure 2** demonstrates the login page from the user's perspective.

Tip: If you forget your password, click the "Lost your password?" link to reset it.

2. Navigating Your Private Dashboard

After logging in, you'll usually land on our homepage or a dedicated client portal homepage. Depending on how the site is configured, you might see sections like:

- **Home**
- **My Files**
- **My Projects**
- **My Files**
- **Tasks**
- **My Account**

A typical layout might look like **Figure 3**. From here, you can view files or see messages

3. Viewing Private Documents

Viewing Private Documents If private files or documents have been shared with you, they can be accessed in the “My Files” section:

1. **Go to “Documents”**

- Click the “My Files” link in your front-end menu.
- **Figure 4** shows an example document list.

2. **Open a File**

- Click on a file title (e.g., “Project Plan,” “Invoice #123,” etc.).
 - The file page might include a download link or a preview.
 - **Figure 5** demonstrates the single file view with a “Download” button.
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3. Viewing Private Projects or Files

If private files or documents have been shared with you, they can be accessed in the “My Files” section:

- Project updates
- Proof Uploading
- Confidential information or policies

How to Access Projects

1. **Locate “Projects”** in the front-end menu.
 2. Click on the title of the Project you want to read.
 3. The page will open and display text, images, or embedded videos if available.
 4. **Figure 6** shows a typical private file layout with text and graphics.
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5. Checking Conversations

Here you can create private conversations with The DS Group members, as well as connect them to projects:

- **Click the “Conversations” link** (or similar) from your menu to see a list of threads or notifications.
 - **Select a message** to open its content.
 - **Figure 7** illustrates a sample messages interface.
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6. Editing or Uploading Content

Editing or Uploading Content you may contribute content or upload files:

1. Click **“New File”** from your front-end menu or dashboard panel.
2. Fill in the title, brief, who owns/should see it and attach any relevant files.
3. Click **Submit** or **Publish**.
4. **Figure 8** highlights the front-end upload form, showing how to attach files or images.

Important: If you don’t see these options, it means your role does not allow creating or editing private content. Contact the DS Group if you need extra permissions.

7. Logging Out

To log out from the client portal:

1. Find the “Log Out” or “Logout” button (often located in the same place as your login area).
 2. Click to securely end your session.
 3. You’ll be redirected to a default WordPress logout page or the homepage.
 4. **Figure 9** shows the typical front-end logout link in a header or menu.
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Quick Troubleshooting Tips

1. **Can’t Log In?**
 - Double-check your username and password. If you’ve forgotten your login details, use the “Lost Password” link.
2. **Missing Content?**
 - Your admin might not have shared any documents yet. Contact them if you believe you should have access.
3. **No “Upload” or “Edit” Buttons?**
 - Your user role may not have permission to add or edit. Only certain roles can create or manage private content.
4. **Visibility issues?**
 - The client portal should be available for desktop and mobile. If you are having any troubles, please contact us.

Conclusion

Conclusion The Client Portal offers a secure and user-friendly way to access private content, view files, and engage with projects. Depending on your permissions, you may also upload and manage content. Remember to log out when you're done for security.

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Figure 1:

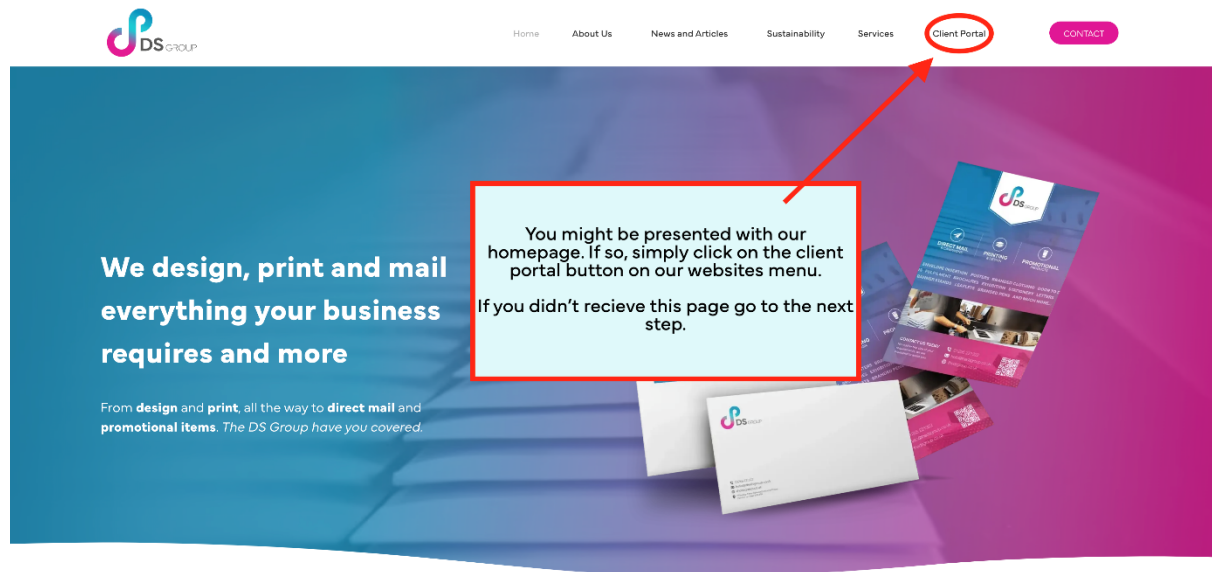


Figure 2:

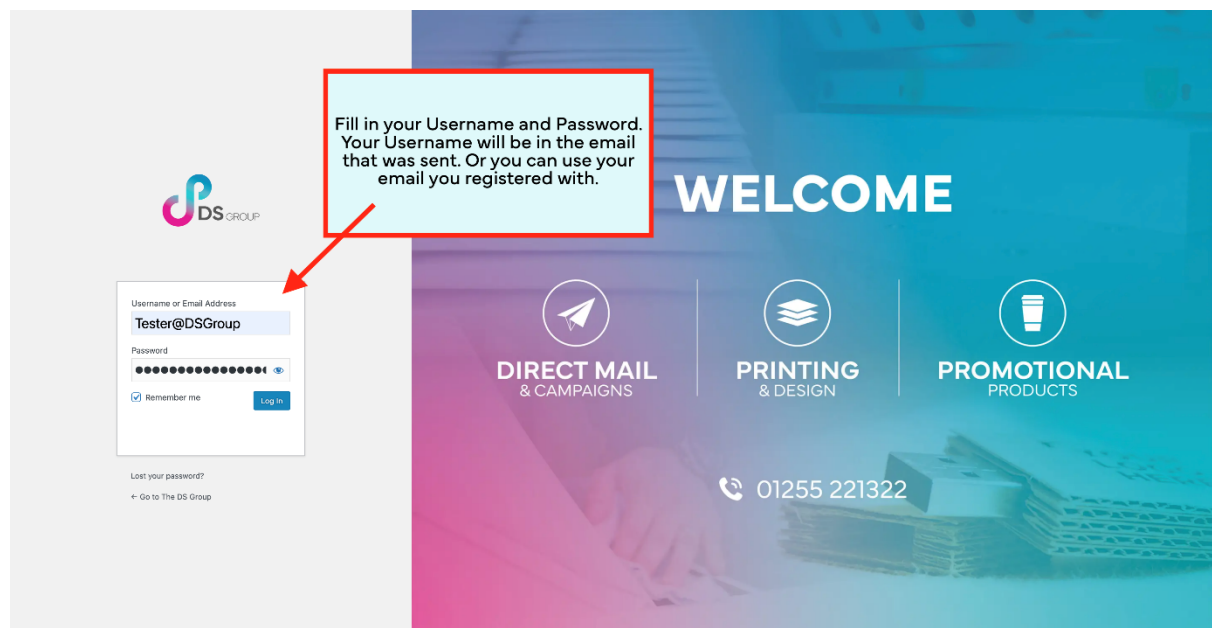


Figure 3:

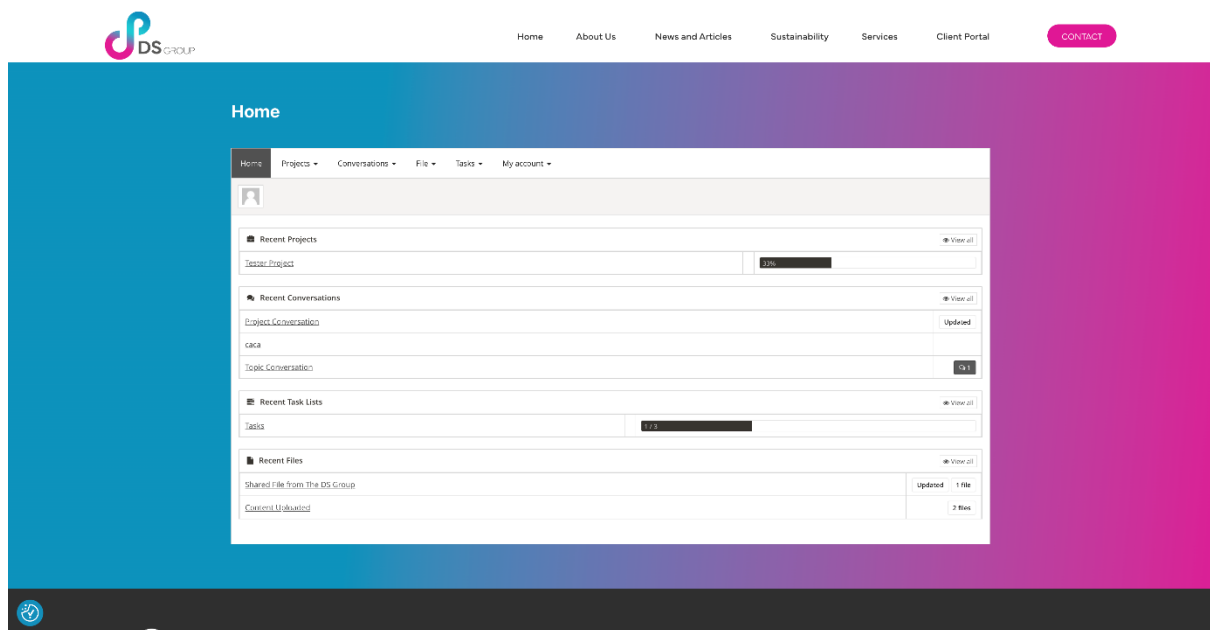


Figure 4:

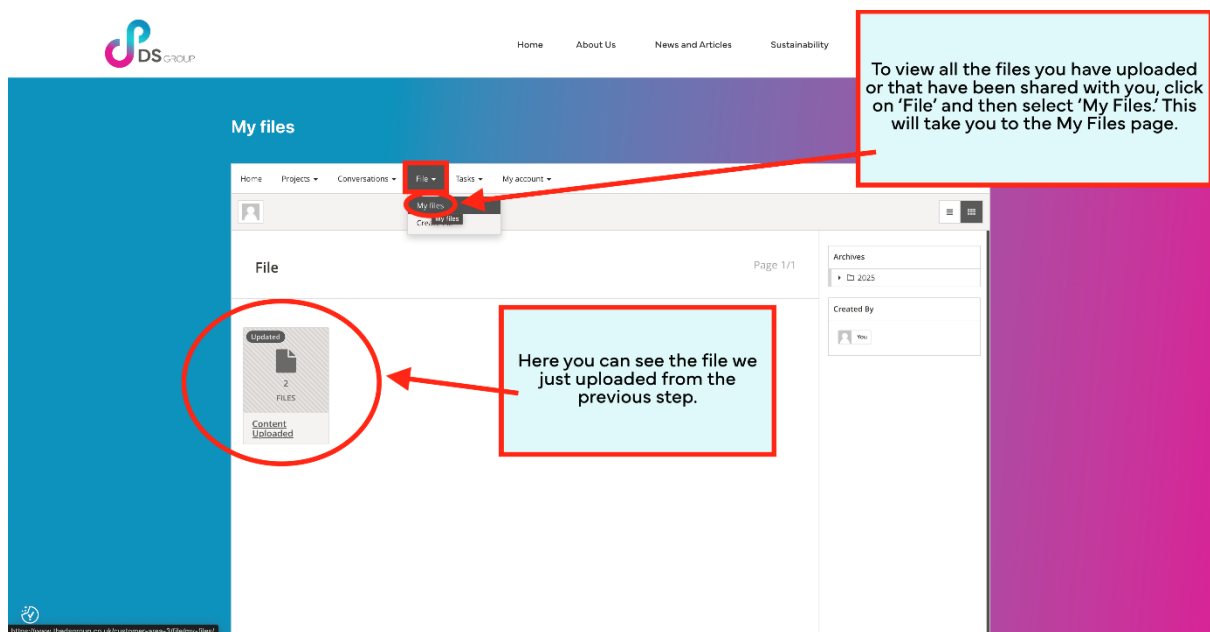


Figure 5:

DS GROUP

Home About Us News and Articles

Content Uploaded

TEST@DSGROUP / JANUARY 16, 2023

Home Projects Conversations **File** Tasks My account

Mark as unread Edit Delete

Author: TEST@DSGROUP | Date: JANUARY 16, 2023 | Assigned to: 1 USER | Assigned to: 1 GROUP

Brief Description on content:

2 attachments | Download all attachments

Uploaded File.png	2.38 MB	Download
Test-1.csv	2.99 MB	Download

This highlighted section shows the attachments within the file, which are available for download.

Here is the content that we uploaded. As you can see, it displays various details about the file. Please note that you can perform the same actions with files shared with you by us.

Suggested view: Test@DSGROUP. Edit your profile. Log out? Required fields are marked *

Add Comments

Figure 6:

Home About Us News and Articles Sustainability Service

File Tasks My account

Page 1/1

Updated: 1 FILE | Updated: 2 FILES

Shared File from The DS Group | Content Uploaded

Archives: 2025

Created By: DS Group

In this demonstration, The DS Group have shared a file with us.

The 'archives' section shows any stored content that you would actually like to keep with us for a long period of time. Viewing things from years and months.

The 'Created By' section allows you to filter files by different authors (whoever created the content). This feature makes it easier to find your desired content.

Figure 7:

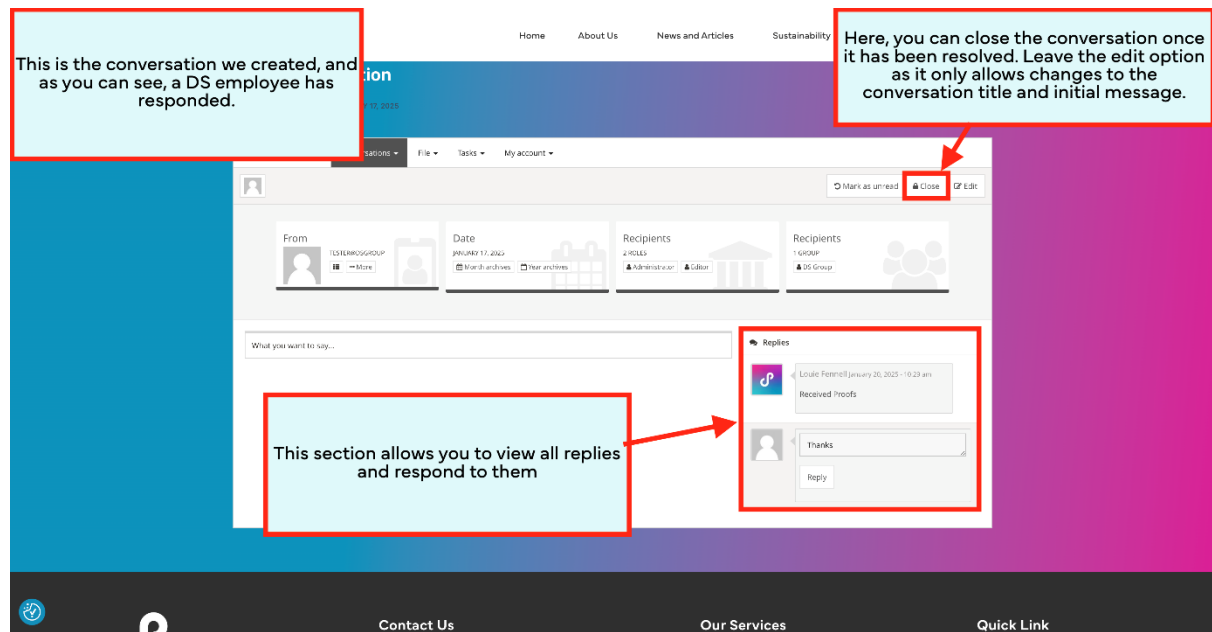


Figure 8:

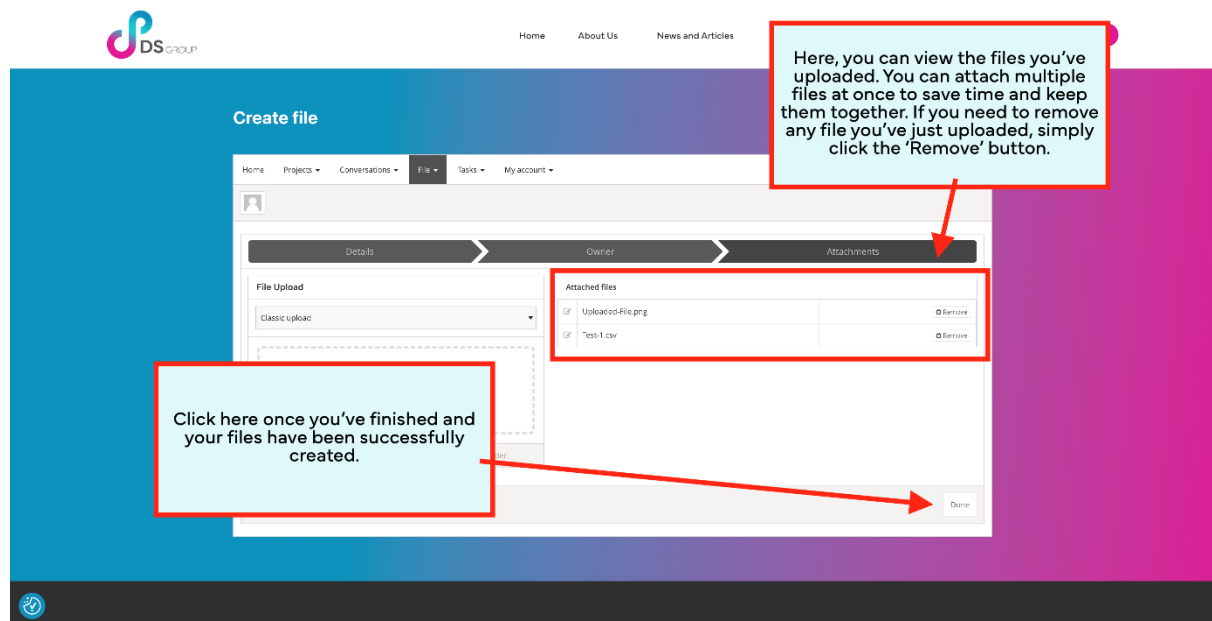


Figure 9:

