

ClientPortal 1.0 RC1

Administrator & Client User Manual

This manual explains the normal day-to-day use of ClientPortal, including leads, clients, projects, Smart Files, proposals, contracts, invoices, payments, scheduling, files, team access, automations, security, and the client portal.

Recommended business workflow

Lead -> Client -> Project -> Smart File -> Proposal -> Contract -> Invoice/Payment -> Work/Files/Scheduling -> Project completion.

Important: This application is a business workflow tool. Financial totals should be reconciled with your payment provider/accounting records. Back up both the database and the uploads directory before major upgrades.

1. Signing In and Account Security

Administrators and staff: sign in through the main login page. Staff only see sections allowed by their permissions.

Clients: use the same login page and are routed to the client portal.

If a password is forgotten, choose **Forgot password?**. The reset link expires after 60 minutes and can be used only once. Client invitation links are also time-limited.

After repeated failed sign-in attempts, the application temporarily rate-limits login attempts. Use unique passwords and HTTPS in production.

2. Admin Dashboard

The dashboard is the starting point for administrators and staff. It summarizes clients, projects, leads, invoices, payments, appointments, active invites, and recent activity. Use the left navigation to move through the CRM.

3. Pipeline / Leads

Add a lead when someone first inquires. Record their name, contact details, service interest, estimated value, source, notes and follow-up date. Move the lead through New, Contacted, Qualified, Proposal, Won or Lost.

When a lead becomes a real customer, convert the lead. The system creates or links the client account and generates a secure portal invitation instead of assigning a temporary password.

4. Clients and Portal Invites

Clients contain the business relationship and contact information. Lifecycle statuses include onboarding, active, paused and completed. From the client record you can review related projects and activity.

Use **Client Invites** to create/reset portal access. Active invitations can be revoked. Sending a new invite invalidates older unused invitations for that client.

5. Projects, Tasks and Milestones

Create a project for the actual work being delivered. Set the project status and due date. Tasks are individual work items; milestones are larger checkpoints. Project Templates can create repeatable task structures for common services.

6. Services and Packages

Services/Packages are reusable offers. Define the package name, description, price, quantity behavior and optional add-ons. Packages can be placed into Smart Files and used to generate proposals or invoices.

7. Smart Files

Smart Files are the guided client workflow. A Smart File can contain content, forms, package selection, proposals, contracts, invoices, scheduling and upload steps. Use the builder to add steps and drag them into the order the client should follow.

Some steps complete automatically. Proposal steps can complete after acceptance, contract steps after signing, and invoice steps after full payment. Manual content/scheduler/upload steps can be marked complete where appropriate.

Keep Smart Files short enough that the client understands what to do next. Use Workflow Templates for repeated processes.

8. Proposals

Create a proposal for a client/project, add line items, introduction and terms, then send it. Clients can review and accept or decline sent proposals. Use proposal status to track the sales decision.

9. Contracts

Contracts contain the agreement text. After a contract is sent, the client can complete the electronic signature acknowledgement. Signature records include audit information. If signed terms materially change, use a new agreement rather than silently changing the signed record.

10. Invoices and Payments

Invoices contain line items, issue/due dates, status and payment history. Add hosted Stripe, PayPal or external payment links when appropriate. Manual payments can also be recorded by an authorized admin/staff user.

Verified Stripe/PayPal webhook events can automatically record payments. The application protects against common duplicate-event/transaction cases, but payment totals should still be reconciled with the provider.

11. Recurring Invoices

Recurring schedules support weekly, monthly, quarterly and yearly invoice generation. Set the client, optional project, amount, frequency, next invoice date and due-day offset. Automatic generation requires the cron runner.

12. Calendar / Appointments

Create appointments and connect them to a client and optional project. Clients can review their schedule in the portal. Cancel or update appointments from the admin workspace.

13. Messages

Messages keep client communication attached to the CRM. Encourage clients to use portal Messages for project-specific questions so the conversation remains easy to find.

14. Files

Admins and clients can exchange approved file types. The default maximum upload is 15 MB. Files are downloaded through protected PHP endpoints. The database backup does not contain uploaded file contents; back up the uploads directory separately.

15. Automations

Automation rules can remind users about overdue invoices, unsigned contracts, pending proposals and lead follow-ups. The cron runner checks these conditions. Configure a strong cron key and schedule the runner on the production server.

16. Team Accounts and Permissions

Only administrators can manage Team accounts. Staff can be granted access to specific sections such as clients, projects, messages, sales, billing, automations, files, calendar, services, templates, Smart Files, reports, settings and audit logs. Permissions are enforced on the server.

17. Reports, Activity and Audit

Reports provide operational summaries. Activity timelines show client/project actions. Audit Log records important security and administrative actions, including logins, invitations, team changes, portal activation and verified payment webhook activity.

18. Settings and Email

Settings control branding, Public Site URL, From email, mail transport, SMTP credentials, payment destinations, webhook credentials, PayPal mode and cron key. For production, configure the full HTTPS Public Site URL so invitation and password-reset emails contain usable absolute links.

Use **Send Test Email** after configuring SMTP. Review **Email Log** if delivery fails. Stored SMTP/payment secrets are not printed back into the settings form.

19. Production and Backups

Before launch, use **System Health** and **Production Check**. Use a dedicated MySQL user rather than root, enable HTTPS, configure SMTP, configure payment webhooks, configure cron, and verify the uploads/log directories are writable.

Use **Database Backup** to export SQL. The SQL backup may contain application settings and secrets, so store it securely. Copy the uploads directory separately. Test restoring backups before relying on them.

20. Client Portal Guide

Home: overview of active work and actions. **Projects:** project progress, tasks and milestones. **Messages:** communicate with the business. **Proposals:** accept/decline pricing. **Contracts:** review/sign agreements. **Invoices:** review balances and payment links. **Files:** upload/download project files. **Schedule:** appointments. **Smart Files:** complete guided workflow steps. **Activity/Notifications:** review account updates.

Clients should use the portal rather than sharing passwords, payment-card data, or unnecessary sensitive information in messages/files.

21. Suggested First-Day Setup

1. Create the administrator and sign in.
2. Open Settings and enter business name, Public Site URL and branding.
3. Configure SMTP and send a test email.

4. Configure Stripe/PayPal webhook credentials if online payments are used.
5. Create Services/Packages.
6. Create Project and Workflow Templates for repeatable work.
7. Add a test lead and convert it to a client.
8. Send a test client invite and sign in as that client.
9. Run a complete Smart File from proposal through payment.
10. Configure cron and test automations/recurring billing.
11. Run System Health and Production Check.
12. Download a database backup and separately copy uploads.

Version: ClientPortal 1.0.0-rc1 with Help & Manual enhancement.