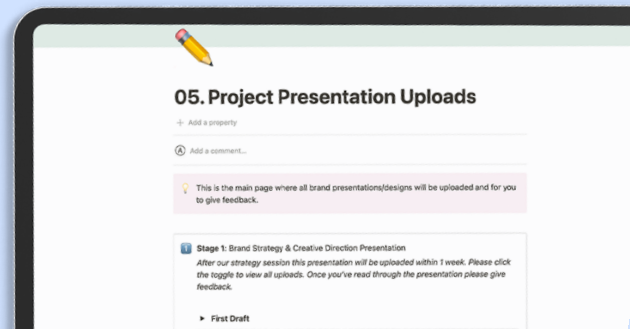
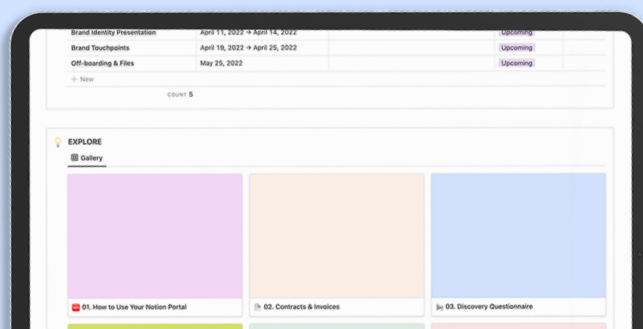
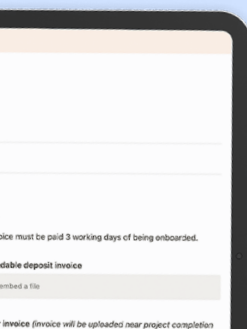
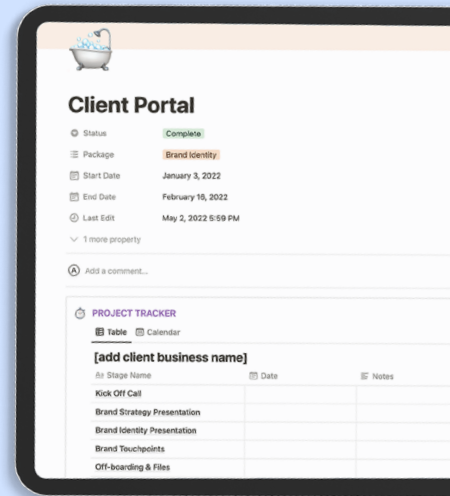
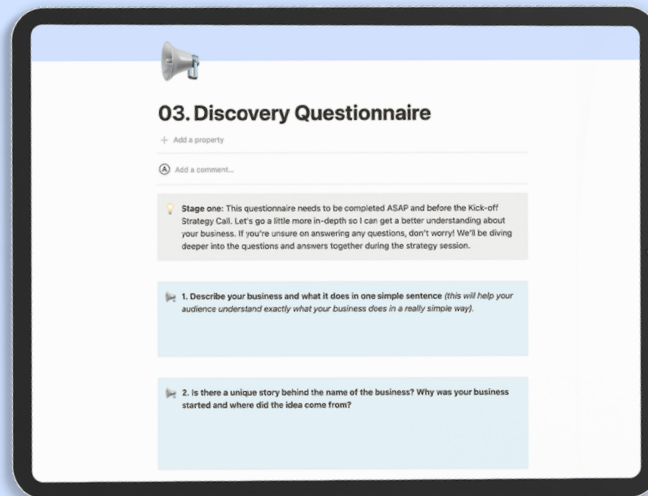
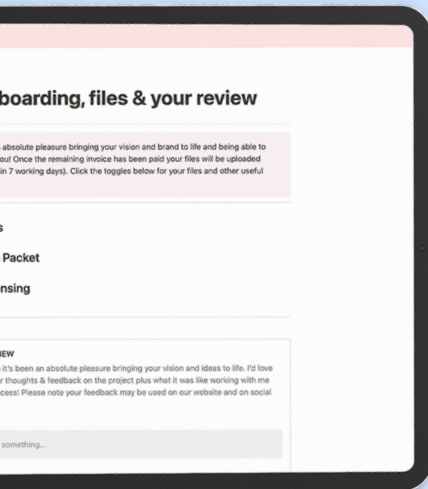




Comment utiliser le Client Portal

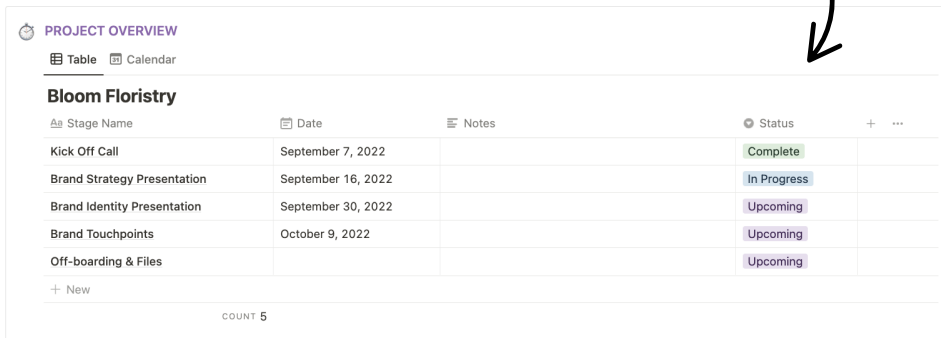


Homepage

La page d'accueil du portail client se compose de deux composants principaux : Aperçu du Projet et Tableau de Bord du Projet.

Project Overview

Suivez l'avancement de votre projet ici. Cela vous rappelle efficacement le calendrier du projet et les dates prévues pour les livrables. L'état de chaque étape du projet sera mis à jour par mes soins au fur et à mesure, vous n'avez donc pas besoin de toucher ou d'ajuster quoi que ce soit ici

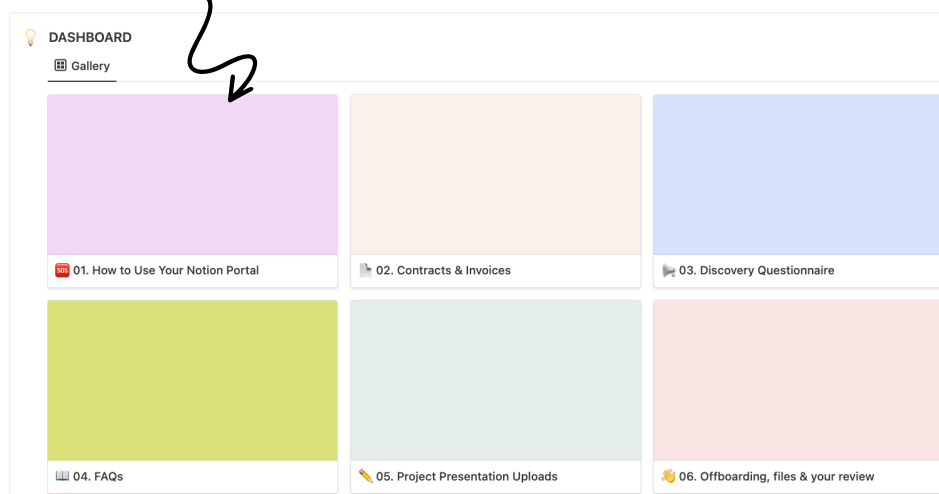


The screenshot shows a 'PROJECT OVERVIEW' section with a toggle for 'Table' and 'Calendar'. Below is a table for 'Bloom Floristry' with columns for Stage Name, Date, Notes, and Status. The status column contains color-coded labels: 'Complete' (green), 'In Progress' (blue), and 'Upcoming' (purple). A '+ New' button and a 'COUNT 5' indicator are at the bottom.

Stage Name	Date	Notes	Status	
Kick Off Call	September 7, 2022		Complete	
Brand Strategy Presentation	September 16, 2022		In Progress	
Brand Identity Presentation	September 30, 2022		Upcoming	
Brand Touchpoints	October 9, 2022		Upcoming	
Off-boarding & Files			Upcoming	

Project Dashboard

Le tableau de bord est le centre de toutes les informations liées au projet. Il a été conçu pour suivre un ordre spécifique, allant de 1 à 6. Il vous suffit de cliquer sur la boîte colorée correspondante pour afficher la page.



Project Dashboard

Étape 1 - Comment utiliser votre portail client?

Click the PDF to download the document.

The screenshot shows a Notion page titled "01. How to Use Your Notion Portal" with a red "SOS" badge. It includes a text block explaining the need for a walkthrough, a link to a PDF document "How to use your client portal.pdf", and a "NEXT STEPS" section with a checkbox for confirming understanding. A callout box on the right explains that after reading the document, the user should check the box to confirm they understand how to use the portal.

Une fois que vous avez lu ce document, cochez la case pour confirmer que vous comprenez comment utiliser le portail.

Etape 02 - Contrats et factures

Cliquez le pdf et téléchargez le cahier des charges

The screenshot shows a Notion page titled "02. Contracts & Invoices" with sections for "Contract" and "Invoices". The "Contract" section includes a link to download and sign a contract PDF and a field to re-upload the signed contract. The "Invoices" section lists "50% non-refundable deposit invoice" and "50% remainder invoice" with upload fields. A "CONTRACT INFORMATION" section contains a checkbox for confirming the signed contract and first deposit invoice. A "NEXT STEPS" section includes checkboxes for confirming the signed contract, the first deposit invoice, and the final invoice. A callout box on the left explains that the user should click the PDF to download it, sign it, and re-upload it. A callout box on the right explains that the user should check the box to confirm.

Téléchargez la facture

Signez le contrat et re-téléversez le document PDF. Cliquez simplement sur 'Téléverser ou intégrer un fichier' et joignez le contrat signé..

Cochez la case pour confirmer

Project Dashboard

Etape 03- Questionnaire de Découverte

Veillez répondre à toutes les questions possibles sur cette page

03. Discovery Questionnaire

+ Add a property

A Add a comment...

Stage one: This questionnaire needs to be completed ASAP and before the Kick-off Strategy Call. Let's go a little more in-depth so I can get a better understanding about your business. If you're unsure on answering any questions, don't worry! We'll be diving deeper into the questions and answers together during the strategy session.

1. Describe your business and what it does in one simple sentence (this will help your audience understand exactly what your business does in a really simple way).
[Type '/' for commands]

NEXT STEPS

I (the client) have gone through and answered all the questions to my knowledge

Now head to the home page and read through the 'FAQs':

Il vous suffit de cliquer sur la boîte de question bleue et de saisir votre réponse.

Cochez la case une fois toutes les questions ont été répondues

Etape 04 - FAQ'S

Cliquez sur le triangle basculant pour voir la réponse

04. FAQs

FAQs

- ▶ How is payment taken?
- ▼ How many concepts will you create?
My process consists of the 'one concept method'. You will be presented with one in-depth concept. It's my job to find and present the best solution for your business and with the one concept method I can go in-depth and present a whole brand identity that doesn't leave you confused unlike showing several concepts.
- ▶ Can you help with design projects after the project is complete?
- ▶ What files will I receive?
- ▶ What is the Brand Guidelines Document?
- ▶ How many revisions do I get?

NEXT STEPS

You're up to date and have completed everything before we start the process (how exciting!! Keep an eye on the 'project presentations upload' page for the first presentation to be uploaded!

You can check the timeframe and progress of the project by clicking back to the homepage.

Toutes les étapes ont maintenant été complétées de votre part, prêtes pour le début du projet.

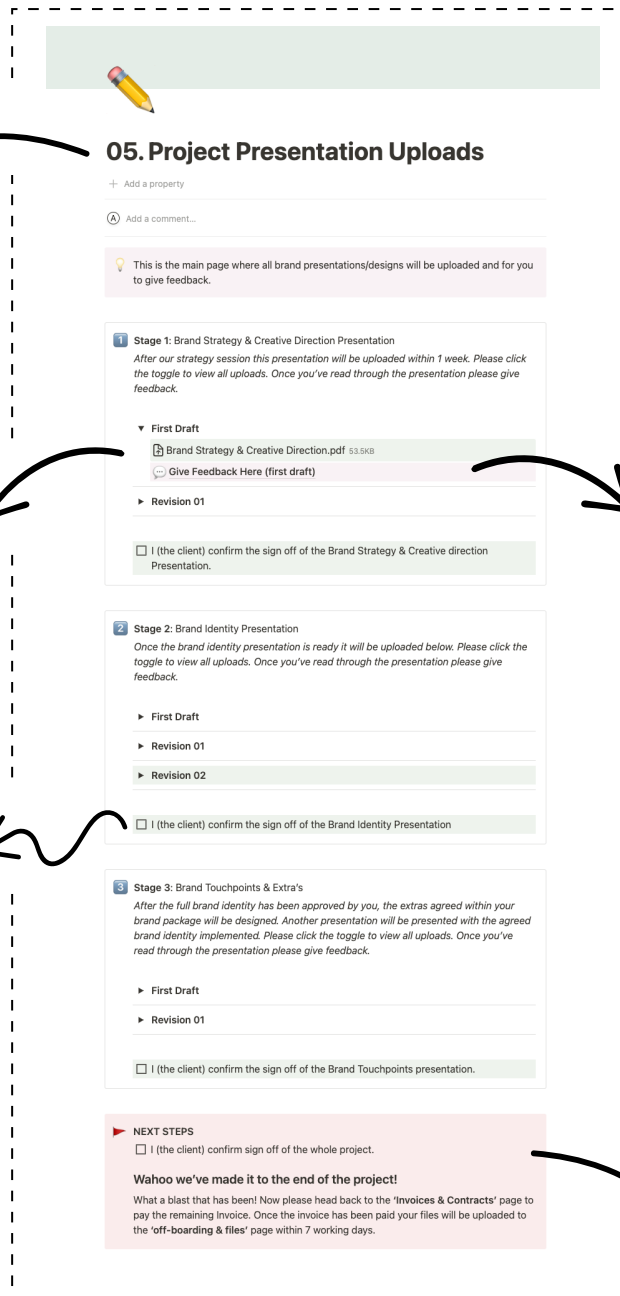
Project Dashboard

Step 05 - Project Presentation Uploads

C'est la page principale où toutes les présentations seront téléchargées pour donner des retours

À chaque étape, il y a un espace pour télécharger des présentations. Une fois que l'une a été téléchargée, cliquez sur le bascule et sur le fichier PDF pour visualiser la présentation.

Cochez la case pour confirmer votre approbation de la présentation après chaque étape.



05. Project Presentation Uploads

+ Add a property

🗨 Add a comment...

💡 This is the main page where all brand presentations/designs will be uploaded and for you to give feedback.

1 Stage 1: Brand Strategy & Creative Direction Presentation
After our strategy session this presentation will be uploaded within 1 week. Please click the toggle to view all uploads. Once you've read through the presentation please give feedback.

▼ First Draft

📄 Brand Strategy & Creative Direction.pdf 53.5KB

🗨 Give Feedback Here (first draft)

▶ Revision 01

I (the client) confirm the sign off of the Brand Strategy & Creative direction Presentation.

2 Stage 2: Brand Identity Presentation
Once the brand identity presentation is ready it will be uploaded below. Please click the toggle to view all uploads. Once you've read through the presentation please give feedback.

▶ First Draft

▶ Revision 01

▶ Revision 02

I (the client) confirm the sign off of the Brand Identity Presentation.

3 Stage 3: Brand Touchpoints & Extra's
After the full brand identity has been approved by you, the extras agreed within your brand package will be designed. Another presentation will be presented with the agreed brand identity implemented. Please click the toggle to view all uploads. Once you've read through the presentation please give feedback.

▶ First Draft

▶ Revision 01

I (the client) confirm the sign off of the Brand Touchpoints presentation.

NEXT STEPS

I (the client) confirm sign off of the whole project.

Wahoo we've made it to the end of the project!

What a blast that has been! Now please head back to the 'Invoices & Contracts' page to pay the remaining invoice. Once the invoice has been paid your files will be uploaded to the 'off-boarding & files' page within 7 working days.

Une fois que vous avez visionné la présentation pour l'étape, cliquez sur la boîte "Donner votre avis ici", qui vous dirigera vers une autre page avec des invitations pour le feedback.

Une fois que le projet est terminé, cochez la case pour confirmer votre approbation de l'ensemble du projet. Ensuite, rendez-vous sur la page de la facture pour télécharger la facture finale du projet.

Project Dashboard

Etape 06- Au revoir !

Une fois que le solde de la facture aura été réglé, Cliquez simplement sur le triangle basculant pour accéder à vos fichiers.

06. Offboarding, files & your review

+ Add a property

A Add a comment...

It's been an absolute pleasure bringing your vision and brand to life and being able to work with you! Once the remaining invoice has been paid your files will be uploaded below (within 7 working days). Click the toggles below for your files and other useful resources!

- > Your Files
- > Goodbye Packet
- > Font Licensing

★ YOUR REVIEW

Once again it's been an absolute pleasure bringing your vision and ideas to life. I'd love to hear your thoughts & feedback on the project plus what it was like working with me and my process! Please note your feedback may be used on our website and on social media.

Type something...

le site sera mis en ligne par me soins et une séance de formation sera offerte

N'oubliez pas de laisser des retours sur cette page concernant notre collaboration et le projet !

Étapes suivantes

C'est tout ! Vous savez comment utiliser et naviguer dans votre portail client !
Maintenant, rendez-vous sur Notion et commencez avec la prochaine étape. Si vous avez des questions supplémentaires sur le portail, n'hésitez pas à demander !

06. Offboarding, files & your review

en an absolute pleasure bringing your vision and brand to life and being able to work with you! Once the remaining invoice has been paid your files will be uploaded below (within 7 working days). Click the toggles below for your files and other useful resources!

Files

by Packet

Licensing

03. Discovery Questionnaire

+ Add a property

A Add a comment...

Stage one: This questionnaire needs to be completed ASAP and before the Kick-off Strategy Call. Let's go a little more in-depth so I can get a better understanding about your business. If you're unsure on answering any questions, don't worry! We'll be diving deeper into the questions and answers together during the strategy session.

1. Describe your business and what it does in one simple sentence (this will help your audience understand exactly what your business does in a really simple way).

Client Portal

Status **Complete**

Package	Brand Identity
Start Date	January 3, 2022
End Date	February 16, 2022
Last Edit	May 2, 2022 5:59 PM

1 more property

A Add a comment...

PROJECT TRACKER