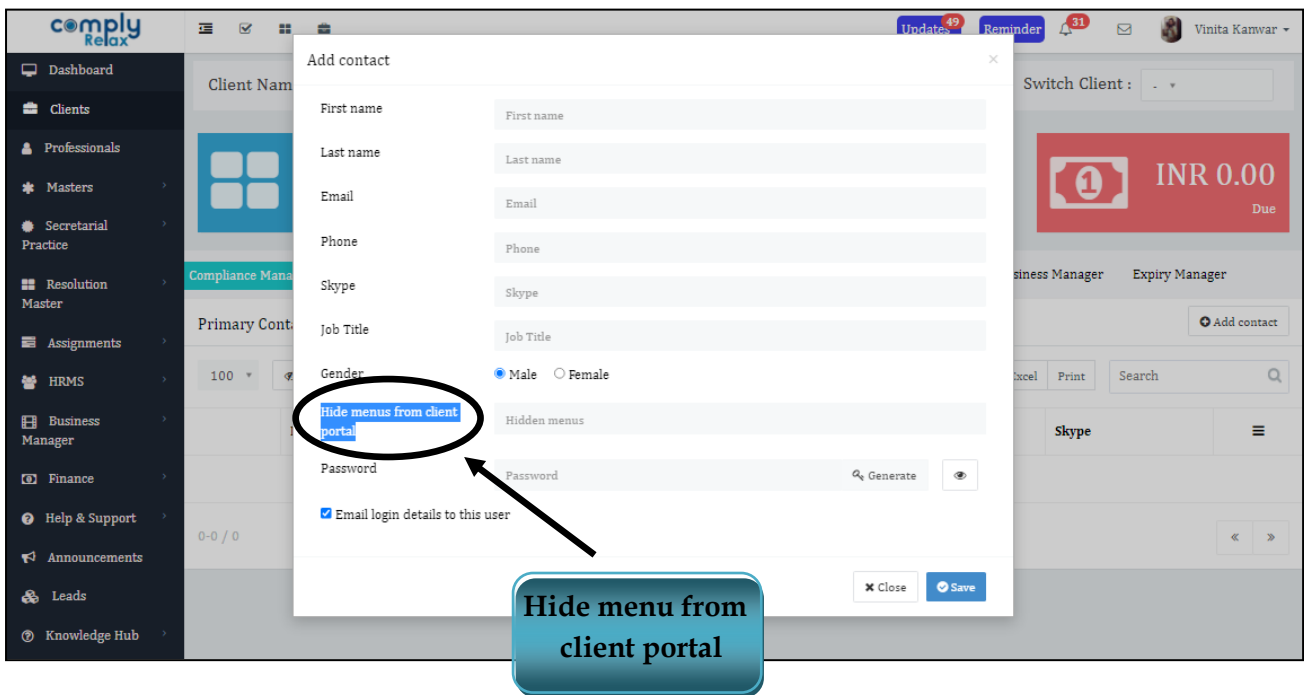*ComplyRelax's Updates*

Control over modules accessible to clients

You can now choose which module should be shown on client portal.

You can very easily hide the menu which you think should not be visible on the client portal.

Choosing menu while creating Client Portal:

Dashboard ⇨ Client ⇨ Client Name ⇨ Primary Contact ⇨Add Contact
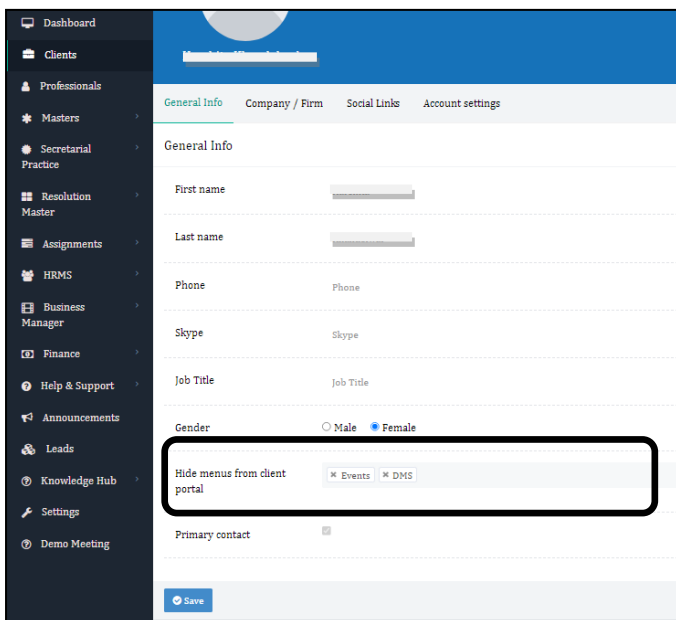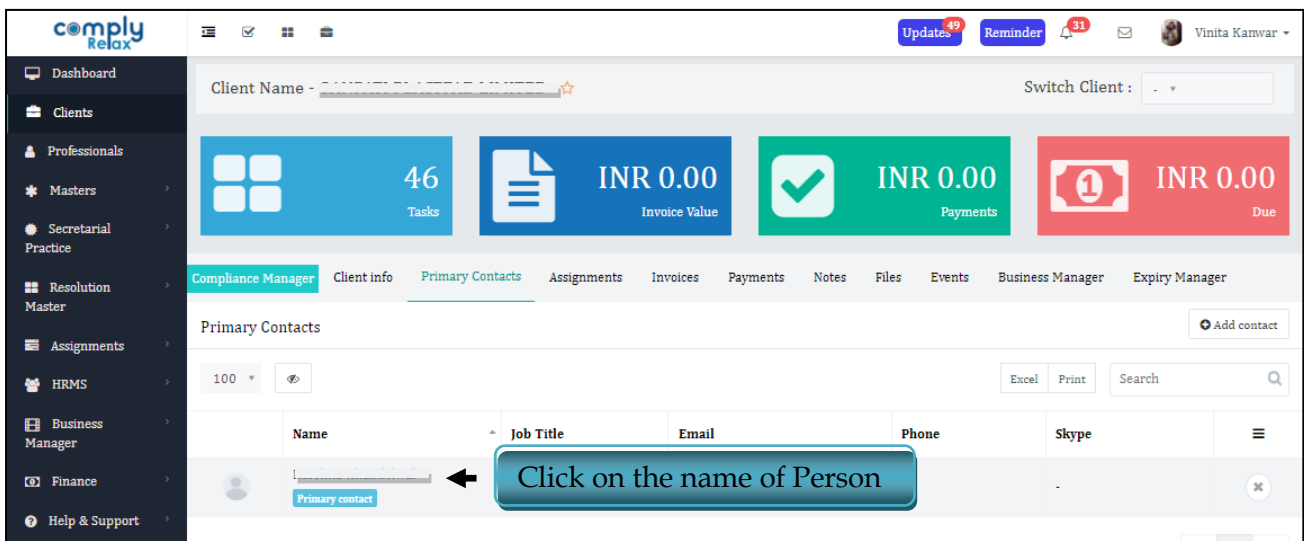

Hide menu from client portal

While adding the client, above shown dialogue box opens up.

As shown in the above figure, you can select the menu that you want to hide from client from the dropdown list.

Choosing menu after you have created Client Portal:

If you have already created a client portal, you can select the customized menu for that client as well.

Dashboard ⇨ Client ⇨ Client Name ⇨ Primary Contact ⇨ Name

Click on the name of Person

After clicking on the name, this window will be displayed. You can select the menu that you want to hide from the option as shown in the image and save.