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

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Dashboard	Client Nam	Add contact		×	Switch Client -
Clients	Chefit Nam	First name	First name		
Professionals		Last name	Last name		
🔹 Masters 💦 👌		Email	Email		1 INR 0.00
Secretarial > Practice		Phone	21		Due
Resolution >	Compliance Mana	Clame	rnone		siness Manager Expiry Manager
Master	Primary Cont	зкуре	Skype		• Add contact
🖬 Assignments 💛	T Timary Conta	Job Title	Job Title		
👹 HRMS 💦 👌	100 * 🧖	Gender	● Male ○ Female		xcel Print Search Q
Business) Manager	1	Hide menus from client	Hidden menus		Skype =
Finance >		Password	Password	& Generate	
😮 Help & Support 🔅		☑ Email login details to this u	iser		
📢 Announcements	0-0 / 0				« »
🚓 Leads			Hide menu from	X Close Save	
⑦ Knowledge Hub →			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.

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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

comply		Updates ⁹⁹ Reminder 4 ³³ 🖂 🌒 Vinita Kanwar 🗸
🖵 Dashboard	Client Name	Switch Client : •
🚔 Clients		
Professionals		
* Masters >		INR 0.00 Payments Due
Secretarial > Practice		
Resolution > .	Compliance Manager Client info Primary Contacts Assignments Invoices Payments Notes	Files Events Business Manager Expiry Manager
Resolution	Compliance Manager Client info Primary Contacts Assignments Invoices Payments Notes Primary Contacts	Files Events Business Manager Expiry Manager 🗘 Add contact
 Resolution Master Assignments 	Compliance Manager Client info Primary Contacts Assignments Invoices Payments Notes Primary Contacts	Files Events Business Manager Expiry Manager
 Resolution → Master Assignments → HRMS → 	Compliance Manager Client info Primary Contacts Assignments Invoices Payments Notes Primary Contacts 100 * % 100 <th>Files Events Business Manager Expiry Manager OAdd contact Excel Print Search Q</th>	Files Events Business Manager Expiry Manager OAdd contact Excel Print Search Q
 Resolution → Master Assignments → HRMS → Business → 	Compliance Manager Client info Primary Contacts Assignments Invoices Payments Notes Primary Contacts 100 * Image: Client info Image: Client info </th <th>Files Events Business Manager Expiry Manager Add contact Excel Print Search Q Phone Skrme =</th>	Files Events Business Manager Expiry Manager Add contact Excel Print Search Q Phone Skrme =
 ■ Resolution Master ■ Assignments > ● HRMS > ■ Business > Manager 	Compliance Manager Client info Primary Contacts Assignments Invoices Payments Notes Primary Contacts 100 * Image: Client info Image: Client info </th <th>Files Events Business Manager Expiry Manager Add contact Excel Print Search Q Phone Skype E</th>	Files Events Business Manager Expiry Manager Add contact Excel Print Search Q Phone Skype E
 Resolution Master Assignments HRMS Business Manager Finance 	Compliance Manager Client info Primary Contacts Assignments Invoices Payments Notes Primary Contacts IOO Name Job Title Email Click on the name of Pers Primary contact	Files Events Business Manager Expiry Manager • Add contact • Add contact • Add contact • Phone • Skype • • Non • • • •

Dashboard	
🚔 Clients	
Professionals	General Info Company / Firm Social Links Account settings
🗰 Masters 💦 👌	
Secretarial > Practice	General Info
Resolution · · · · · · · · · · · · · · · · · · ·	First name
Assignments	Last name
😁 HRMS 🔿	Phone Phone
🗄 Business 💛 Manager	Skype Skype
Finance	
🕜 Help & Support 🔿	Job Title Job Title
📢 Announcements	Gender O Male 🖲 Female
🗞 Leads	
⑦ Knowledge Hub →	Hide menus from client × Events × DMS portal
🗲 Settings	
⑦ Demo Meeting	Primary contact
	© Save

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.

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