

A cluster of overlapping, faceted geometric shapes in shades of yellow, green, and blue, located in the top-left corner of the slide.

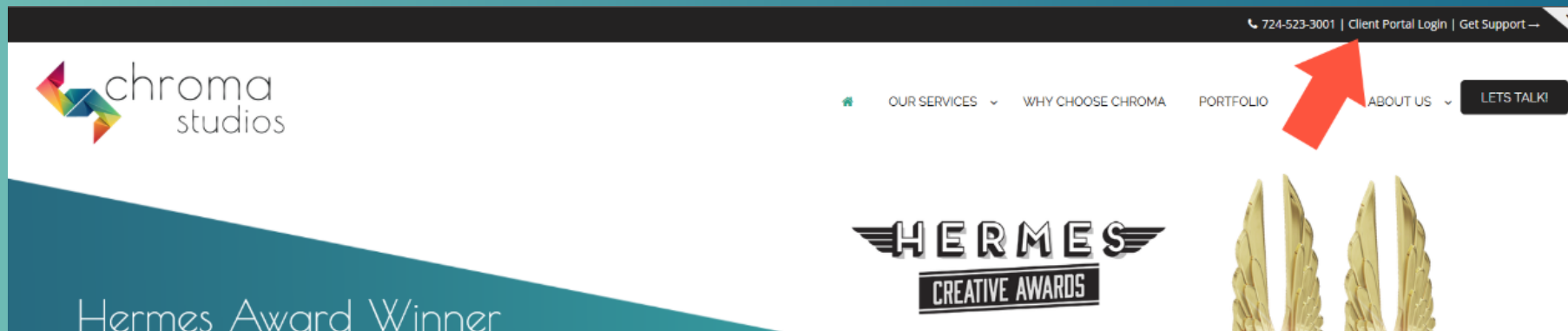
# Chroma Portal

Customer Login & Access



Visit Chroma-Marketing.com

Click the Client Portal Login link in the Action Bar



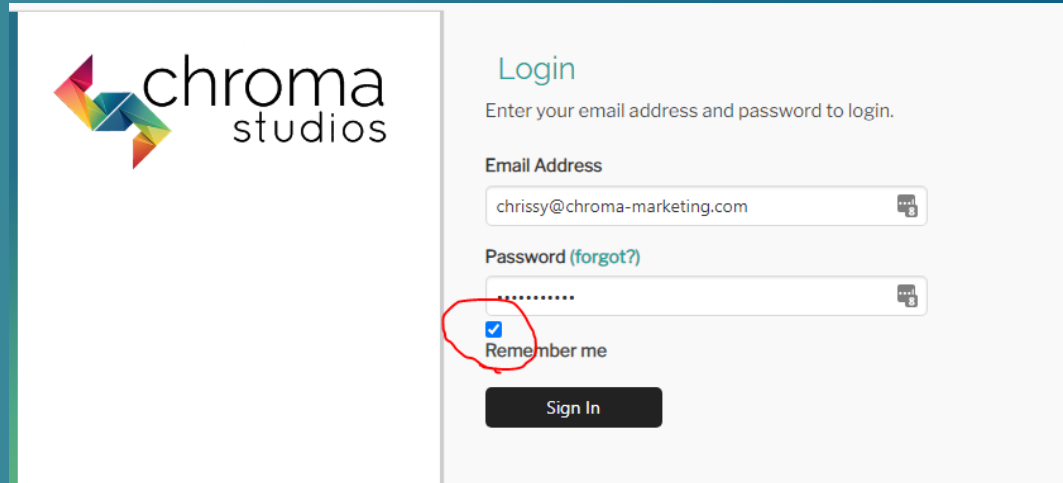
Or go directly to <http://customers.chroma-marketing.com> to be directed to the correct page.




Enter your email address and password.

Click Remember me to stay logged in after you close the window.

NOTE: Even if you choose "Remember me", you will sometimes need to login again.



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Login  
Enter your email address and password to login.

Email Address  
chrissy@chroma-marketing.com

Password (forgot?)  
.....

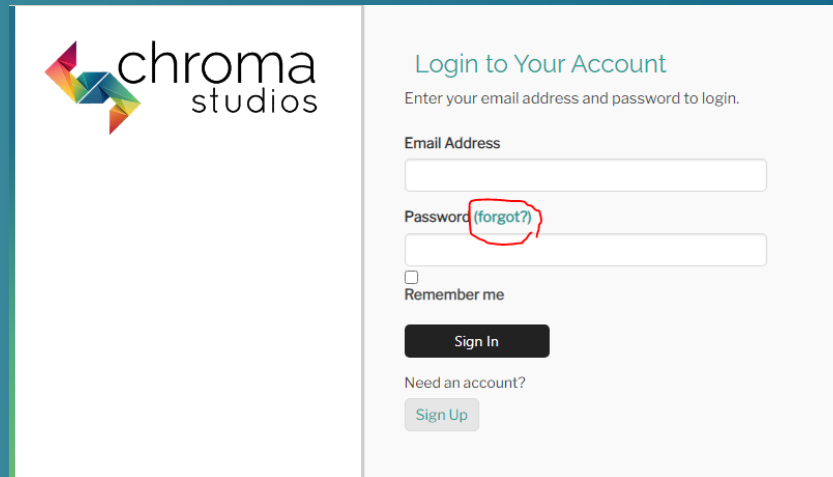
Remember me

Sign In



If you don't know your password, click the "forgot" link.

Enter the email address associated with the login and Submit. We'll send a password reset link to your email



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### Login to Your Account

Enter your email address and password to login.

Email Address

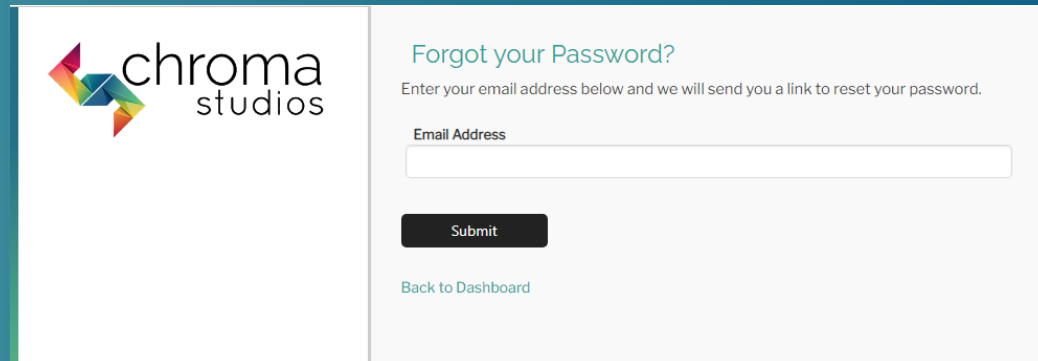
Password (forgot?)

Remember me

Sign In

Need an account?

Sign Up



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### Forgot your Password?

Enter your email address below and we will send you a link to reset your password.

Email Address


Submit


[Back to Dashboard](#)





# What Can You Do in the Portal?


- Help Desk
  - Create tickets for changes to your website or email
  - View ticket status
- Account settings (email address and password update)
- Dashboard
  - View contact information, Services and Subscriptions
- Projects
  - View your current projects and proposal.
- Approvals
  - Mark approvals and provide feedback on current projects.
- Invoices
  - See your open and paid invoices
  - Set up convenient Auto Payments
- Remove Authorized Users


 Dashboard

 Help Desk

 Your Projects

 Your Approvals

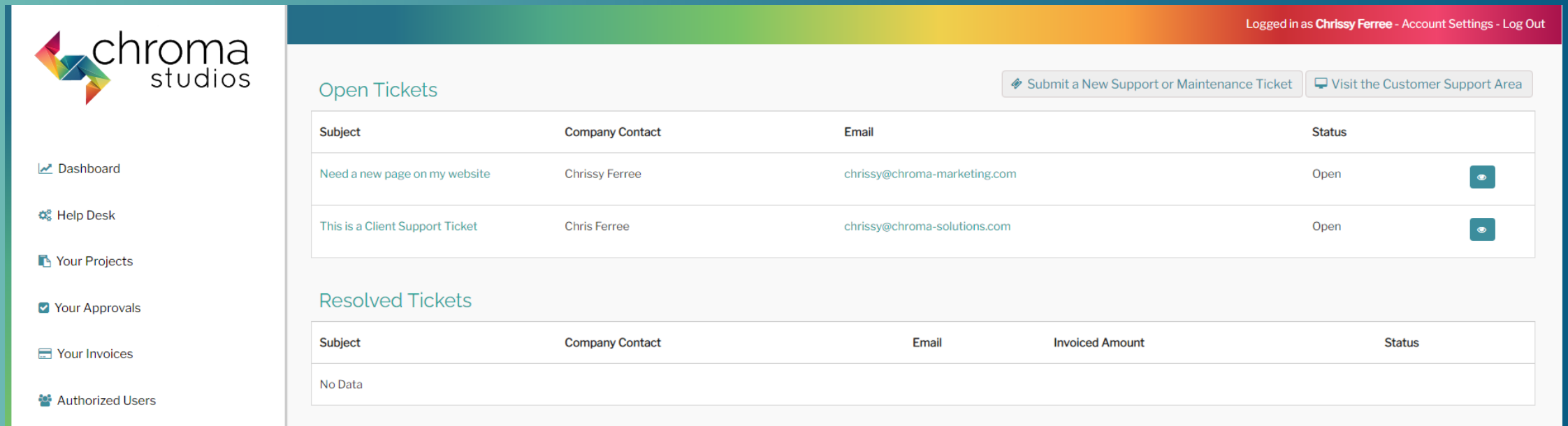
 Your Invoices

 Authorized Users



# View Tickets in Help Desk



- Go to the Help Desk
- Dashboard displays Open Tickets and Resolved Tickets
- Click a ticket to see details.



The screenshot shows the Chroma Studios Help Desk dashboard. The top navigation bar is orange and displays "Logged in as Chrissy Ferree - Account Settings - Log Out". The left sidebar contains navigation links: Dashboard, Help Desk, Your Projects, Your Approvals, Your Invoices, and Authorized Users. The main content area is divided into two sections: "Open Tickets" and "Resolved Tickets".

**Open Tickets**

[Submit a New Support or Maintenance Ticket](#) [Visit the Customer Support Area](#)

Subject	Company Contact	Email	Status
Need a new page on my website	Chrissy Ferree	chrissy@chroma-marketing.com	Open 
This is a Client Support Ticket	Chris Ferree	chrissy@chroma-solutions.com	Open 

**Resolved Tickets**

Subject	Company Contact	Email	Invoiced Amount	Status
No Data				



# Enter Tickets in Help Desk

- Go to the Help Desk
- Click Submit a New Support or Maintenance Ticket

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Dashboard

Help Desk

Your Projects

Your Approvals

Open Tickets

Submit a New Support or Maintenance Ticket

Visit the Customer Support Area

Subject

No Data

Resolved Tickets

Subject	Company Contact	Email	Invoiced Amount	Status
No Data				



# Enter Tickets in Help Desk

- Complete the information
  - Provide a descriptive subject
  - Choose your company (most people only have 1 company)
  - Enter your email
  - Enter the website URL
  - Thorough describe your request.
  - Attached your images or files.
    - NOTE there are 3 upload positions for images and 3 for files.
    - Zipped files are counted as files even if they contain images.
  - If you have more files, request a Dropbox link.
- Click Submit

The screenshot shows the 'Add Ticket' form with the following fields and annotations:

- Subject \***: Text input with 'Need a new page on my website' and a lock icon.
- Company**: Dropdown menu with 'Chroma Client' selected.
- Email**: Text input with 'chrissey@chroma-marketing.com'.
- Website**: Text input with 'chromastud.io'.
- Client Priority \***: Dropdown menu with 'Medium' selected.
- Request**: Rich text editor with the text: 'Please add a new page to my website. I'd like it to go on the menu between the Blog and About pages. Call the page News. Add this attached information See attached document. I don't have a picture, see if you can find a stock image.' A red arrow points to the text with the label 'Enter your description'. A red box highlights the text: 'PROVIDE as much detail as you can. You can add up to three images and three documents. If you need to send more, please ask for a dropbox link.'
- Documents**: Section with 'doc,pdf,zip,excel,csv' and a red arrow pointing to the text 'Documents here'.
- File Upload**: Three upload slots labeled 'File 1', 'File 2', and 'File 3', each with a 'Browse...' button and 'No file selected.' text.
- Images**: Three upload slots labeled 'Image 1', 'Image 2', and 'Image 3', each with a 'Browse...' button and 'No file selected.' text. A red arrow points to the text 'Images here. If you need to upload more, ask us for a dropbox link.'
- Submit**: A dark button at the bottom with the text 'Submit'. A red arrow points to the text 'Once you've reviewed your data and uploads, then submit.'





# Account Settings

## Accessible from Portal Action Bar

Change email address  
Change Password

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- Dashboard
- Help Desk
- Your Projects
- Your Approvals
- Your Invoices
- Authorized Users

Account Settings

Name \*

Chrissy Ferree

Email \*

chrissy@chroma-marketing.com

Submit

Change Password

Password \*

Current Password

New Password \*

Password

Confirm Password

Logged in as **Chrissy Ferree** - Account Settings - Log Out



# Dashboard

## View

- Address and Contact Info
- Your Services
- Your Subscriptions
  - Website hosting
  - Email hosting
  - WordPress Updates
  - Flex Portal Subscription

NOTE: You won't see everything listed – only those services or subscriptions that apply to your account.

The screenshot displays the Chroma Client dashboard. At the top, it shows the user is logged in as Chrissy Ferree and provides links for Account Settings and Log Out. A promotional banner offers to buy blocks of prepaid hours at last year's rate. The main content is organized into several sections:

- Client Information:** Includes the Chroma Client logo, website (www.chromastudio), phone (724-523-3001), address (516 Lowry Avenue, Jeannette, Pennsylvania 15644), and billing email (chrissy@chroma-solutions.com). There is an "Edit Client Details" button and a "Please Check the Status of Your Invoices & Subscriptions" warning.
- Your Services:** A grid of service cards, each with an icon, service name, provider (chroma-marketing.com), status (\$0.00 Monthly - Active), and a "view" button.
  - Content Writing for Chroma Client
  - PPC for Chroma Client
  - SEO for Chroma Client
  - Social Media for Chroma Client
- Your Subscriptions:** A grid of subscription cards, each with an icon, subscription name, provider, details, status, and a "view" button.
  - Email for Chroma Client (Office 365 Business Standard)
  - FlexPortal Subscription for Chroma Client (Portal Access - Unlimited Users)
  - Hosting for Chroma Client (ChromaStudio)
  - Hosting for Chroma Client (ChromaStudio)
  - Wordpress Updates for Chroma Client (Plugin and Theme Updates)

A sidebar on the left contains navigation links: Dashboard, Help Desk, Your Projects, Your Approvals, Your Invoices, and Authorized Users. A "NONPROFIT ORGANIZATION" badge is visible in the top right corner.



# View Projects

- Go to My Projects to see a list of Current Projects
- See
  - List of projects
  - Start and Launch Dates
  - Budget
  - Additional costs
  - Status
  - Dropbox link
  - Staging site info
  - Link to proposal

The screenshot displays the Chroma Studios dashboard. On the left is a navigation sidebar with the following items: Dashboard, Help Desk, Your Projects, Your Approvals, Your Invoices, and Authorized Users. The main content area is titled 'Website Projects' and includes a note: 'If your project is ready for review, please visit Your Approvals to the left.' Below this, a project card for 'Chroma Client | KCPO Document Manager Site' is shown. The card is divided into two columns. The left column lists project details: 'chroma-marketing.com', 'Start Date' (08/31/2021), 'Projected Launch Date' (02/18/2022), 'Budget' (\$0.00), 'Stock Image Total' (\$0.00), 'Additional Customer Costs' (\$99.00), and 'Theme License'. The right column shows 'Project Status' as 'Development in Progress' and lists 'DropBox Link', 'Staging Site' (test@test.com), 'Username' (flywheel), and 'Password' (RedDog123). A 'Proposal' link is also present, pointing to 'websiteprojectproposalforchromaclient.pdf'. Below the project card is a 'Request a New Design Project' button. At the bottom, a 'Design Projects' table is displayed with the following data:

Project Name	Type of Design	Designer	Printing Cost	Status	Project Status
Chroma Spin-to-win PC	Post Card		\$0.00	Completed Project	Project Delivered
Spin to win post card	Post Card		\$0.00	Completed Project	Queued



# View Your Approvals

- Go to My Approvals to see a list of Approvals
- Click on a project to see details

The screenshot shows a web browser at the URL `client-portal.knack.com/chroma-studios#tasks/`. The page is titled "Approvals" and is logged in as "Chrissy Ferree". The left sidebar contains the following navigation items: Dashboard, Help Desk, Your Projects, Your Approvals (highlighted with a red arrow), Your Invoices, and Authorized Users. The main content area displays two approval cards:

- Website Approval: Please Review & Provide Feedback**  
Chroma Client | Document Manager Site  
Please visit your staging site and review for feedback and changes. For speed and ease of implementing your feedback, please submit your comments, requests, and feedback document all at once via the button below. This will help us easily incorporate your changes in an organized way. As always, if you have any questions, please let me know. If you would like a call to discuss your changes, please indicate that when submitting your feedback. Thank you!  
Complete Approval or Submit Feedback  
Username: flywheel Password: RedDog123  
Staging Site: <https://test.flywheelstos.com>
- Approval Needed for Content**  
Content Writing for Chroma Client  
Date Sent: 01/08/2022  
Here is an approval for monthly content.  
Complete Approval or Submit Feedback  
Document for Review: [sow8prescriptionandquarterly.pdf](#)



# Approvals

- Click the Complete Approval or Submit Feedback Button
- View the project (document or website) and collect your feedback.
- Click the approval or feedback checkbox.
- Provide your notes or upload your Feedback document.
- Click the Submit button

client-portal.knack.com/chroma-studios#tasks/edit-approval/61da13718f644c001eb07d6f/

Apps Bookmarks Reference Wikipedia FAY FB FogBugz IMDb Netflix Pin It SP.KCPO WIKI PODIO SF - Magazine CME-GDS DreamForge SF Fandom DF of Interest Mail

chroma studios

Your Approvals Edit Approval Logged in as Chris

## Approval Needed for Content

Out for Approval

Content Writing for Chroma Client

Document: [sow8prescriptionandquarterly.pdf](#)

If you are ready to approve, please click the checkbox below and submit. If you have feedback, please either type your thoughts/changes into the box below, or upload 1 Word or PDF document with you would like a call to discuss your changes, please indicate that while submitting your feedback. As always, if you have any questions or concerns, please let us know.

Approval  This is Approved  
 I Would Like to Submit Changes/Feedback

Feedback Document  
Choose File No file chosen

Submit

Back to Your Approvals

Notes/Comments

Write notes here, or upload a feedback document.



# Invoices

- View your open and unpaid invoices.

NOTE: Use the button in the top corner to Request Auto Pay.

If we have your CC on file, invoices will be automatically charged. If we don't have your card on file, you'll receive an email with a link to enter the information.

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Dashboard

Help Desk

Your Projects

Your Approvals

Your Invoices

Authorized Users

Logged in as **Chrissy Ferree** - Account Settings - Log Out

Request Auto Pay

### My Invoices

Invoice #	Due Date	Amount	Description	Status	Auto Pay Enabled
8457038945	01/07/2022	\$35.00		Open	✘

Pay Now

### Paid Invoices

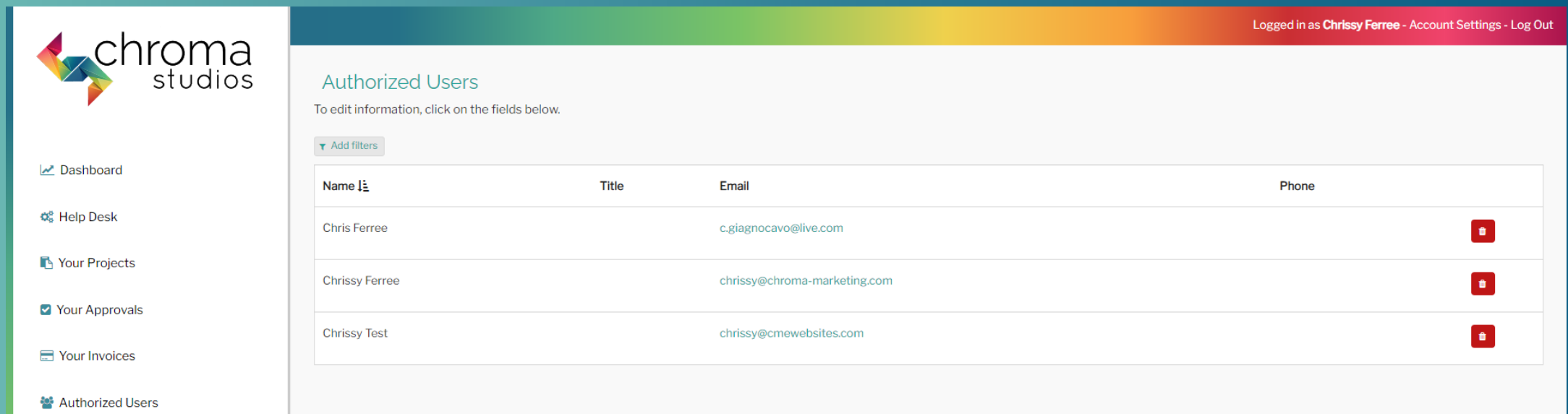
Invoice #

No data






# Authorized Users

- View authorized users on your account
- Use the Delete icon to remove users that are no longer at your company.
- If you want to add a new user, provide us a name and email address and we'll send an invitation.



The screenshot shows the 'Authorized Users' page in the Chroma Studios dashboard. The page is titled 'Authorized Users' and includes a sub-header 'To edit information, click on the fields below.' Below this is a table with columns for Name, Title, Email, and Phone. There are three users listed, each with a red delete icon in the Phone column. The user 'Chris Ferree' has the email 'c.giagnocavo@live.com'. 'Chrissy Ferree' has the email 'chrissy@chroma-marketing.com'. 'Chrissy Test' has the email 'chrissy@cmewebsites.com'. The dashboard sidebar on the left contains navigation links for Dashboard, Help Desk, Your Projects, Your Approvals, Your Invoices, and Authorized Users. The top right corner of the dashboard indicates the user is logged in as 'Chrissy Ferree' and provides links for 'Account Settings' and 'Log Out'.

Name	Title	Email	Phone
Chris Ferree		c.giagnocavo@live.com	
Chrissy Ferree		chrissy@chroma-marketing.com	
Chrissy Test		chrissy@cmewebsites.com	





chroma  
marketing essentials

724-523-3001

Visit: [www.chroma-marketing.com](http://www.chroma-marketing.com)

Emai: [info@chroma-marketing.com](mailto:info@chroma-marketing.com)

