

CLIENT PORTAL

A CLIENT GUIDE

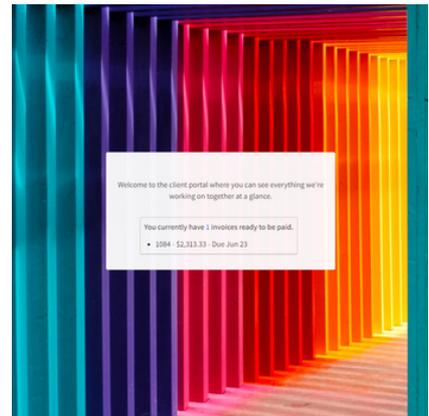
WHAT IS CLIENT PORTAL?

Welcome to Hectic's client portal. Think of Hectic as a virtual assistant to the freelancer you are working with, without the back and forth emails. This quick guide will walk you through using Hectic's client portal. No Hectic account required, just an internet connection.

ACCESS YOUR PORTAL

Once you've been granted access, you'll receive a magic link in your email to get you signed in to see the work you are doing together. You will stay logged in for up to 7 days (or until you click log out) at which point, you would repeat the magic link process.

Bookmark the link to your personal client portal for easy access whenever you need it.



FEATURES

Invoices

Invoice list, reports, ACH accounts, subscriptions

View a full history of invoices with its current status as paid, pending, or late. Click any invoice to view it. In reports, see an overview of your shared finances. See totals, deposits, and the average days it takes to pay. Link a US bank account and enable ACH payments.

Subscriptions: Subscriptions are based on products or services that have prices and billing intervals. This allows your subscriptions (such as web hosting services) to automatically bill a credit card at the beginning of a period.

Time worked

Time entries, reports

A list of time spent including notes on projects and/or deliverables that were worked on.

Projects

Here you'll see an overview of each of the projects you are working on together. See how much has been invoiced against what has been paid, as well as any projects that are ready for your approval. You can also view how many hours were estimated per project against the actual time tracked to a project.

Agreements

View past quotes, proposals, and contracts, as well as any that are ready for your review and signature for future work together.

Meetings

If the freelancer has opted to include meetings, you can schedule a meeting using this function. It will give you options for times that the freelancer has marked as available. View past booked meetings here as well.