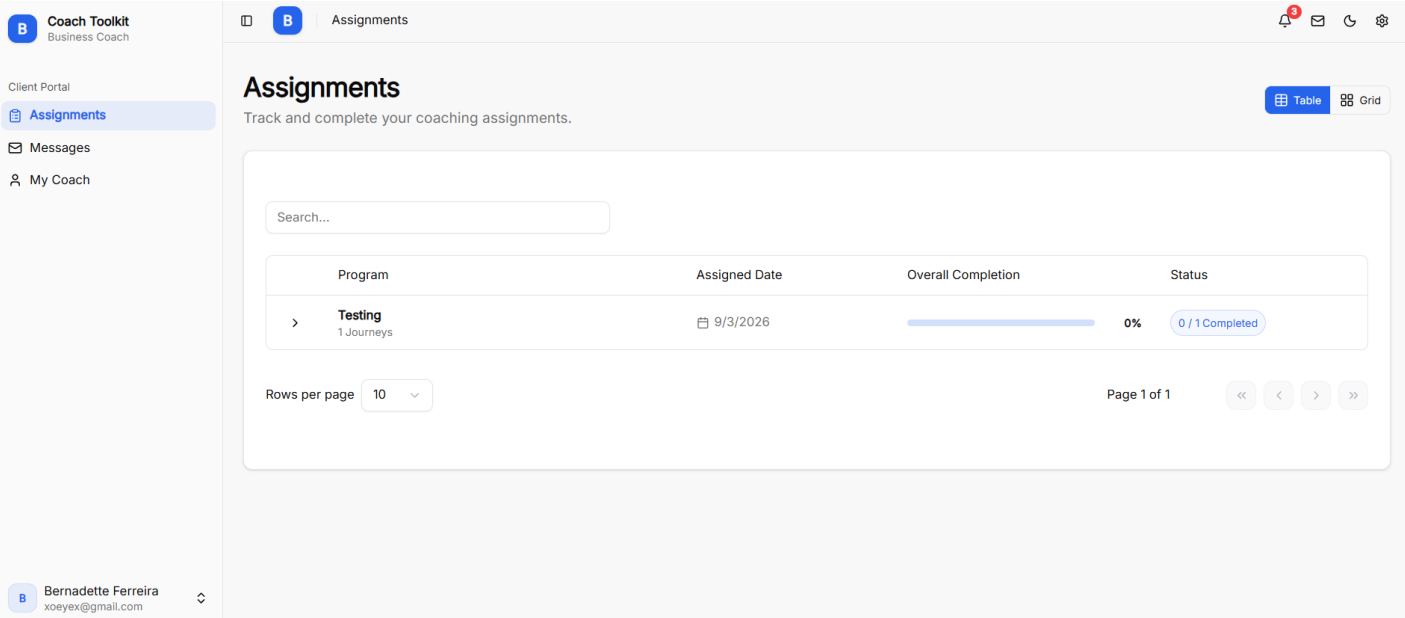


Mentor Alliance Business Coach Kit – Client Portal

Mentor Alliance Business Coach Kit – Client Portal: Dashboard & Assignments



The **Dashboard** (Assignments) view serves as the main hub when a client logs into the Client Portal, providing an overview of assigned coaching programs, completion rates, and account navigation.

Client Portal Navigation

- **Assignments:** Main dashboard showing assigned programs, overall completion, and active tasks.
- **Messages:** Chat hub for direct communication with the assigned business coach.
- **My Coach:** Dedicated page displaying the coach's contact info, bio, and profile.

Dashboard Features & Program Tracking

- **Layout View:** Toggle between **Table** and **Grid** views to customize how programs are displayed.
- **Program Search:** Search bar to locate specific assigned coaching programs.
- **Program Details:**
 - **Program Name:** Shows the title of assigned plans (e.g., *Testing*) and total journey count (e.g., *1 Journeys*).
 - **Assigned Date:** Displays the exact date the coach assigned the program.
 - **Overall Completion:** Progress bar rendering total completed percentage.
 - **Status Badge:** Tracks finished milestones (e.g., *0 / 1 Completed*).

Client Portal: Messages

Messages

Communicate directly with your coach.



Bernadette.F
Bernadette Coaching

No messages yet. Send a message to start the conversation!

 Send

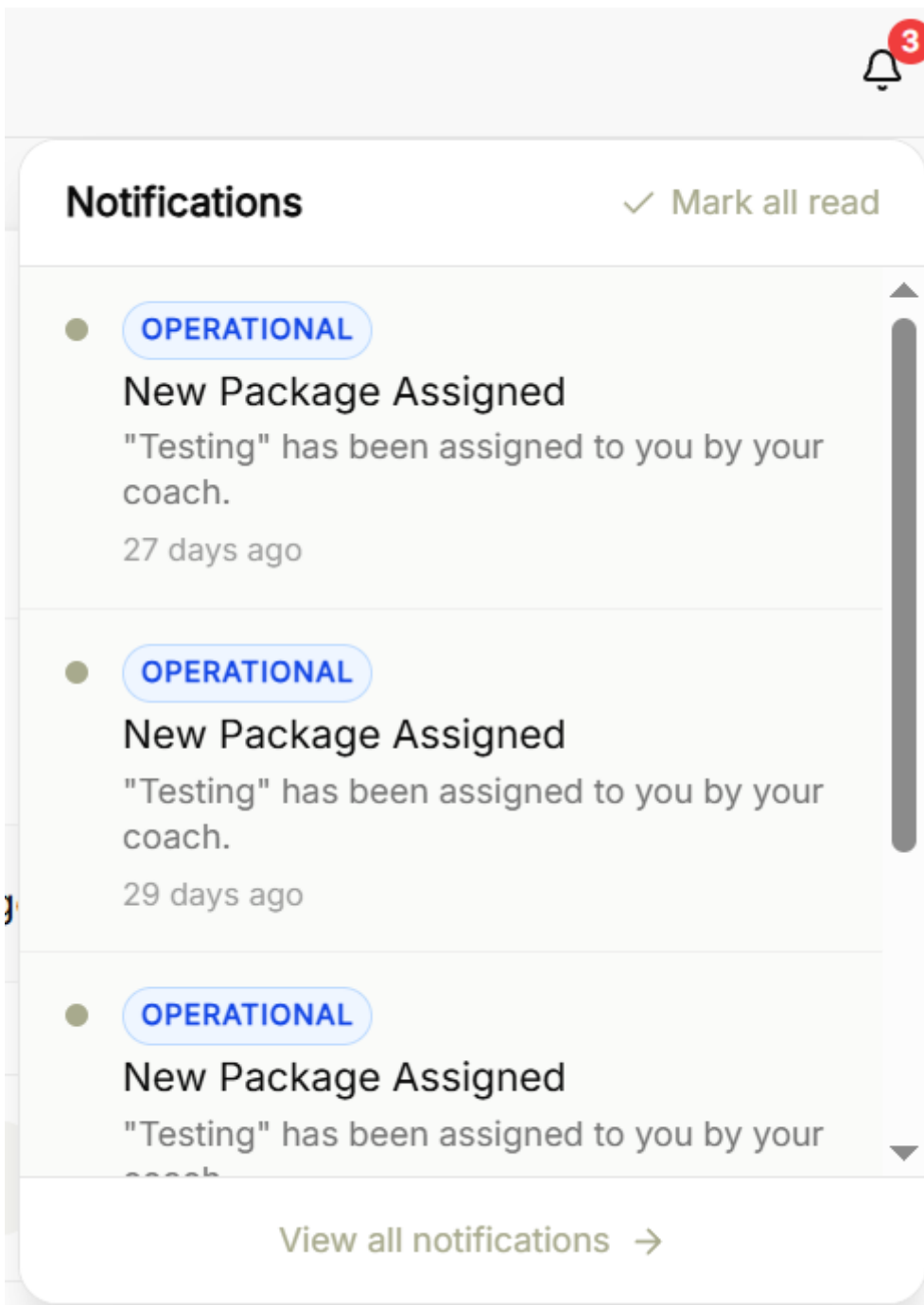
The **Messages** screen in the Client Portal provides a direct chat interface for clients to communicate with their assigned business coach.

Client Messages Workspace

- **Header & Purpose:** Clearly titled **Messages** with the subtext "*Communicate directly with your coach*".
- **Coach Profile Info:** Displays the assigned coach's name (e.g., *Bernadette.F*) and coaching practice title (e.g., *Bernadette Coaching*) along with their profile avatar.
- **Conversation Pane:** Main chat window showing conversation history or a starting placeholder ("*No messages yet. Send a message to start the conversation!*").
- **Message Controls:** Includes a text input box ("*Type your message...*") and a **Send** button to post direct updates, questions, or feedback.

Client Portal: Notifications

The **Notifications** panel in the Client Portal gives clients real-time updates regarding new package assignments, coaching plan updates, and operational activity.



Notifications Panel

- **Header Controls:**

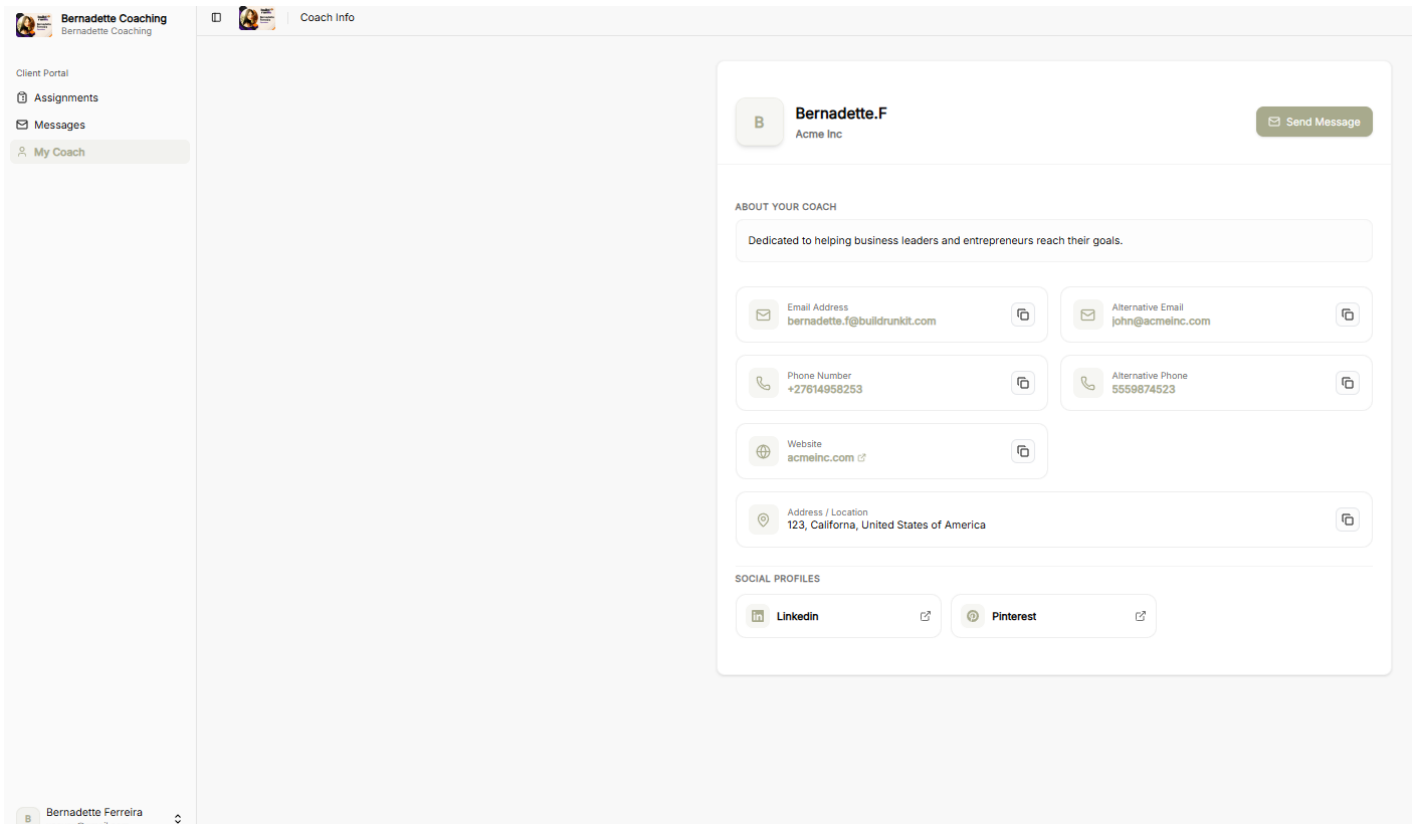
- **Notification Bell Icon:** Features a counter badge indicating total unread alerts.
- **Mark All Read:** Allows clients to clear all unread alert indicators with a single click.

- **Alert Feed:**

- **Category Badges:** Categorizes alerts with operational tags.
- **Alert Details:** Displays system notifications, such as new coaching package assignments from the coach.
- **Time Stamps:** Shows elapsed time since each alert was issued.

- **Navigation:** Includes a **View all notifications** option to access the complete notifications page.

Client Portal: My Coach



The **My Coach** screen provides clients with a clear overview of their assigned coach's public profile, business branding, and direct communication channels.

Coach Profile Header

- **Coach & Organization:** Shows the coach's full name and company branding alongside their profile avatar.
- **Send Message:** Prominent button allowing clients to initiate a direct message thread immediately.

About Your Coach

- **Coach Bio:** Displays a concise summary of the coach's background and core coaching approach.

Contact Information

- **Email Details:** Lists primary and alternative email addresses, complete with single-click copy buttons.
- **Phone Contact:** Displays primary and alternative contact numbers, paired with copy buttons.
- **Website:** Provides a direct external link to the coach's site with quick-copy functionality.
- **Office Location:** Displays the physical business or mailing address.

Social Profiles

- **External Links:** Buttons offering direct access to the coach's external social media profiles.

Client Portal: Account Settings

The **Account Settings** view allows clients to manage personal profile details, update security credentials, configure notification triggers, and customize portal display preferences.

User Settings

Account Settings

Manage your profile, security credentials, and system preferences.



User Settings

Update your personal contact information and social profiles.

Display Name

Bernadette Ferreira

Phone Number



+1 (555) 000-0000

Email Address

xocycx@gmail.com

Changing your email will send a confirmation link to your new address. Please check your inbox to confirm.

Social Profiles

Add, edit, or remove your social media links.

+ Add Social Link

No social links added yet. Click "Add Social Link" above to add one.

Save User Settings



Reset Password

Update your account password for enhanced security.

Current Password

Password

Enter current password



New Password

Password

Enter new password (min. 6 characters)



Confirm New Password

Password

Re-enter new password



Update Password

- **Contact Information:** Update personal details, including display name, phone number, and email address. Updating the email address sends a confirmation link to the new address.
- **Social Profiles:** Add, edit, or remove social media profile links.
- **Save Changes:** Apply updated account details using the **Save User Settings** button.

Reset Password

- **Credential Management:** Update account security credentials by entering the current password alongside a new password.
- **Password Confirmation:** Re-enter the new password to confirm accuracy.
- **Update Security:** Apply changes via the **Update Password** button.

Notification Preferences



Notification Preferences

Manage your notification channels, daily digest, and email alerts.

Notification Email

Override your account email address for receiving notifications.

e.g. notifications@yourdomain.com

Email Preferences

Daily Digest Email

Receive a daily digest email of non-urgent notifications at midnight UTC.

Marketing & Newsletters

Receive occasional updates, offers, and announcements.

Feature Updates

Stay notified about new platform features and improvements.

Upcoming Due Date Lead Times

Specify how many days prior to a due date notifications should trigger.

Task Due Lead (Days)

Days before task due date to notify

1

Deal Close Lead (Days)

Days before deal expected close date to notify

3

Invoice Due Lead (Days)

Days before invoice due date to notify

2

Project Task Lead (Days)

Days before project task due date to notify

1

Milestone Lead (Days)

Days before milestone target date to notify

7

Project Deadline Lead (Days)

Days before overall project completion date to notify

3

Stakeholder Tasks Lead (Days)

Days before stakeholder tasks due date to notify

3

Stakeholder Problem Lead (Days)

Days before stakeholder problem resolution due date to notify

3

Save Preferences



Theme & Language Preferences

Customize your visual appearance and language settings.

 Appearance Theme

Switch between light and dark visual themes.

 Display Language

Select your preferred application language.

☒ English

Use the interface in English.

☐ Español

Usar la interfaz en español.

- **Custom Notification Email:** Set a specific email address to override default account notification routing.
- **Email Preferences:** Toggle options for daily digest emails, marketing updates, and feature announcements.

- **Due Date Lead Times:** Specify lead days for automated task, project, invoice, and milestone reminder alerts.
- **Save Preferences:** Confirm updated notification settings with the **Save Preferences** button.

Theme & Language Preferences

- **Appearance Theme:** Switch between light and dark visual modes.
- **Display Language:** Select preferred application interface language.

Revision #1

Created 2026-09-30 12:23:00 UTC by Bernadette F

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