

# Best Practices: Client Center Adoption

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**ORBITAL24**  
Fall Forum

Ad  Orbit

# Why Use the Client Center?

Provides a way for your Advertising and Agency clients to interact with you via a portal

## Your clients can:

- Sign Contracts
- Upload Artwork
- Approve Proofs
- View Tearsheets
- Pay for Invoices
- View Statements
- Reporting Links
- And More!

**All within a single portal**



# Why Use the Client Center?

Ad Orbit Makes it Easy!

## You can:

- Customize your Client Center Design
- Manage your Client Permissions
- Provide Easy Access with Barrier Free Links
- Allow Agencies to Access Multiple Accounts
- Promote Adoption with System Emails



# Client Center Design

**ORBITAL24** [Register](#) | [Login](#)

link 1 > link 2 > link 3 > page

Example Home Message

Currently viewing data for Example Company [Switch Company](#)

### Example Page

**BOX 1** 3

[Link 1](#)  
[Link 2](#)  
[Link 3](#)

Section Link

**BOX 2** 5

[Link 1](#)  
[Link 2](#)  
[Link 3](#)

Section Link

### Hovers

ICON 1    ICON 2    ICON 3

### Progress Bar

### Tables

Name	ID	Description
<a href="#">Name (Action Required)</a>	1	<a href="#">Description Here</a> <span>...</span>
<a href="#">Name</a>	2	Description Here <span>...</span>
<a href="#">Name (Selected Row)</a>	3	Description Here <span>...</span>

Type	Image
Header Logo	<a href="#">Change</a> <a href="#">Remove</a>
Site Icon 32x32 pixels	<a href="#">Change</a>
Login Logo	<a href="#">Change</a> <a href="#">Remove</a>

Type	Color
Header bar	<input type="color" value="#e67e22"/>
Menu selected circle	<input type="color" value="#fff"/>
Header bar link color	<input type="color" value="#fff"/>
Link color	<input type="color" value="#1a3d4d"/>
Confirm button Discussion background(current user) Action icons(check mark, ellipse)	<input type="color" value="#e67e22"/>
Confirm button text color	<input type="color" value="#fff"/>
Deny button	<input type="color" value="#1a3d4d"/>
Deny button text color	<input type="color" value="#fff"/>
Hover states Selected row Percentage complete	<input type="color" value="#add8e6"/>
Hover text color	<input type="color" value="#4a7ebb"/>
Notification bubble Action items	<input type="color" value="#4a7ebb"/>
Home Page Message Background Color	<input type="color" value="#add8e6"/>
Switch Company Banner Background Color	<input type="color" value="#4a7ebb"/>

[Preview](#) [Publish](#) [Reset to Default](#)

# Configurations & Permissions

## System Configurations

You can control what customers have access to and the actions they can take.

### Project Request Notification Email

### Show Client Center Orders

- Yes  
 No

### Show Client Center Proposals

- Yes  
 No

### Show Client Center Services

- Yes  
 No

### Show Client Center Tickets

- Yes  
 No

### Show Client Center Artwork

- Yes  
 No

### Show Client Center Digital Media

- Yes  
 No

### Include Client Center Upload Links in Reminder Emails

- Yes  
 No

### Show Client Center Invoices

- Yes  
 No

### Show Client Center Company Statement

- Yes  
 No

### Show Client Center Projects

- Yes  
 No

### Allow contacts to change company in client center

- Yes  
 No

## Client Permissions

Give your customers admin permission to choose which employees can access the client center.

### Administration

- Edit Permissions

### Artwork

- Proof Requests  
 Upload and Assign Artwork

### Sales

- Orders  
 Add Ad Items  
 Approve

### Scheduled Services

- Upload Assets

### Proposals

- Approve

### Digital Media

- Upload Digital Media

### Billing

- Company Statements  
 Invoices  
 Make Payments

### Tickets

- View All Company Tickets

# Encourage Adoption with Barrier-Free Access

## No Passwords Needed for:

- Sign an Agreement
- Upload Artwork
- Approve a Proof
- Pay an Invoice

## System Email Template:

- General Order With Signature Line
- Artwork Reminder (Print, Digital, Grouped)
- Proof Email
- General Invoice



# Agency Accounts

## Manage Multiple Accounts

- Agencies have unique permission to switch between the accounts they represent.

The screenshot displays the ORBITAL24 dashboard. At the top left is the ORBITAL24 logo. The top right shows a user profile for Shalyn ORMSBY (Veridian Dynamics) with a dropdown menu containing 'Account Information', 'Switch Company' (highlighted with an orange border), 'Contact Us', and 'Log Out'. Below the header is a light blue banner with the text 'Welcome Ad Orbit Clients!'. A dark blue banner below that states 'Currently viewing data for Veridian Dynamics' with a 'Switch Company' link. On the left side, there is a 'PRIMARY REPRESENTATIVE' section for Shalyn Ormsby, including her name, email (shalyn.ormsby@aysling.com), and contact information for Accounts Receivable (ar@maghub.com) and the Production Department (production@maghub.com). The main area features a grid of 12 circular icons representing various functions: PROPOSALS, ORDERS, ARTWORK, DIGITAL MEDIA, SERVICES, INVOICES, COMPANY STATEMENT, REQUESTS, ANALYTICS, MY ACCOUNT, and ADMIN.

# Promote Adoption: Suggestions

## Client Center Roll Out:

- Client Center Registration Email
- Create a Login/Usage Video
- Upload Artwork
- Approve a Proof
- Pay an Invoice



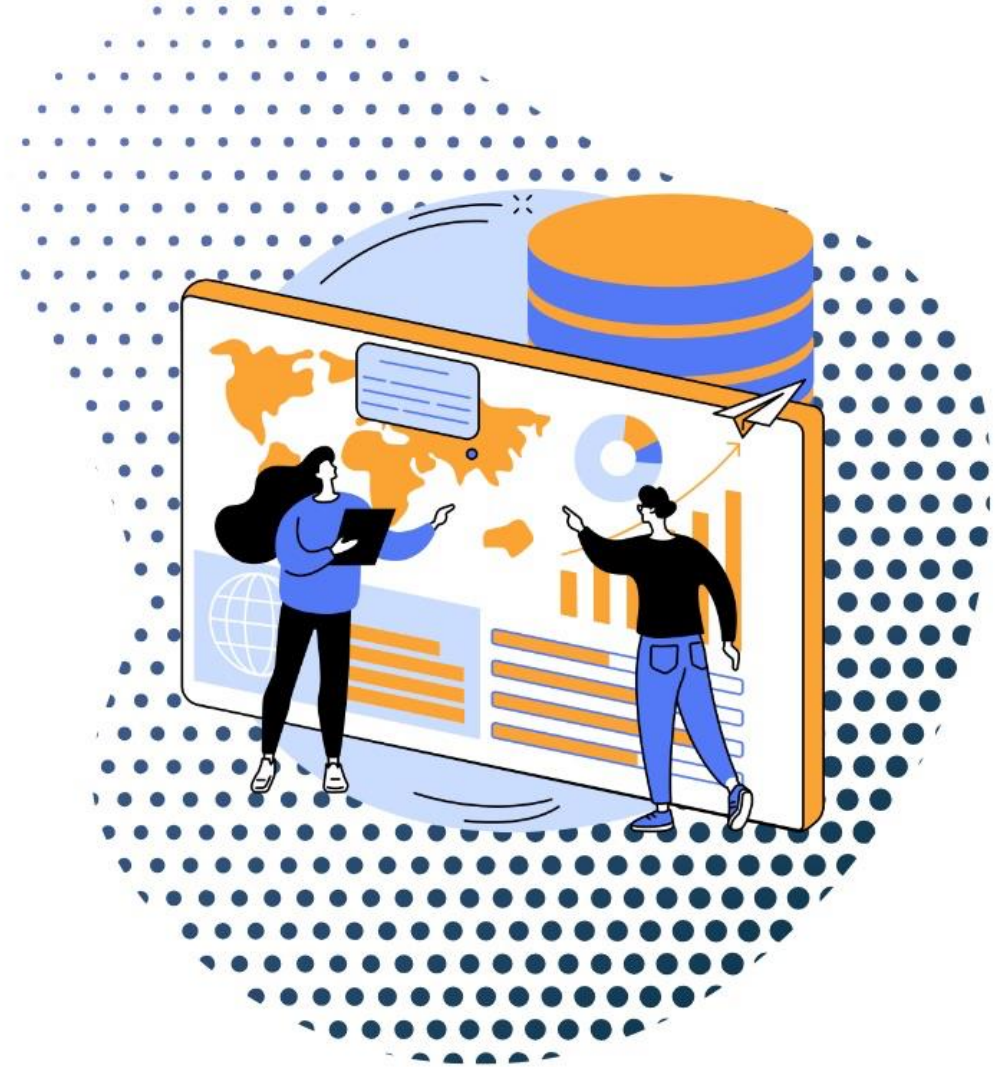
An Overview of the Melara  
Enterprises Client Portal  
with  
**KIRSTEN MILANO**  
*Business Associate, Accounts Receivable*

melara  
enterprises

# Staff Implementation

## Get the team's buy-in.

- Onboard your team just like you will for your clients.
- Let them know you are going to start using the Client Center and what the expectations are , and include adoption goals.
- Send them the Help Center documentation to review.
- Make team members contacts for a test company so they can test and see what their clients will see.
- Utilize Live Chat and Tickets if you have questions.



Contacts » [Search Contacts](#) » Shalyn Ormsby

## Shalyn Ormsby

a contact for [Veridian Dynamics](#) (Primary Contact)

Contact Overview Files Activities Campaigns Mailchimp Subscriptions Cart Orders Assets Soci

Shalyn Ormsby is currently active.

### Contact Information

Shalyn Ormsby (#85204)  
Customer XRef #:  
Connected to MediaRadar: No  
10 University Ave  
Oxford, Ohio 45056  
United States

Time Zone: Eastern Standard Time (-5/-4)

Email: [Shalyn.ormsby4@gmail.com](mailto:Shalyn.ormsby4@gmail.com) ✉  
Subscribed to Automated Emails: Yes  
Opted Out: No

Currency: USD \$

Created By: Shalyn Ormsby on 06/24/2024 02:51:28pm  
Updated By: Shalyn Ormsby on 09/16/2024 10:46:42pm 🕒  
Current Owner: Shalyn Ormsby

### Client Center Information

Client Center Access: Yes

Login:  
Email: [Shalyn.ormsby4@gmail.com](mailto:Shalyn.ormsby4@gmail.com)  
Username: [Shalyn.ormsby4@gmail.com](mailto:Shalyn.ormsby4@gmail.com)

[Reset Login Attempts](#) | [Reset Password](#)

# Supporting Your Clients

- View login email address and username, and update if needed.
- Reset login attempts
- Send a 'Reset Password' link.
- Edit permissions.
- If you need assistance, please contact Live Chat or submit a Support Ticket.

# Client Center Analytics

- See what your clients are up to in the Client Center.
- Go to the 'Client Overview' page.
- Click on the 'Analytics' tab.
- Click on the link(s) on the left to see what your client has accessed.

The screenshot shows the 'Client Center Analytics' page for 'Luna Lovegood'. The page title is 'Luna Lovegood' with a subtitle 'a contact for Wonders Agency (Primary Contact)'. The navigation bar includes 'Contact Overview', 'Files', 'Activities', 'Campaigns', 'Subscriptions', 'Cart Orders', 'Assets', 'Social', and 'Analytics' (which is highlighted with a blue box). Below the navigation bar, there are two main sections: 'Luna Lovegood's Analytics' and 'Client Center Overview (08/19/2022 to 09/19/2022)'. The 'Luna Lovegood's Analytics' section has a date range selector with 'From' and 'To' fields, both containing '08/19/2022' and '09/19/2022' respectively. Below the date range is a vertical menu with the following items: 'Client Center', 'Overview', 'All Activity', 'Login History', 'Logout History', 'Page Views', 'Order Views', 'Invoice Views', 'Statement Views', 'Order Approval', 'Service Uploads', 'Artwork Uploads', 'Approved Proof Requests', 'Pickup Requests', 'Assigned Artwork', and 'Payments Made'. The 'Client Center Overview' section displays a table with the following data:

Action	Occurrences
Viewed Page	11
Logged In	2
Logged Out	2

**Questions?**