Client Info Portal

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The Client Info Portal lets you give your clients access to details of attendee registrations for their event and a custom selection of EventsAir reports.

Setting up the Client Info Portal

Details

As for all apps/portals, you need to set up a name, Alias (URL), brand, live dates, and messaging for before and after the app is live. **Read this article for more information.**

Settings – Client Info Portal

- **Available Reports** – choose which reports the client will be able to run through the portal.
- **Available Exports** – choose which exports your client will be able to run through the portal

Content – Client Info Portal

Configure the page content for the following portal pages:

- **Sign in Page**
- **Home Page**
- **Search Page** – also includes:
    - **Info Button Label** – you can change the button name from "Info" to something that better describes the Merge Doc you are using.
    - **Merge Doc for Additional Info** – pick any custom Merge Doc you have created to display client information.
- **Report Page**

Users Tab

In this tab, you set up who's allowed to access the app or portal. To add a new user, click the plus sign next to **App**

Users, and complete the fields below. When you've finished adding users, press **Save.**

> **Note:** You must set up **Users** here before anyone can use this app or portal.

Click on **App Users** to create a new user, then fill in the following:

- **Email Address**
- **Password**
- **First Name**
- **Last Name**
- **Organization**
- **User Type** – (Leave as Basic – the default. No other user types for this app.)
- **User Level** – (Leave as Standard – the default.)
- **Is Disabled** – check this to disable the account, so the user cannot sign in.
- **Last Logon** – shows the date and time this user last signed in.

Access Logs

This tab, under Users, shows the details of every time this user has signed in to the portal. Here you can review the date and time of access, the originating IP address, and any actions taken.

Using the Client Info Portal

Search

A client can enter a part of the Attendee's First Name, Last Name or Organization, then select **Search** to see a list of matching people.

A logged in user can also see more information about an Attendee, or press the **Info** button to see a custom Merge Doc for that Attendee.

Reports

Clients can choose a report and press View. The report will display in a new tab in the browser.