



TRIPS

# Invite a client to the portal

Two places to send a portal invite — the trip's travelers strip and the contact's Access tab — plus the auto-invite setting, the 7-day claim link, resending, and how disabling and reactivating works.

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Sending a portal invite is one click from two places: the trip's travelers strip and the contact's **Access** tab. This article covers both, the auto-invite toggle that fires invites on first share, and what happens when you resend, disable, or reactivate an account.

#### ADVISOR TIP

**You need a portal slug first.** Invites won't send until your agency has a portal slug set under **Settings** → **Branding**. Without it, the claim link would point nowhere — so the API refuses with a clear error.

## Invite from the trip page

Open any trip and look at the **Travelers** card in the right rail. Each traveler chip carries a portal-state pill (Active, Invite pending, or nothing) and a button that adapts to whatever state they're in.

1. Click the contact's row.
2. Click the email-icon button at the bottom of the row. The label is **Invite to portal** (no account yet), **Resend invite** (invite pending), or **Send password reset** (account already active).
3. That fires the invite immediately and shows a toast confirming where it went.

#### ADVISOR TIP

**Same endpoint, three labels.** The button text changes based on account state but the underlying call is idempotent — it mints a fresh claim token and emails it every time. Clicking on an active account just sends a password reset; clicking on pending re-issues the original invite.

## Invite from the contact's Access tab

The contact drawer's **Access** tab is the deeper surface — it shows the current account state, recent login activity, and every action you can take on the portal account.

- **Send invite** — first-time invite, only shown when no account exists yet.

- **Resend invite** — visible on pending accounts; mints a fresh token and resends.
- **Send password reset** — visible on active accounts; mints a reset link.
- **Cancel & disable** — visible on pending accounts; voids the pending token and disables the account.
- **Disable access** — visible on active accounts; kicks the session and prevents future sign-ins.
- **Reactivate & reinvoke** — visible on disabled accounts; flips disabled off AND sends a fresh invite in one click.
- **Re-enable only** — visible on disabled accounts; flips disabled off without sending an email.

## The invite email

Invites ship via Postmark by default, with the agency's name, logo, and brand color interpolated into the template — so the email reads as coming from your agency, not from "Trips." If you've connected your personal Gmail (

[Gmail integration](#)), invites you trigger personally route through Gmail instead, so the email shows as coming from **Pat at Pride Travelers** rather than `noreply@urttravelpro.com`. Postmark is the silent fallback if your Gmail token has expired.

The link inside is a one-shot claim token good for 7 days. The client clicks it, lands on `/portal/{your-slug}/claim/{token}`, sets a password, and is signed in.

### ADVISOR TIP

**Claim links expire — by design.** 7 days is plenty for a vacation traveler who might not check email daily, but it does mean an unused invite eventually goes stale. Just hit **Resend invite** to mint a new one.

## Auto-invite on first share

If you don't want to think about portal invites, the auto-invite toggle handles them for you.

1. Open **Settings** → **Client portal**.
2. Tick **Send a portal invite on first share** and save.
3. From now on, the first time you share an invoice or a proposal on a trip, Trips picks the primary traveler with an email on file and auto-mints them an invite.

It picks **one candidate per trip** — the primary traveler with an email, otherwise the first traveler with an email — and only invites if that candidate doesn't already have a portal account (active, pending, or disabled). Secondary travelers aren't auto-invited; if you need them in the portal too, invite them manually from the

travelers strip. Auto-invites go via Postmark only — they skip the Gmail-first path to keep the dispatch simple and reliable.

**ADVISOR TIP**

**Off by default.** Agencies who want to invite clients deliberately (e.g. only after a deposit) can keep the toggle off and use the per-trip button instead. Either way works.

## Disabling and revoking access

Click **Disable access** (active) or **Cancel & disable** (pending) on the contact's **Access** tab. The account is marked disabled — the client can't sign in, their active session is invalidated on the next request, and pending invite tokens are cleared. The contact record itself stays untouched.

Disabled isn't deleted — the row stays so you can re-enable later, see who disabled it and when, and review past login history. Two ways to bring access back:

- **Re-enable only** — restores access silently. The client keeps their existing password and can sign in immediately.
- **Reactivate & reinvite** — restores access AND sends a fresh invite email so the client can set a new password. Useful when the original credentials are forgotten or compromised.

**ADVISOR TIP**

**Archived contacts can't hold an active portal account.** If you archive the contact, their portal account is disabled by cascade. Both reactivate options refuse with a clear error until you restore the contact first.

# Troubleshooting

## The invite button says "This contact has no email address on file."

A portal invite needs an email to send to. Open the contact and add one to their Core identity (Contact Info tab), then try the invite again.

## I sent an invite but the client didn't get it.

See [My client didn't get their portal invite](#) for the full diagnosis sequence — spam folder, wrong email on file, expired link, or delivery block.

## The client clicked the link and it says "That link is no longer valid."

Claim tokens expire after 7 days, and they're single-use — once they've set a password the token is consumed. Hit **Resend invite** (or have the client use the **Forgot password** link on the login page) to mint a fresh one.

## Can I see who else has an active portal account?

Not in a global list view yet — portal account state is currently inspected per-contact on the Access tab. The trip travelers strip is the closest thing to a roll-up; it shows the Portal active / Invite pending pill next to each traveler chip.

## Related

- [The branded client portal](#)
- [My client didn't get their portal invite](#)
- [Gmail integration](#)
- [The portal sign-in prompt](#)