



TRIPS

The branded client portal

A tour of the client-facing portal in Trips — what your clients see when they sign in, how trip pages, messages, files, and notifications work, and why portal logins are kept separate from your agent session.

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The client portal is the public-facing side of Trips — a branded, password-protected web app where your clients land to see their trips, read proposals, pay invoices, sign forms, and message your team. This article walks through what your clients see and how the moving parts fit together.

ADVISOR TIP

Your clients never sign into Trips. The portal is its own app at your-`agency.urtravelpro.com/portal` (or your custom domain). They get a password — separate from anything you use as an agent — and only ever see the surfaces you've explicitly shared with them.

What your client sees after they sign in

A client who claims their portal invite lands on a personal dashboard with a hero welcome banner, a featured trip card for whatever's upcoming or currently in progress, lifetime travel stats (countries visited, days traveled, total trips), an outstanding balance counter rolled up across their invoices, and a card grid of every trip they're a traveler on.

The dashboard also surfaces an **Open tasks** module showing up to eight client-visible todos across all of their trips, ordered by urgency. Anything you mark **Client-visible** on a todo shows up there; anything internal-only stays out of sight.

ADVISOR TIP

Past trips count too. "Days traveled" and "Countries visited" sum across every completed trip the client is on — defined strictly by *end date is in the past*, so the stats don't depend on you keeping the trip status up to date.

The per-trip page

Clicking a trip card opens the trip page — the meat of the portal. The layout matches what you see on the agent side, but stripped to client-relevant surfaces only:

Main column

- **Hero** — cover photo, dates, destinations, a Pizza-Tracker-style status bar showing client-facing stages.
- **Proposals + Itineraries** — anything you've shared with a non-revoked share link.
- **Invoices** — every non-draft, non-canceled invoice with a pay-now CTA where applicable.
- **Forms to complete** — actionable forms you've shared to the trip (already-submitted forms move to the Forms tools page).
- **Files from your team** — only attachments you've marked **Client-visible**.
- **Tasks** — open client-visible todos plus a collapsed summary of completed ones.

Right rail

- **Travel team** — the assignees on the trip with a Message Team / Message {agent} CTA.
- **Messages** — link into the trip's threaded conversation.
- **Quick links** — Forms, Memories (when enabled), and Compass guides your team has attached.
- **Traveling with** — chips for every other contact on the trip.

ADVISOR TIP

Client sees only what you've marked client-visible. Files default to hidden; proposals and itineraries only appear once they have a non-revoked share token; todos require the **Client-visible** flag. Nothing leaks to the portal until you explicitly share it — that's the whole design.

Signing in

Portal accounts use email + password, with the password set the first time the client clicks their invite link. The link itself is a one-shot claim token (good for 7 days) — they tap it, set a password, and they're in. Subsequent visits use the email + password form at `/portal/{your-slug}/login`.

If a client forgets their password, the **Forgot password** link mints a fresh claim token and emails it the same way an invite does. Same flow under the hood, same 7-day expiry on the link.

ADVISOR TIP

"**Magic link**" means **claim/reset link** — **not passwordless**. The portal isn't a one-click-and-you're-in surface; the link is how the client sets or resets their password. Once it's set, they sign in with email + password every time.

Notifications

Every signed-in portal page carries a bell icon in the topbar. It polls every 60 seconds and shows the 20 most recent notifications — trip status changes, new proposals shared, invoices shared, tasks added, messages from your team, and final-payment-due reminders. Unread items get an amber strip and a count badge. **Mark all read** clears the count without dismissing the rows.

Why portal sessions are separate from agent sessions

Trips runs the portal on its own auth guard — a different session than the agent UI uses. So if you and a client log into Trips on the same laptop, neither session can step on the other. The client can't accidentally land in your agent dashboard, and you can't accidentally see the portal "as your client" without explicitly signing in as them.

This also means custom domains stay airtight: a client signed into `mytrip.youragency.com` doesn't carry that session over to a different agency's portal, even on the same browser.

Custom domain (optional)

By default the portal lives at `trips.urtravelpro.com/portal/{your-slug}`. Most agencies attach a custom hostname like `mytrip.youragency.com` so the URL reads as theirs. See [Set up a custom portal domain](#) for the DNS walk-through and the SSL/Apple Pay nuances.

Disabling a portal account

From the contact's **Access** tab, you can disable a portal account at any time. A disabled account can't sign in, any active session is kicked on the next request, and pending invite tokens are voided. The history stays — you can re-enable later, or use **Reactivate & reinvite** to flip the disable AND send a fresh invite in one click.

ADVISOR TIP

Archiving a contact disables their portal access automatically. When you restore the contact, their portal access does NOT automatically come back — you re-enable it manually. Prevents an accidental restore from re-opening login for someone who shouldn't have it.

Troubleshooting

My client says they didn't get the portal invite email.

Three things to check, in order: spam folder, the email address on the contact record, and a delivery block. The invite ships from Postmark by default (or your connected Gmail when one is linked). See [My client didn't get their portal invite](#) for the full sequence.

My client can sign in, but the dashboard is empty.

They're probably not listed as a traveler on any trip yet. The portal dashboard lists trips by traveler membership — not by who you've shared a proposal with. Open the trip and add them to the **Travelers** strip; the trip card appears on their next dashboard refresh.

My client sees a trip but no proposals/files/invoices.

The trip is visible because they're a traveler, but each surface has its own visibility flag. Files need **Client-visible** set, proposals/itineraries need an active (non-revoked) share token, and invoices skip Draft and Canceled. Audit the per-surface flags on the agent side.

My client signed in but their profile photo is missing.

Photo uploads happen on the client's **Profile** page inside the portal. The dashboard's travelers chips fall back to initials when the contact has no photo on file. Ask the client to upload one, or upload on their behalf from the agent contact page.

Related

- [Invite a client to the portal](#)
- [Set up a custom portal domain](#)
- [The portal sign-in prompt](#)
- [My client didn't get their portal invite](#)