



TRIPS

# Client says they can't see my proposal

You shared a proposal but the client says nothing's there. Walk through the common causes — link was minted but never sent, proposal was unpublished, link landed on a custom domain that's not Live yet — and how to fix each.

You clicked **Share** on a proposal and texted the link to your client — and they're telling you the link is dead, or there's nothing there. Five things tend to be wrong, in roughly the order we see them.

Quick mental model: **Share** on a proposal mints a public link of the form `/p/{token}` served from your branded portal host. The client doesn't need to log in — the token is the credential. The link dies the moment you unpublish the proposal or revoke the link individually; otherwise it stays live indefinitely.

**ADVISOR TIP**

**First check — open the link yourself in an incognito window.** Most "they can't see it" reports are just a typo in the URL the client got, or the link going to spam. If the incognito tab loads it, the link is healthy.

### **I clicked Share but I'm not sure I ever sent the link.**

Click **Share** again — the controller is idempotent, so it returns the same live token rather than minting another. Copy the URL with the **Copy link** button, or use **Send** to email it from your connected Gmail. Until the client has the URL in front of them, sharing didn't finish.

### **The proposal is in Draft — does it have a share link?**

A draft has no live share link. Clicking **Share** on a draft flips it to **Sent** and mints the token in the same action. If the proposal is sitting in draft, click **Share** now.

### **I unpublished the proposal yesterday and shared again — the old link still 404s.**

Expected. Unpublishing flips the status back to Draft and **revokes every live share token in the same transaction** — old URLs go dead permanently. The new **Share** click mints a different token. Make sure the client is using the URL you most recently sent, not the one in last week's email.

### **The link works for me but the client gets a connection or SSL error.**

You're probably running a custom portal domain that hasn't gone Live yet. The Copy/Send buttons return URLs on your custom host as soon as it's configured, but if SSL is still being issued the client's browser refuses to connect. See [My custom domain won't connect](#) for the status check.

### **How do I know if they ever actually opened it?**

Every view bumps a counter on the share link and stamps **last viewed**. On the proposal's detail page, the Share section shows **Viewed N times, last opened X ago**. Zero views = they haven't opened it.

### **Can I send the proposal as an email attachment instead of a link?**

No — proposals are live HTML documents (cover photo, scrolling sections, embedded media) and don't round-trip cleanly to a static file. Send the link. If the client needs a copy to forward to a spouse, they can use **Print / Save as PDF** from inside the proposal.

#### **ADVISOR TIP**

**Be careful with "Unpublish" mid-conversation.** Revoking is permanent for that token — even if you re-share within the same minute, the URL the client has in their inbox is now dead. Edit-then-share is fine because the token survives; only Unpublish kills the link.

## When to open a support ticket

Open a ticket if the link opens for you in incognito but the client sees a 404 from a non-custom-domain URL, or if view counts are stuck at zero even after the client confirms they opened it twice. Include the proposal's public ID and the share URL.

## Related

- [Sharing proposals and e-signature](#)
- [Proposal builder](#)
- [My custom domain won't connect](#)
- [Client can't log into the portal](#)