

Client Portal Management

Not all of your company's reports can be shared with your clients. The Client Portal Management page is where you can publish reports that your clients can have access to. You can customize this portal to reflect your brand and grant access to clients who are allowed to view your data.

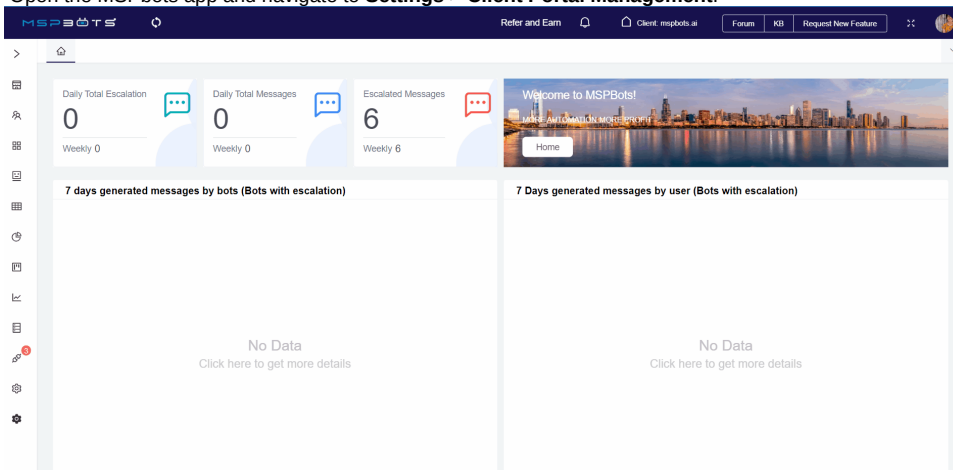
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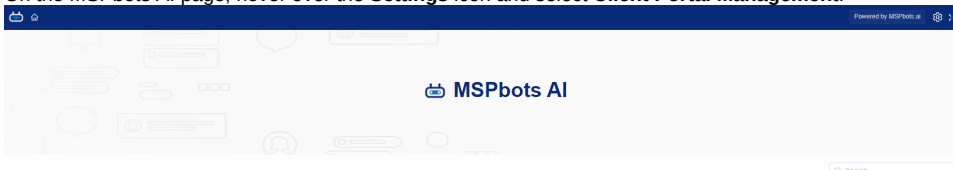
This information applies to ConnectWise and Autotask users.

A. How to add a client to Client Portal Management

1. Open the MSPbots app and navigate to **Settings > Client Portal Management**.



2. On the MSPbots AI page, hover over the **Settings** icon and select **Client Portal Management**.



3. When the Client Portal Management screen appears, click the **New** button to display the New Client window.

← Client Portal Management ⓘ

New

Drag a column header here to group its column

Search

Columns

Company Name	First Name	Last Name	Contact Email	Status	
acorn	test		test@126.com	Enabled	EditReset PasswordDelete
acorn	test	test	test@microsoft.com	Enabled	EditReset PasswordDelete
test	test	test	test@123.com	Enabled	EditReset PasswordDelete
test	test	test	test@126.com	Enabled	EditReset PasswordDelete
test	test	test	test@126.com	Enabled	EditReset PasswordDelete
test	test	test	test@126.com	Enabled	EditReset PasswordDelete
test	test	test	test@126.com	Enabled	EditReset PasswordDelete
test	test	test	test@126.com	Enabled	EditReset PasswordDelete

1

100

Items per page

1 of 1 pages (7 items)

4. On the New Client window, provide the client's **Email Address**. This email has to match the client's email address in the Connectwise or Autotask contacts. The First Name, Last Name, and Display Name fields are automatically populated.

New Client

Client Information

Dashboard Permission

Search

* Email Address

User Name

* First Name

First Name

* Last Name

Last Name

* Display Name

Display Name

Direct Phone

Mobile

Password

Password

Confirm Password

Repeat Password

Company Name

Company Name

Status

☐ Disable ☒ Enabled

Name

createDate

☐	Attendance Summary	2023/04/12 21:40 CDT
☐	Attendance Summary Technician - Demo	2022/09/16 09:38 CDT
☐	AVC Dashboard for Demo	2022/09/22 10:40 CDT
☐	CN Support	2023/04/22 03:04 CDT
☐	CN Support Team Dashboard	2023/04/22 01:34 CDT
☐	CN Support Team Dashboard	2023/04/22 01:34 CDT
☐	CS Executive Dashboard	2022/12/16 15:42 CST
☐	Customer Tickets Portal test	2022/11/02 15:30 CDT
☐	DA Board	2021/05/17 12:00 CDT
☐	DA JIRA weekly report	2021/04/26 03:01 CDT
☐	Dev staffing information	2022/01/04 02:06 CST

Cancel

Confirm

5. Next, enter the **Password** and retype it to confirm.

New Client ×

Client Information

* Email Address

User Name

* First Name

First Name

* Last Name

Last Name

* Display Name

Display Name

Direct Phone

Mobile

Password

Password

Confirm Password

Repeat Password

Company Name

Company Name

Status

☐ Disable ☒ Enabled

Dashboard Permission

Q Search

	Name	createDate
☐	My Personal Dashboard	2023/04/12 21:40 CDT
☐	Attendance Summary Technician - Demo	2022/09/16 09:38 CDT
☐	AVC Dashboard for Demo	2022/09/22 10:40 CDT
☐	CN Support	2023/04/22 03:04 CDT
☐	CN Support Team Dashboard	2023/04/22 01:34 CDT
☐	CN Support Team Dashboard	2023/04/22 01:34 CDT
☐	CS Executive Dashboard	2022/12/16 15:42 CST
☐	Customer Tickets Portal test	2022/11/02 15:30 CDT
☐	DA Board	2021/05/17 12:00 CDT
☐	DA JIRA weekly report	2021/04/26 03:01 CDT
☐	Dev staffing information	2022/01/04 02:06 CST

Cancel

Confirm

6. Continue by selecting the reports that you want to share with your clients.

New Client ×

Client Information

* Email Address

User Name

* First Name

First Name

* Last Name

Last Name

* Display Name

Display Name

Direct Phone

Mobile

Password

Password

Confirm Password

Repeat Password

Company Name

Company Name

Status

☐ Disable ☒ Enabled

Dashboard Permission

Q Search

	Name	createDate
☐	My Personal Dashboard	2023/04/12 21:40 CDT
☒	Attendance Summary Technician - Demo	2022/09/16 09:38 CDT
☒	AVC Dashboard for Demo	2022/09/22 10:40 CDT
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☐	CS Executive Dashboard	2022/12/16 15:42 CST
☐	Customer Tickets Portal test	2022/11/02 15:30 CDT
☐	DA Board	2021/05/17 12:00 CDT
☐	DA JIRA weekly report	2021/04/26 03:01 CDT
☐	Dev staffing information	2022/01/04 02:06 CST

Cancel

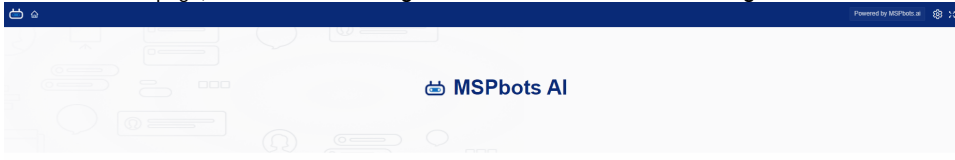
Confirm

For now, the app does not automatically send emails to clients. You can test the login from an incognito browser to ensure the reports are working properly.

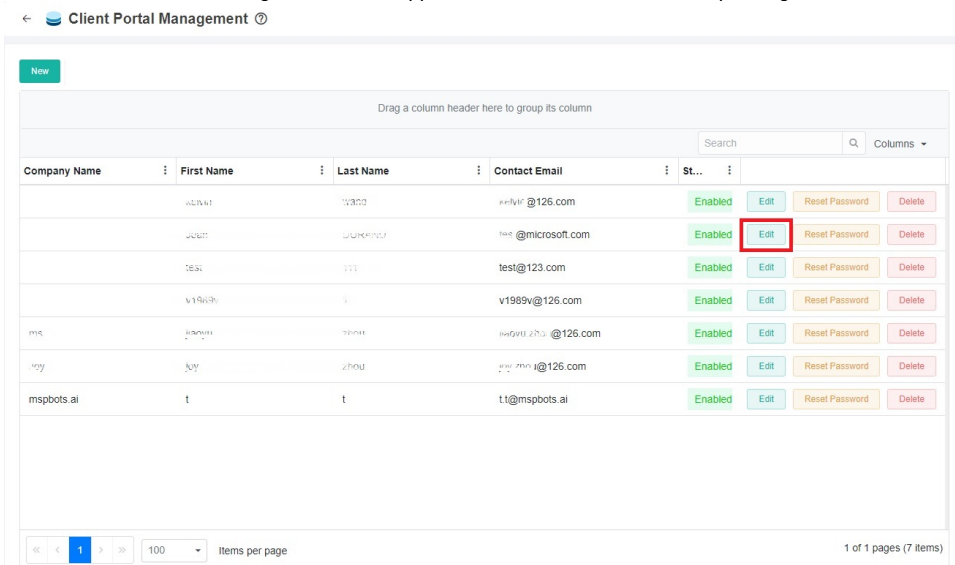
- Click **Confirm** to save the setting. You can now send the login portal address, email, and password to your client.

B. How to modify a client's information

- On the MSPbots page, hover over the **Settings** icon and select **Client Portal Management**.



- When the Client Portal Management screen appears, click the **Edit** button corresponding to the client whose information needs to be modified.



- When the Edit Client window appears, modify the information that needs to be changed or updated.
- Click **Confirm** to save your modification.

Watch the video guide

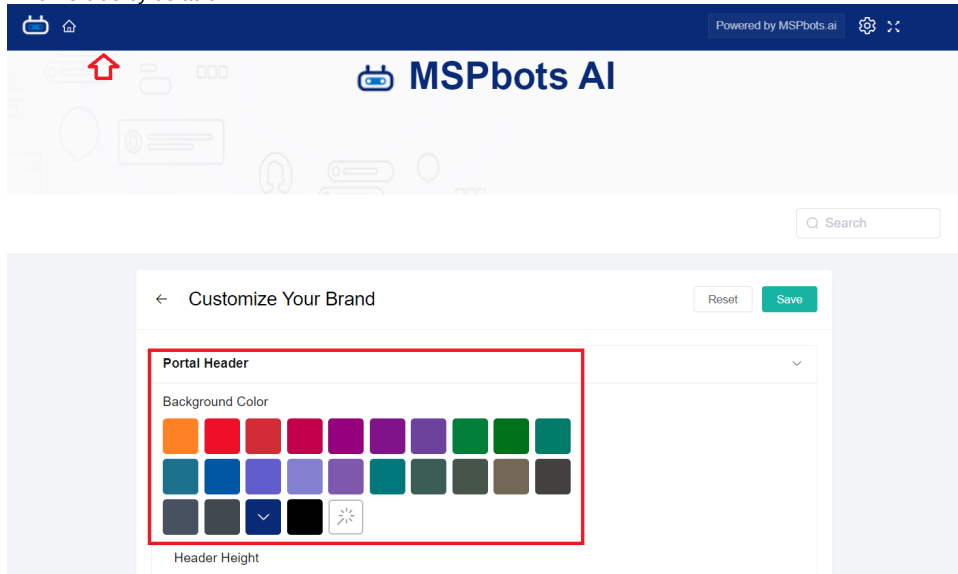
C. How to customize the Client Portal according to your brand

- On the Client Management Portal, click the **Settings** icon and select **Customize Your Brand**.

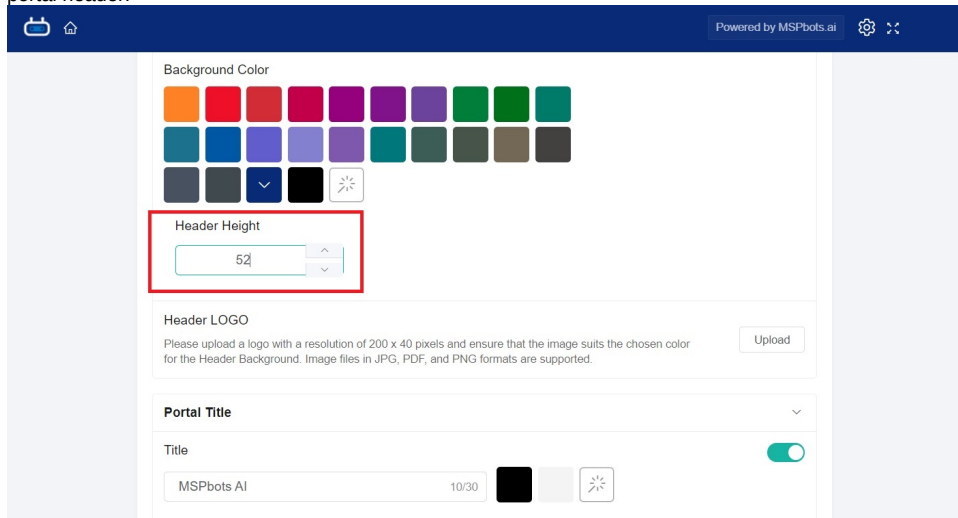


- Configure the **Portal Header** by setting the Background Color, Header Height, and Header Logo.
The header automatically applies your modifications so you can readily preview your customizations.

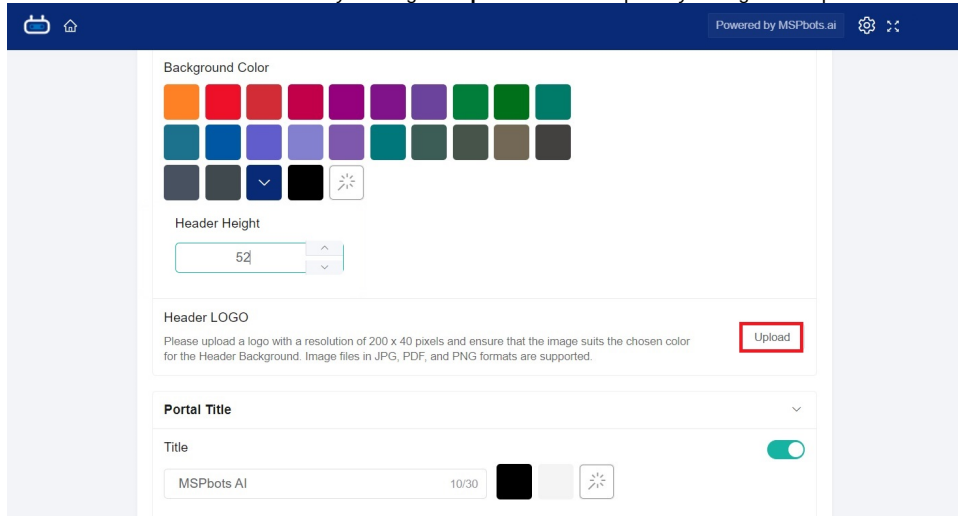
- a. First, set the **Background Color** by selecting a color for the **Portal Header**. This step will modify the color of the bar on top of the page which is blue by default.



- b. Next is to **modify the Header Height** according to your preference. Use the  or  buttons to adjust the thickness of the portal header.

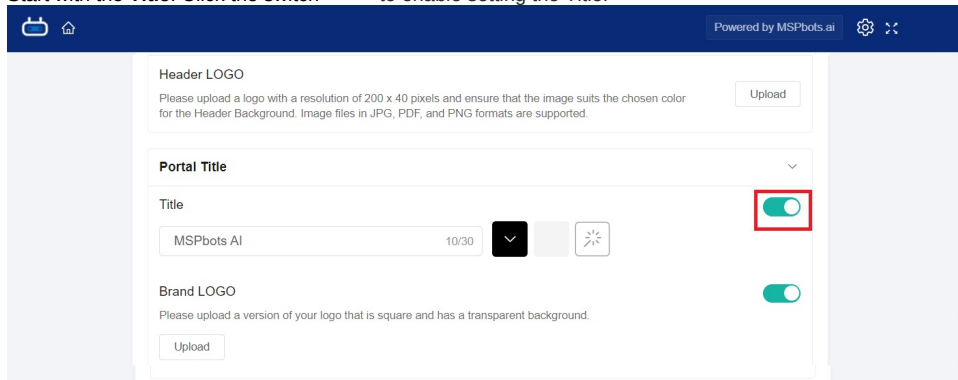


- c. Then customize the **Header LOGO** by clicking the **Upload** button to upload your logo to the portal header.

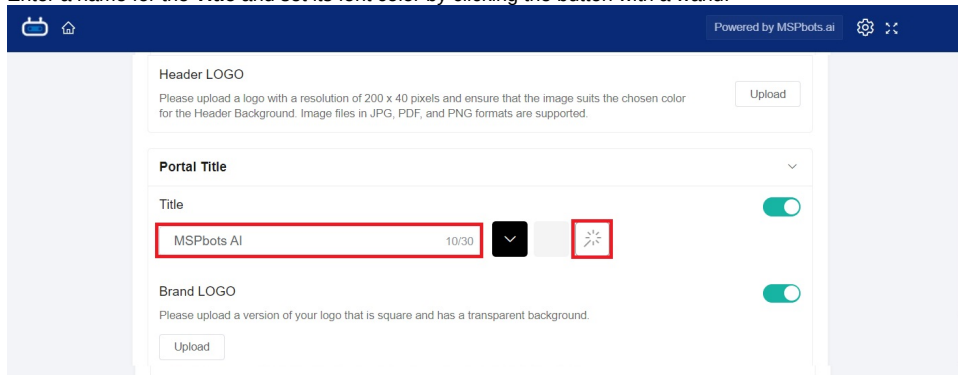


3. Next, scroll down on the page and configure the **Portal Title** by setting the Title, Brand Logo, Layout, and Brand Image.

- a. Start with the **Title**. Click the switch  to enable setting the Title.

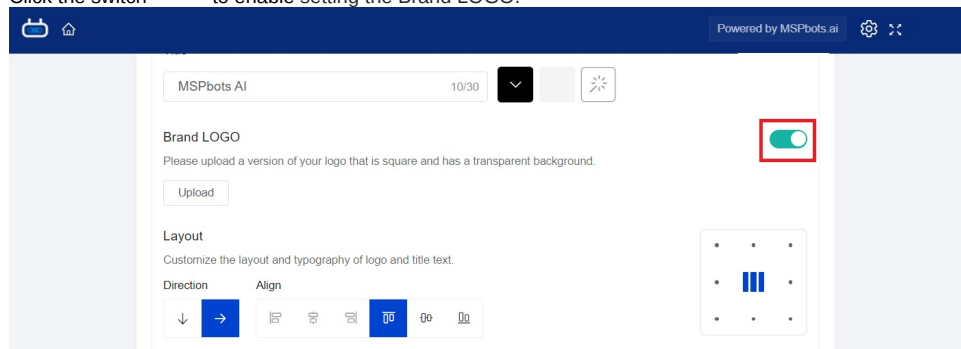


- b. Enter a name for the **Title** and set its font color by clicking the button with a wand.

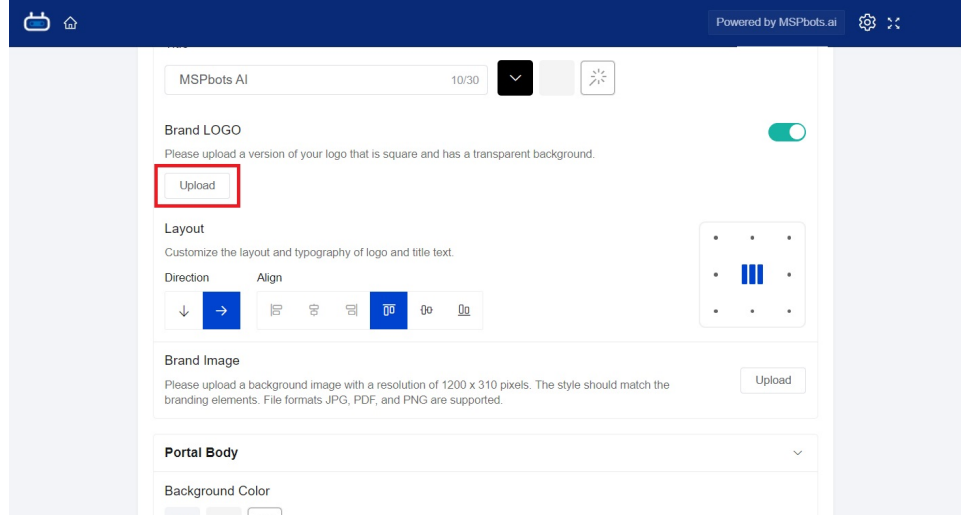


- c. Select a color and click **OK**.
d. Next, upload your **Brand LOGO**.

- i. Click the switch  to enable setting the Brand LOGO.



- ii. Click the **Upload** button to upload your company logo. Use an image that is square and has a transparent background.



- e. Then customize the **Layout** of the Portal Title.
Do this by selecting the **Direction** and **Align** (Alignment) for your Portal Title.

Portal Title

Title

MSPbots Client Portal 21/30

Brand LOGO

Please upload a version of your logo that is square and has a transparent background.

Upload

Layout

Customize the layout and typography of logo and title text.

Direction

Align

Brand Image

Please upload a background image with a resolution of 1200 x 310 pixels. The style should match the branding elements. File formats JPG, PDF, and PNG are supported.

Upload

You can also adjust the placement of the Portal Title by selecting a location represented by the dots.

Portal Title

Title

MSPbots Client Portal 21/30

Brand LOGO

Please upload a version of your logo that is square and has a transparent background.

Upload

Layout

Customize the layout and typography of logo and title text.

Direction

Align

Brand Image

Please upload a background image with a resolution of 1200 x 310 pixels. The style should match the branding elements. File formats JPG, PDF, and PNG are supported.

Upload

- f. The last modification for Portal Title is to set the **Portal Brand Image**.
To customize the Portal Brand Image, click the **Upload** button and upload a background image with a resolution of 1200 x 310 pixels. File formats JPG, PDF, and PNG are supported.

Portal Title

Title

MSPbots Client Portal 21/30

Brand LOGO

Please upload a version of your logo that is square and has a transparent background.

Upload

Layout

Customize the layout and typography of logo and title text.

Direction

Align

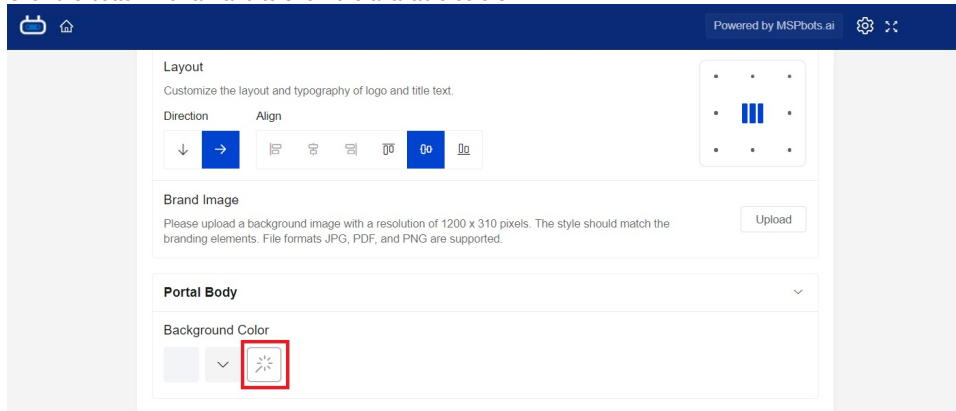
Brand Image

Please upload a background image with a resolution of 1200 x 310 pixels. The style should match the branding elements. File formats JPG, PDF, and PNG are supported.

Upload

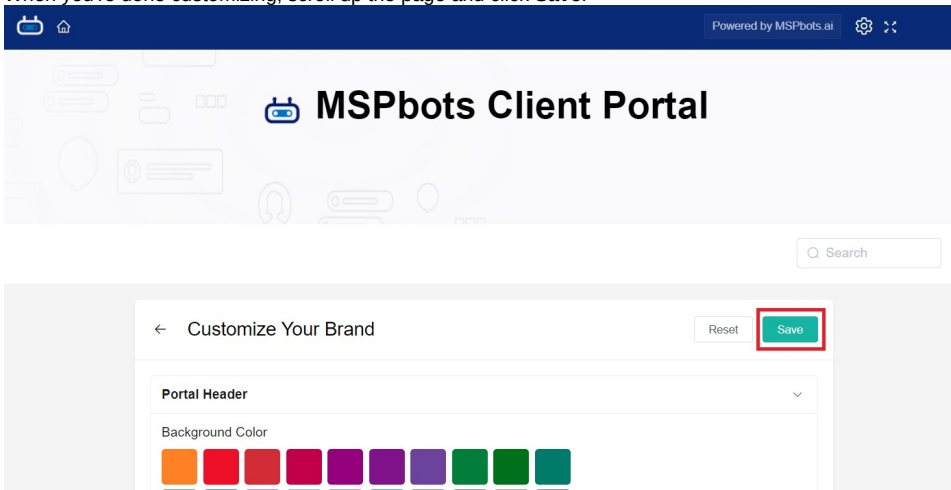
4. Next, configure the **Portal Body** by selecting a **Background Color**.

- a. Click the button with a wand to show the available colors.



- b. Choose a color and click OK.

5. When you're done customizing, scroll up the page and click **Save**.



Click **Reset** if you want to change or undo your modifications.

D. Sending login information to your client

Use the template below to get in touch with your client.

Dear [client's first name],

Here is the information you need when logging in to your client dashboard:

- Login portal address: <https://app.mspbots.ai/loginAsAccount>
- Your email and password

E. Known Issues and Future Improvement

You cannot add a client who has an account with MSPbots already. For this requirement, please send an email to support@mspbots.ai so we can add it manually.

Related Topics

- [How to Add Your Screen to the MSPbots Device List](#)
- [How to Share A Dashboard Using the Embed Function \(HTML\)](#)
- [Presenting Dashboards Using the Rotating Dashboard View](#)
- [How to Share a Dashboard Using the Shareable Link Function](#)
- [Sharing Dashboards Using the Stream to TV Function](#)
- [How to Create a Shared Public Dashboard](#)
- [How to Share Financial Dashboards with Non-financial Admin Roles](#)
- [How to Create and Use Dashboards in MSPbots](#)

- [How to Create and Use Reports in MSPbots](#)
- [Some users are not appearing on the MSPbots dashboard](#)