

Client Portal

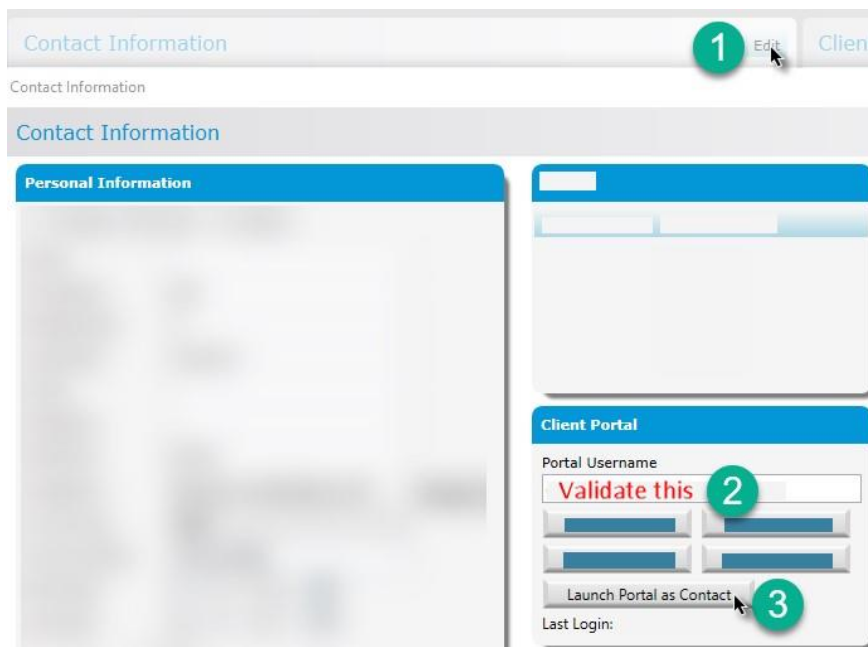
How do I see the client-version of the portal?

You may see what the client sees when they log into the client portal by Accessing the Client Dashboard, clicking **edit** in the Contact Information widget, validating that the Client Portal email address is the one you wish to see, and clicking the **launch portal as contact** button.

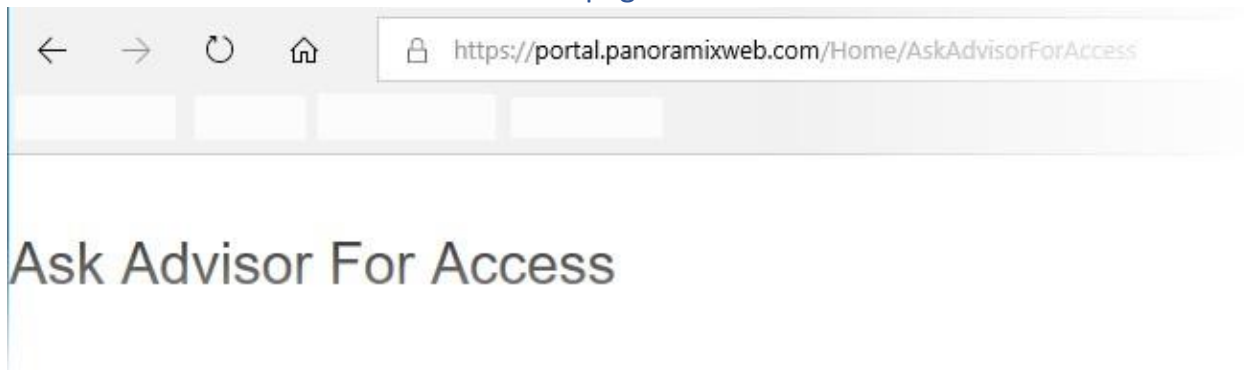
Client Sees an Error

My client is seeing the following error when attempting to access the Panoramix client portal. **Server Error in '/' Application**. The provided anti-forgery token was meant for a different claims based user than the current user. ...

This is possible immediately following the client having setup their password and they leave their browser open and they click the activation link again. It is resolved by having the client close their browser and accessing the portal again.



Client routed to “Ask Advisor for Access” page



This can happen for two reasons.

One is that the client is attempting to access an incomplete URL. Your advisory URL ends with a `AdvisorID=XXX` parameter. Without that, the client cannot access their own portal and will receive this page directing them to you. If you do not know your advisory portal link, please contact Panoramix support and we will send it to you.

The second is that the client has yet to be invited to the portal. Complete the portal invitation steps summarized as follows.

1. Access Client
2. **Edit** contact information
3. Place client's email address into the *Portal User Name*
4. Click **send invitation**

I encounter an error whilst viewing the portal as the client

When accessing the portal as the client, I encounter an error page that starts as follows.

Server Error in '/' Application.

Object reference not set to an instance of an object.

Or

Server Error in '/' Application.

*The parameters dictionary contains a null entry for parameter 'advisorId' of non-nullable type 'System.Int32' for method 'System.Threading.Tasks.Task`1[System.Web.Mvc.ActionResult] Login (System.String, Int32, System.String, System.String)' in 'Portal.PanoramixFinancial.Controllers.AccountController'. An optional parameter must be a reference type, a nullable type, or be declared as an optional parameter.
Parameter name: parameters*

This means that you have reached the time-out limit for accessing the client portal in client view mode. You will need to close the browser tab, return to Panoramix, and re-launch the view as client. In addition, you *may* have to clear your browser of the history for the affected pages.

May I view the client portal for more than one client simultaneously?

No.

Well, technically you can, but you will likely get cross-client contamination if you do so. It's not a supported function.