

# CITK

Client Portal – Single Sign On (SSO)  
and Magic Links



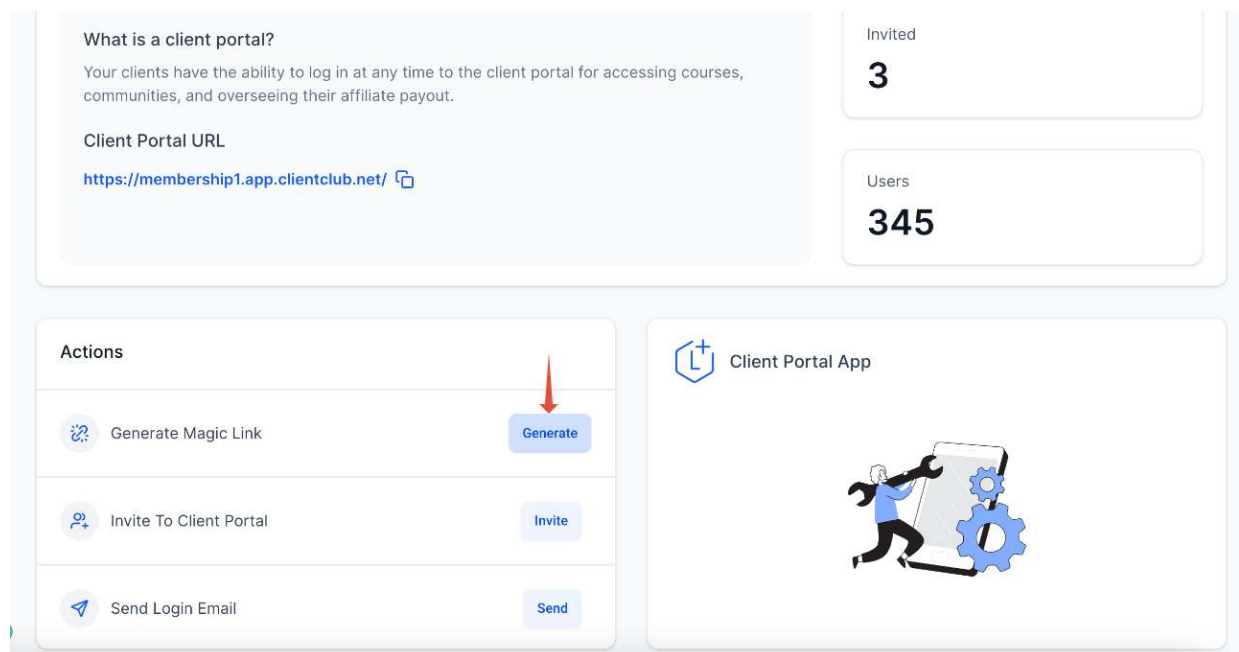
We are excited to introduce a groundbreaking feature in our client portal experience—Single Sign-On (SSO) Magic Links for individual client portal apps! This enhancement is part of our ongoing commitment to providing a seamless and efficient user experience. With SSO Magic Links, accessing your favourite client portal apps is now easier than ever.

## In This Article

- [How to generate and use Magic Links:](#)
- [How to use magic links as custom menu links:](#)

## How to generate and use Magic Links:

Users can effortlessly generate magic links directly from the Client Portal Dashboard for individual client portal child apps, including Courses, Communities, and Affiliates.



# Client Portal - Single Sign On (SSO) and Magic Links

The image displays two screenshots of a software interface, likely a client portal management tool, showing the process of generating magic links for apps.

**Top Screenshot:**

- Header:** Sites, Funnels, Websites, Blogs (New), WordPress, Client Portal, Forms, Surveys, Chat Widget, Media, URL Redirects.
- Client Portal URL:** <https://membership1.app.clientportal.com>
- Actions:**
  - Generate Magic Link
  - Invite To Client Portal
  - Send Login Email
- Client Portal App:** 3, Users: 345

**Modal: Generate Magic Links For Your Apps**

- Select Magic Link Type:**
  - ☒ Contact
  - ☐ Custom Menu
- Contact:**
  - Search by name,email
  - ☐ Send Email
- Buttons:** Cancel, Generate

**Bottom Screenshot:**

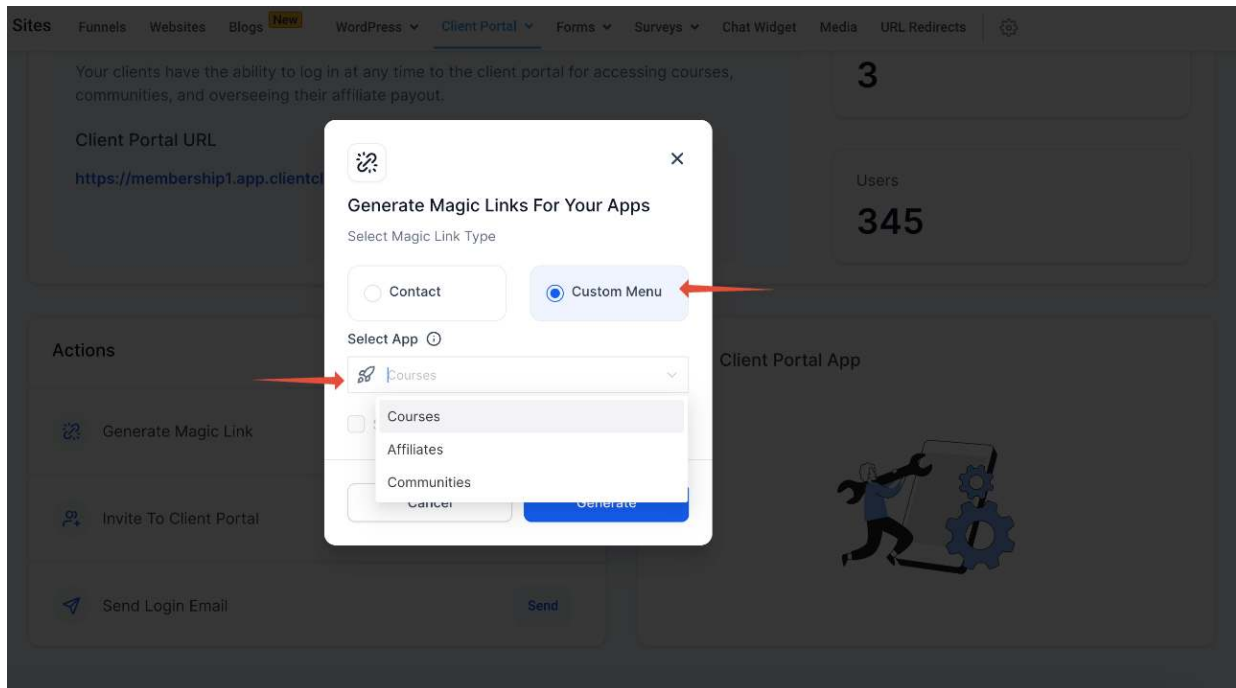
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- Select Magic Link Type:**
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  - ☐ Custom Menu
- Contact:**
  - Search by name,email
  - ☒ Send Email
- Buttons:** Cancel, Generate & Send

Red arrows indicate the changes between the two screenshots: the 'Send Email' checkbox is checked, and the 'Generate' button is replaced by 'Generate & Send'.

# Client Portal - Single Sign On (SSO) and Magic Links



1. **Go to Client Portal Dashboard:** Navigate to the client portal dashboard on Highlevel platform.
2. **Access Actions Menu:** Click on the "Actions" menu located in the dashboard.
3. **Generate Magic Link:** Select the "Generate Magic Link" option from the menu.
4. **Choose Relevant App:** Choose the relevant Contact or Client Portal child app (Courses, Communities, or Affiliates) for which you want to generate the magic link.
5. **Generate the Link:** Click on the "Generate" button to create the magic link for the selected app or contact
6. **Utilize the Magic Link:** Once generated, use the magic link to access the chosen app directly without the need for a separate sign-in process.

- Magic links can be seamlessly embedded as custom menu items within the client portal.
- To use Custom Menu magic links, go to Agency → Settings → Custom Links and add your desired link as a menu item

*Sub-Account and agency users can now enjoy the convenience of direct access to their respective child apps without undergoing a separate sign-in process.*

Did you find it helpful? Yes No

# Build God's House with Excellence



Whatever you do, let these verses inspire you to carry out all your tasks with dedication, excellence, and a sincere heart aimed at honoring God.

Colossians 3:23-24 "Whatever you do, work at it with all your heart, as working for the Lord, not for human masters, since you know that you will receive an inheritance from the Lord as a reward. It is the Lord Christ you are serving."

Proverbs 16:3 "Commit to the Lord whatever you do, and he will establish your plans."

Ephesians 6:7-8 "Serve wholeheartedly, as if you were serving the Lord, not people, because you know that the Lord will reward each one for whatever good they do, whether they are slave or free."

Galatians 6:9 "Let us not become weary in doing good, for at the proper time we will reap a harvest if we do not give up."