Making ClientPoint Accessible on Your Website:

This document aims to provide comprehensive guidance on making ClientPoint accessible for your prospects directly from your website.

ClientPoint Access: Utilizing URL Parameters

Introducing a seamless way to access any unique ClientPoint through URL Parameters, streamlining your experience with our platform. Below are the key details for utilizing this feature:

URL Format: {base_url}/proposal/unlock-view/proposalId/{proposalId}/pin/{pin}/email/{email}

Parameters:

- Your Custom ClientPoint Domain: {base_url} - (default as login.clientpoint.net)
- ClientPoint Unique ID: {proposalId}
- Recipient's Email: {email}
- ClientPoint Unique Pin: {pin}

Application Workflow:

Create a webpage with the below fields for your prospects to fill in:

- ClientPoint ID
  - prospects can fill it based on provided by the representative
- Recipient's Email:
  - prospects can fill this to track analytics
- Proposal Pin
  - prospects can fill it based on provided by the representative

             OR

  - generate this programmatically by using this ClientPoint's API endpoint

Once your prospect fills in the required fields, redirect them to the ClientPoint Access URL

Notes:

ClientPoint doesn't allow iframe on any third-party websites if you are planning to iframe then please reach out to your client-success coordinator for assistance

Please note that the application workflow described above is a suggested implementation from ClientPoint. However, you have the liberty to choose an alternative workflow that aligns with your preferences