**Manage Profile in the Customer Web Portal (moonstride)**

*Empower your customers to securely access, review, and update their personal and booking information online. The moonstride Customer Web Portal provides greater transparency and self-service for every client.*

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**1. Overview: Customer Web Portal Access**

moonstride enables clients to share a secure login URL with customers, granting them access to a personal web portal. Here, each customer can manage their own bookings and profile information whenever they need.

[Insert screenshot here: General view of Customer Web Portal main dashboard]

**2. Portal Invitation – How to Share Access**

You can share a portal invitation with a customer in two main ways after their passenger or main customer profile is created:

* **Option 1:** Click **Send Portal Invitation** in the customer or passenger details page.
  + [Insert screenshot here: Profile details screen with Send Portal Invitation option highlighted]
* **Option 2:** Use the "Share Portal Invitation" button available in other customer-related views, such as booking summary or quotation screens.
  + [Insert screenshot here: Alternative Share Portal Invitation entry point]

This opens a configuration screen where you can customise the email sent to the customer.

[Insert screenshot here: Portal invitation email setup screen]

Once sent, the customer receives an email with their personal login link.

**3. What Customers Can Do in the Web Portal**

With the moonstride Customer Web Portal, customers are able to:

* **View and manage booking details:** Instantly see all bookings with clear trip, payment, and status overviews.
* **See a price breakdown:** Review a detailed pricing summary for every booking and for each passenger.
* **Access and download itineraries:** View their complete, day-by-day or service-based itinerary for each trip, and download a PDF version for offline use.
* **View and update passenger information:** Access and (where allowed) update names, passports, preferences, and emergency contacts.
* **Check and make payments:** Review payment plans, see due dates and statuses, and securely pay online via “Proceed to Payment.”
* **View trip summaries:** Quickly check included services and get confirmation/PNR references.
* **Send and receive messages:** Communicate directly with the staff or other group members via the portal, using the Recent Messages feature, and view complete message history.
* **Monitor previous activity:** See the history of previous bookings, messages, and downloaded documents for inspiration or easy repeat bookings.

[Insert screenshot here: Customer Web Portal dashboard showing highlighted sections for booking overview, pricing, itinerary, passenger edit, and messages.]

**4. Step-by-Step: Customer Login & Profile Management**

* After accepting the invitation, the customer clicks the link and is prompted to create a secure password.

[Insert screenshot here: Portal email with login URL; password creation screen]

* Upon first login, the portal home/dashboard displays all their bookings and personal info.
* Customers may update their profile, view booking details, check or make payments, and review their invoice history—all through their private dashboard.

[Insert screenshot here: Customer Web Portal dashboard after logging in]

**5. See Also**

* [Send Portal Invitation](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Booking Management via Customer Portal](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Customer Invoice & Payment Self-Service](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)
* [Security and Access Overview](https://platform.openai.com/playground/prompts?preset=preset-llp5NhIOF1eArNsL6eNRDo41)

**Summary**

The Customer Web Portal in moonstride gives every client easy, secure access to their booking and payment information, saving you time on admin and improving customer satisfaction. Share the invitation, and your travellers manage their own details at their convenience.