

# 2. Client Area: Use Cases

## **Use Case #1: Onboarding a New Customer Portal**

When a client launches a new branded dashboard, add a Client Area record (e.g. “Acme Client Portal”) with its URL and API credentials. Assign it to the client’s account so the portal can immediately read/write CRM data (tickets, orders, analytics) without any manual integration steps.

## **Use Case #2: Linking Multiple Storefronts**

A merchant selling on Shopify and WooCommerce wants unified reporting. Create two Client Area entries (“Acme Shopify,” “Acme WooCommerce”) under the same owner. Both portals then push orders and customer interactions into the same client profile, giving your support and analytics teams a single source of truth.

## **Use Case #3: Configuring SSO Endpoints**

Your organization supports SAML-based SSO for both web and mobile apps. In Client Area, register “Acme Web SSO” and “Acme Mobile SSO,” store their assertion consumer URLs and certificate fingerprints, and generate OAuth keys. Users signing in on either channel seamlessly authenticate against the CRM’s identity provider.

## **Use Case #4: Driving Embedded Analytics Dashboards**

You’ve built a React widget that visualizes user engagement metrics. In Client Area, provision “Acme Analytics Embed,” supply its API token to the widget, and embed it in the client’s site. The dashboard pulls real-time KPIs (login rates, monthly spend) directly from the CRM without exposing any other data.

## **Use Case #5: Automated Support Routing**

Your support org uses separate desks for “Web Support” and “Mobile Support.” Create Client Area entries for each app, tag them with their respective Desks, and set up your ticket form to include the Client Area identifier. Incoming requests automatically flow into the correct queue based on which portal the user submitted from.

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