NEXUS CUSTOMER PORTAL

# Personalization and Management Guide

*Style C (Layout C): set up, personalize and maintain your portal*



November 2026

The Customer Portal is your attendees' Know Before You Go: one link with their agenda, speakers, travel, center details and content, branded to you and changing with each stage of the visit. This guide shows your team how to personalize the portal in Style C (Layout C) and keep it current.

Use the Contents below to jump to a task. Each section ends with **Related FAQs**: Nexus Support Center articles with more detail.

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# What's new in Style C

Style C replaces the side menu with a horizontal tab bar, adds a full-width hero banner, and gives you more control over the Home tab.

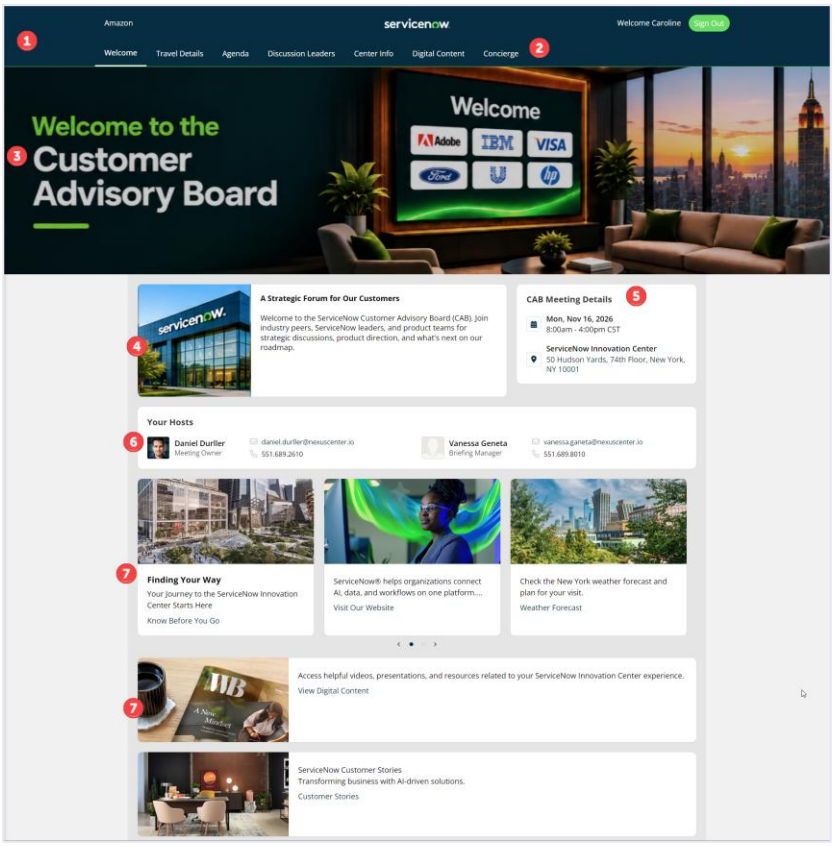
| Area | What's new in Style C |
|---|---|
| Navigation | Horizontal tabs across the top. Only enabled tabs show, in your order; tabs that don't fit move into a **More** menu. |
| Home tab | A full-width hero banner (**Greeting Image**), your greeting message, the visit's details, **Your Hosts**, and quick link cards. |
| Labels | You name the Home tab sections and choose your term for speakers (for example Discussion Leaders or Presenters). |
| Hosts and contact | Choose whether to show the Meeting Owner and Briefing Manager with email and phone, and whether attendees can email them or speakers. |
| Quick links | Each link is a card with an image, a description and a title line. Links can be grouped and saved as templates. |
| Styling | New controls for the hero banner, navigation gradients and active tab, pods and buttons. |
| Mobile | Works on desktop, tablet and phone; tabs become a scrollable bar on small screens. |

What stays the same: your tabs, tab order, media library, concierge, custom tabs and itinerary data carry over. If you switch a center back to Layout A or B, your Style C values are kept for later.

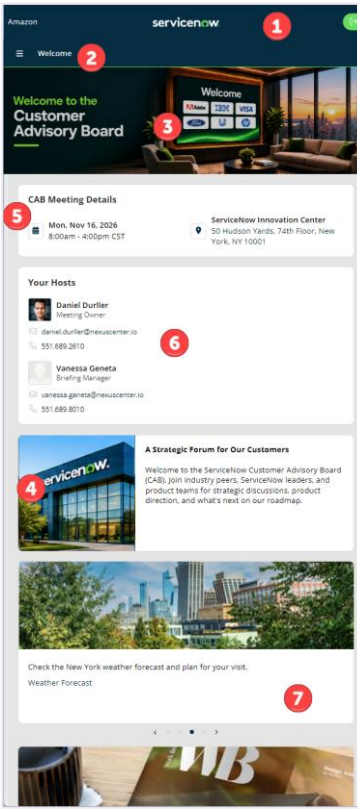
## The Welcome tab at a glance

The numbers on the screenshot match this list:

1. Header
2. Tabs (sections)
3. Hero image
4. Greeting message
5. Meeting details
6. Your Hosts (Meeting Owner and Briefing Manager)
7. Quick links




*The Welcome tab on a laptop or tablet*




*The Welcome tab on a phone*

**RELATED FAQS**

[Customer Portal Style C]

# Where settings live

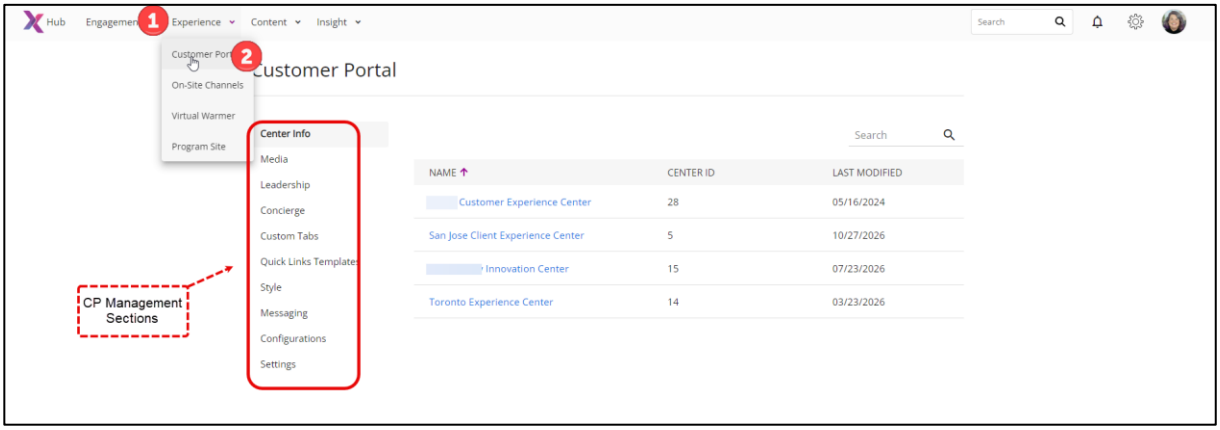
Admins and Managers with Customer Portal access make these changes in the Nexus Experience Hub. Sign in at hub.nexuscenter.io/platform with your instance name, then go to **Experience** → **Customer Portal**. Most settings apply per center (site), so check the **Center** selector before you edit.

| What you want to change | Where | Section |
|---|---|---|
| Turn on Style C, labels, hosts, contact options | Experience → Customer Portal → **Settings** | Turn on Style C |
| Colors, fonts, header, hero banner, logo | Experience → Customer Portal → **Style** | Branding and styles |
| Greeting message and image for each visit phase | Experience → Customer Portal → **Messaging** | Home screen |
| Quick links | Experience → Customer Portal → **Configurations** → **Quick Links** | Home screen |
| Which tabs show, their names, icons and order | Experience → Customer Portal → **Configurations** | Portal tabs |
| Center description, photos, video | Experience → Customer Portal → **Center** | Portal tabs |
| Leadership names, titles, bios | Experience → Customer Portal → **Leadership** | Portal tabs |
| Hotels, dining, transportation, attractions | Experience → Customer Portal → **Concierge** → your center | Portal tabs |
| Your own tabs (a demo site or nested pages) | Experience → Customer Portal → **Custom Tab** | Portal tabs |
| Videos and documents for every visit | Content → **Media** → Add Media | Portal tabs |
| Content for one visit only | Briefing Overview → **Experiences** | Portal tabs |
| Usage: visits, tab views, media engagement | Insight → **Reports / Analytics** | Ongoing management |

Visit details (date, time, room, agenda, speakers, travel) come from the Engagement Hub automatically. You change them on the visit, not in the portal.

## Open the Customer Portal settings

In the Experience Hub, open **Experience** and select **Customer Portal**. The Customer Portal management sections are listed on the left.




*The Experience menu and the Customer Portal management sections*

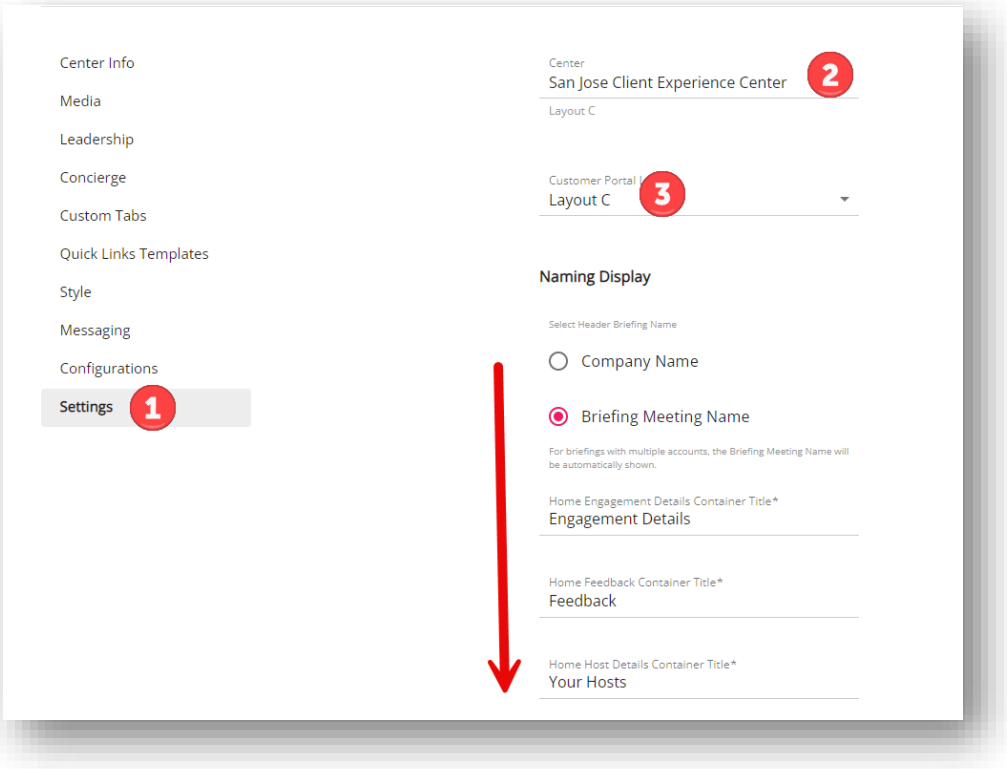
**RELATED FAQS**

Nexus Customer Portal Personalization and Maintenance

# Turn on Style C

Style C is switched on per center in **Settings**, and it won't save until every required field is filled.

1. Go to **Experience** → **Customer Portal** → **Settings** and pick your center.
2. In **Customer Portal Layout**, choose **Layout C**. The Style C sections appear below.
3. Fill in each section, using the table below as a guide.
4. Click **Save**. If Save stays grey, look for a red label: that required field is blank.

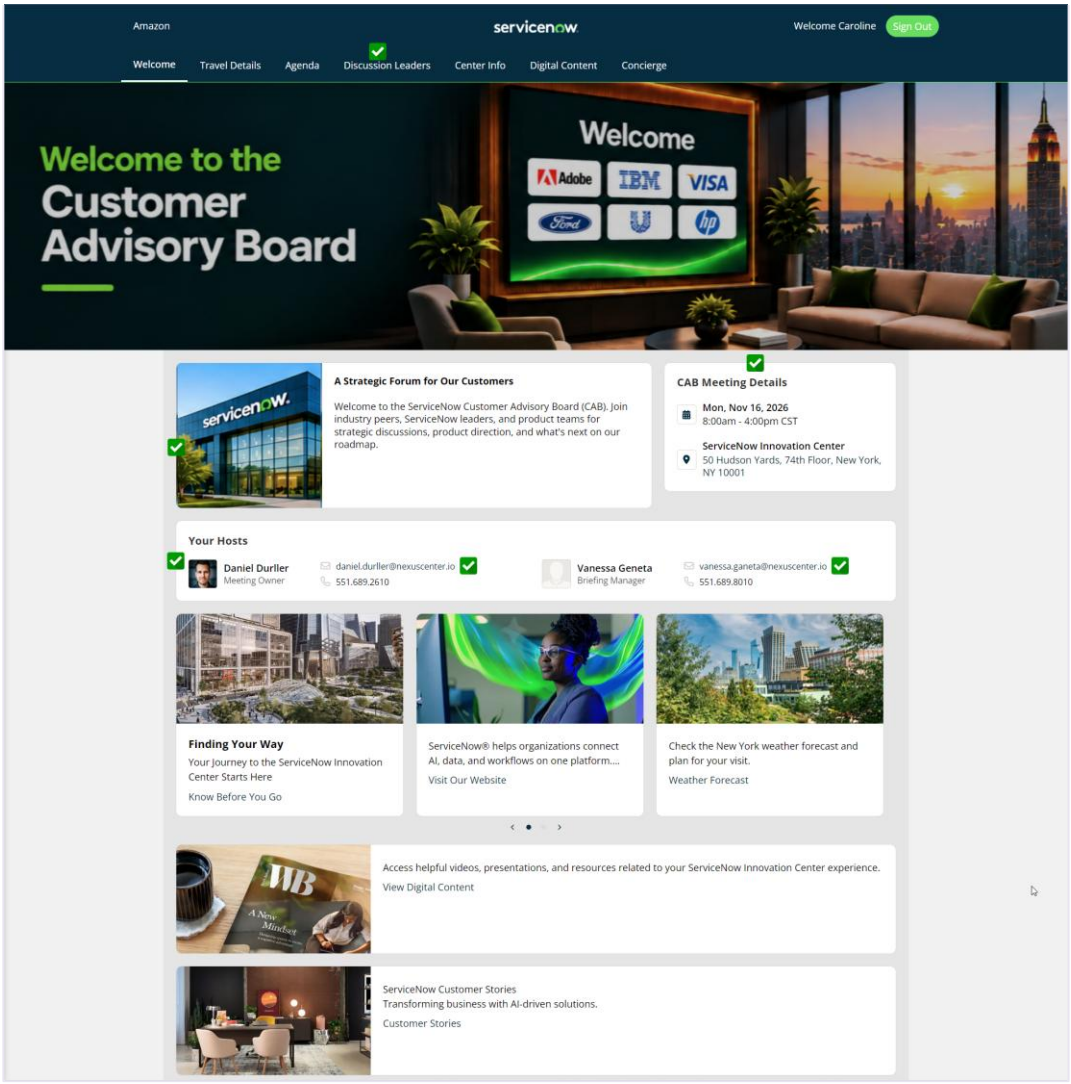



*Settings: (1) Settings, (2) your center, (3) Layout C*

## Settings, descriptions and recommendations

| Section | Setting | What it does | Our recommendation |
|---|---|---|---|
| Naming Display | **Select Header Briefing Name** (required) | Shows either the **Company Name** or the **Briefing Meeting Name** at top left of the header | Meeting name if your visit names are written for customers; otherwise company name |

| Section | Setting | What it does | Our recommendation |
|---|---|---|---|
| Naming Display | **Home Engagement Details Container Title** (required, 255 characters) | Title of the visit details box on the Home tab | Your Visit |
| Naming Display | **Home Feedback Container Title** (required, 255 characters) | Title of the feedback box | Share Your Feedback |
| Naming Display | **Home Host Details Container Title** (required, 255 characters) | Title of the hosts box | Your Hosts |
| Naming Display | **Speaker Label** (required, 255 characters) | Your word for speakers, used on tabs and the agenda | Your own term: Speakers, Presenters, Discussion Leaders |
| Home Engagement Details Display | **Show Meeting Room**, **Show Center Address** | Adds the room and address to the visit details box | Address on; room on if rooms are set before the visit |
| Home Host Details Display | **Show Meeting Owner**, **Show Briefing Manager**, each with **Display Email** and **Display Phone Number** | Who appears under Your Hosts, with photo and contact details | Both on with email; phone if your team takes calls |
| Email Feature | **Allow Contact Meeting Owner**, **Allow Contact Briefing Manager** | Lets attendees email that host from the portal. Each appears only when that host is shown | On for whoever handles attendee questions |
| Email Feature | **Allow Contact Speaker**, **Allow Send Emails General Link** | Lets attendees email speakers, or share a general email link | Speaker contact off unless speakers expect it |
| Other | **Show Blurred Background** | Blurs the space around greeting images so they look clean on phones | On |




*Where each setting appears on the Welcome tab*

**RELATED FAQS**

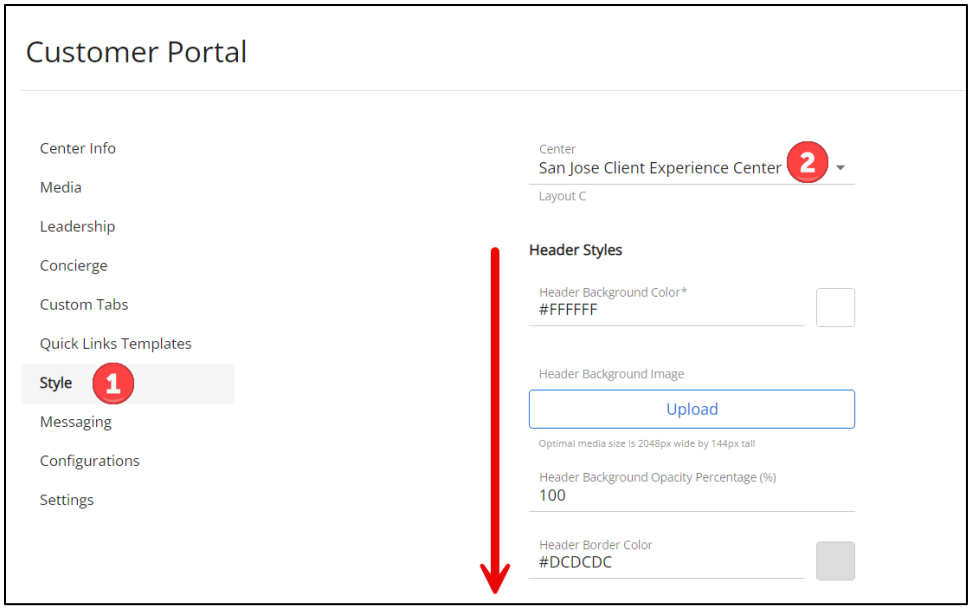
[Customer Portal Style C]

# Branding and styles

Your brand colors, fonts and images are set in **Experience → Customer Portal → Style** for each center that uses Layout C. Colors are HEX values (for example #062D41), opacity runs from 0 (clear) to 100 (solid), and changes show as soon as you save; refresh the portal if they don't.

| Style group | Settings | Tips |
|---|---|---|
| Header Styles | Header Color, Header Border Color, Header Text Color, **Header Image** (2031 x 144), **Logo Image** (400 x 400), Opacity, Sign Out Button Color, Sign Out Button Text Color | Header image is a thin strip: use a texture or gradient, not a photo or text. Use a logo version that reads on the header color. |
| Main Navigation Styles | Background Top / Bottom Gradient, Icon Color, Text Color, Active Tab Top / Bottom Gradient, Active Tab Text Color, Opacity | Keep the bar one color family; make the active tab clearly different so attendees know where they are. |
| Home Page Hero Content | **Greeting Image** (1366 x 444), Greeting Background Color, Greeting Overlay Opacity | The hero is wide and short. Keep the subject centered; raise the overlay (30–50%) if text sits on a busy photo. |
| Pod Styles | Pod Header Color, Pod Text Color, Primary and Secondary Pod Gradients and Opacity, Pod Corner Radius, Itinerary Pod Stroke and Gradient Color | Pods are the cards on each tab. Match the corner radius to your buttons. |
| General Styles | Font Type, Primary and Secondary Brand Color, Hyperlink Color, Subheader Text Color and Weight, Background Color, Button Color and Corner Radius, Rating Pod Color, Sidebar and Browser Background Color, Logo Screen Image | Send Nexus your font files to load a brand font. Check that link and button text is easy to read on its background. |

To open the style options, go to **Experience → Customer Portal → Style**, choose your center, then work through each style group.




*Style: (1) Style, (2) your center, then each style group from top to bottom*

Branding best practices:

- **Start from two or three brand colors.** A dark primary for the header and navigation, an accent for the active tab and buttons, and a light neutral background.
- **Check contrast.** Header text, tab text and button text should be easy to read on their backgrounds, including on a phone in daylight.
- **Use tab icons from your brand library** where your icon set covers the tabs.
- **Keep images free of text.** The portal adds titles and messages itself, and text inside images is cut off on small screens.

**RELATED FAQS**

What are the style settings for the Customer Engagement App (CE App)?

What are the best practices for logos?

Customer Portal Style C

# Home screen

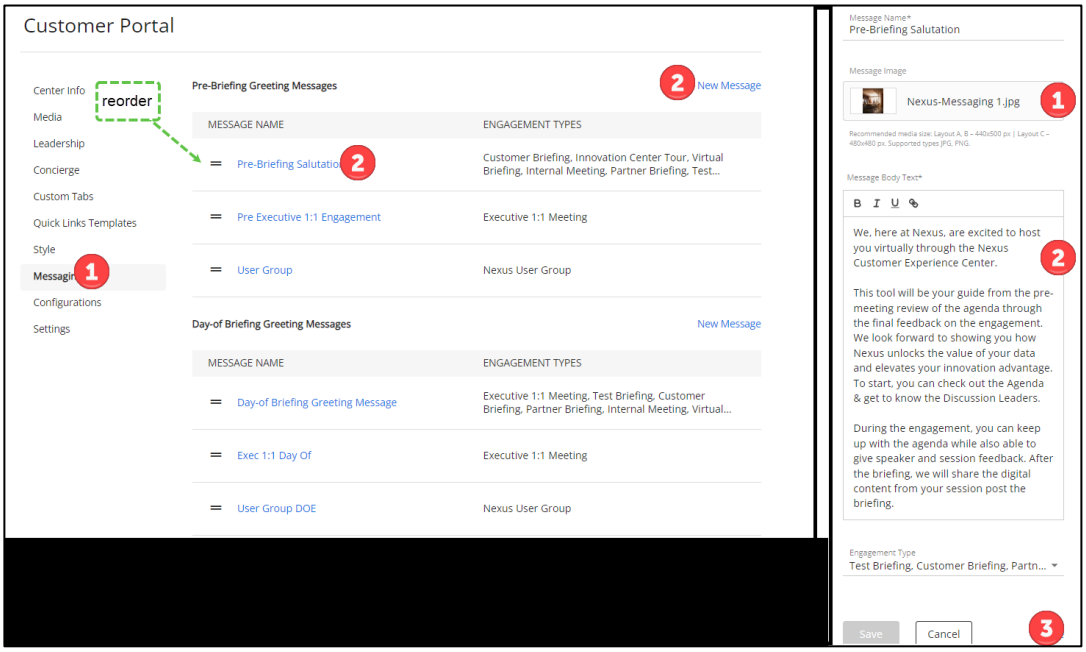
The Home tab is the first screen every attendee sees, so it carries your greeting, the visit details, the hosts and your quick links. From top to bottom it shows the hero banner, the greeting message, visit details (date, time, center, address, room), Your Hosts, then the quick link cards.

## Greeting messages

Set a greeting for each visit phase in **Experience** → **Customer Portal** → **Messaging**. You can set one default set of messages for every visit, and add more default sets for specific engagement types.

1. Choose the engagement type and the phase: **Pre**, **Day Of** or **Post**.
2. Optional: upload an image (PNG or JPG, 440 x 500).
3. Add the message text: keep it under 450 characters.
4. Optional: add more slides to make a carousel. Each slide uses the same image size.
5. Click **Save**.

To give one visit its own greeting, add a custom salutation in **Briefing Overview** → **Experiences**. It replaces the default messages for that visit.




*Messaging: the default greeting messages for each phase*

Writing tips:

- **One job per message.** Before the visit: welcome and point to the agenda. Day of: arrival and check-in. After: thanks, content and feedback.
- **Keep visit-specific facts out.** One message serves every visit, and the portal already shows the date, room and hosts.

- **Use matching images** across the three phases, such as the lobby before, a session during and the building after.

**Recommended content:** start from these messages, replacing {Company}, {Center} and {City} with your names.

| Phase | Message | Characters |
|---|---|---|
| Pre-Briefing | Welcome! We're looking forward to hosting you at the {Company} {Center}. Use this portal to review your agenda, meet your speakers and find everything you need before you arrive. If you have questions ahead of your visit, your hosts are listed below and happy to help. | 268 |
| Day Of (before the first session) | Welcome to the {Company} {Center}! Please check in at reception when you arrive and we'll take you to your meeting room. Your agenda for today is in the Agenda tab, and local weather and parking details are in the quick links below. | 232 |
| Day Of (during sessions) | We're glad you're here. Follow along in the Agenda tab to see what's next, learn more about each speaker, and share your feedback on each topic as you go. Your input helps us make every visit better. | 199 |
| Day Of (after the last session) | Thank you for spending the day with us. Before you go, please take two minutes to tell us how we did. Your feedback goes straight to the team that planned your visit. | 166 |
| Post-Briefing | Thank you for visiting the {Company} {Center}. Presentations and resources from your visit will be shared here as they become available. If you haven't yet, we'd value your feedback, and your hosts are always happy to help with next steps. | 239 |

RELATED FAQS

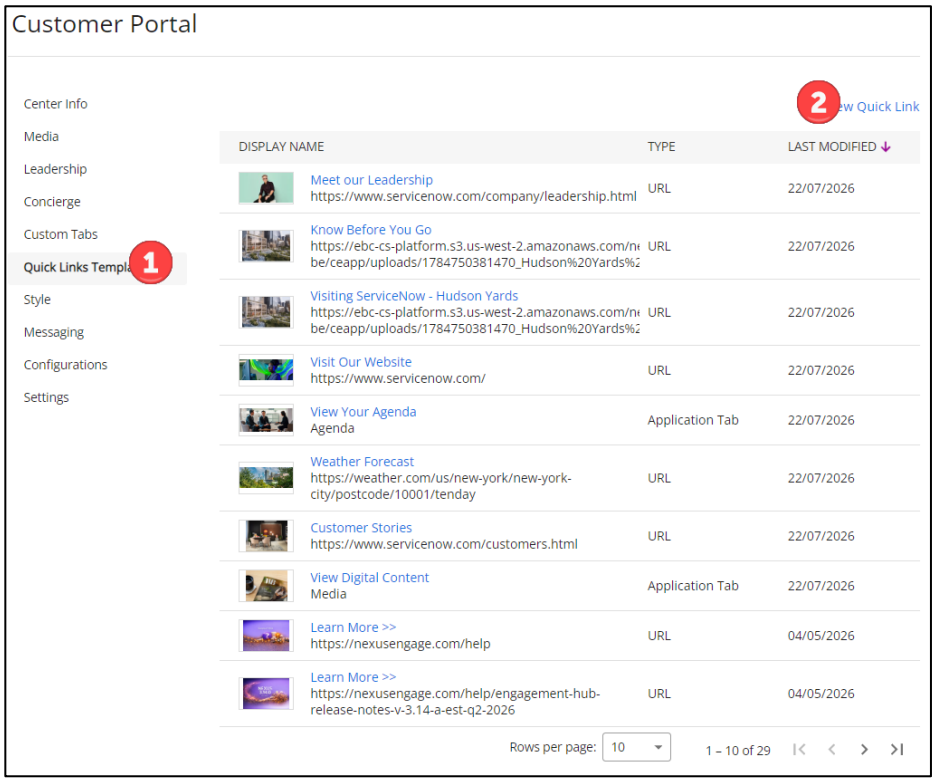
How do I add multiple default salutations?

How to add a Custom Salutation

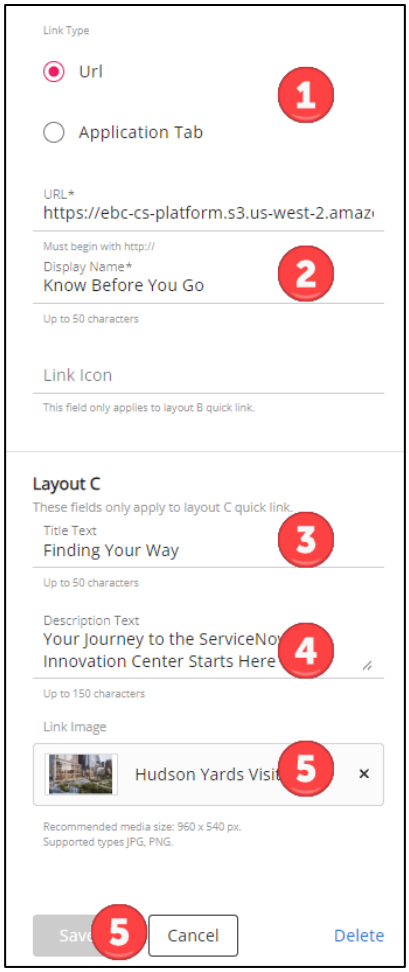
## Quick links

Quick links are cards on the Home tab that take attendees to a tab or a web page. Set them in **Experience → Customer Portal → Configurations → Quick Links**.

1. Select your **Center** and check that the layout shown under it says **Layout C**.
2. Optional: click **Add Group** to group related links.
3. Click **Add Quick Link**, or pick one from **Quick Link Templates**.
4. Fill in **Title Text** (the link line under the image), **Description Text** (one line, under 90 characters) and **Link Image** (960 x 540, JPG or PNG).
5. Choose where it goes: a URL, or an application tab such as Agenda.
6. Click **Save**.




*Quick Links: (1) Quick Links, (2) Add Quick Link*



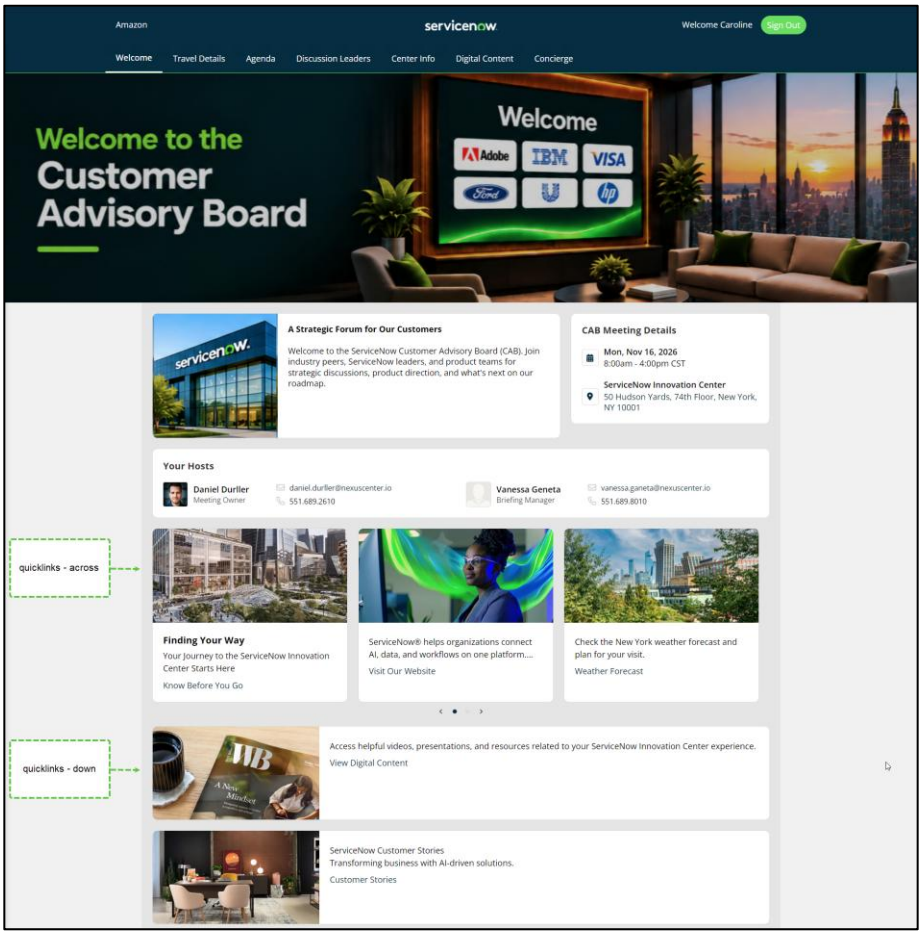

*The Quick Link Details form with Title Text, Description Text and Link Image*

Recommended starting set:

| Title Text | Description Text (recommended content) | Goes to |
|---|---|---|
| View Your Agenda | See your sessions, times and speakers for every day of your visit. | Agenda tab |
| Your Itinerary | Hotel, flights, transportation and dining plans for your trip. | Travel Details tab, if you track hotels and travel |
| Local Weather | Check the forecast in {City} before you travel. | A weather page for your center's city |
| View Our Website | Learn more about who we are and what we do at {Company}. | Your home page |
| View Our Leadership | Meet the leaders guiding {Company}. | Your leadership page |

| Title Text | Description Text (recommended content) | Goes to |
|---|---|---|
| Sustainability | See our commitments and progress toward a more sustainable future. | Your sustainability page |
| Customer Stories | See how organizations like yours succeed with {Company}. | Your customer stories, case studies or solutions page |
| Parking Instructions | Where to park and how to find the entrance when you arrive. | Your parking page or a PDF, if you have one |

Keep all link images in one style (all brand graphics or all photos), with no text in the image. Open every link after saving to check it lands on the right page. Save links you'll reuse as **Quick Link Templates**.




*The Welcome tab with a full set of quick links*

**RELATED FAQS**

Customer Portal Style C

# Portal tabs

Each tab pulls from one place in the Hub, so updating a tab means updating its source. Turn tabs on, rename them and set their order in **Experience** → **Customer Portal** → **Configurations**; reload the portal to see the change. Keep names to one or two words and aim for six or seven tabs, since extra tabs move into **More**.

In the **Application Tabs** list, the Availability column shows which visit phases (Pre-Briefing, Day-of-Briefing, Post-Briefing) each tab appears in.

| Tab (example name) | What attendees see | Where you manage it |
|---|---|---|
| Welcome (Home) | Hero banner, greeting, visit details, hosts, quick links | Settings, Style, Messaging, Quick Links (sections above) |
| Travel Details (Itinerary) | Each attendee's own travel by date: hotel with check-in, check-out and reservation number, transportation, dining, flights, plus the briefing itself with a View Agenda button | Itinerary records on the visit in the Engagement Hub. Nothing to set in the portal |
| Agenda | Sessions by day with times, descriptions and speakers; each session expands to show **View BIO** | The visit's agenda in the Engagement Hub. Display options in the Agenda tab configuration (below) |
| Speakers (Discussion Leaders) | A card for each speaker with photo, title and **View BIO** | Speaker profiles in the Engagement Hub; the tab name follows your **Speaker Label** |
| Center Info | Photo gallery, your center description, address, a Leadership card and a brochure to email or download | **Center**: image or video (PNG, JPG, MP4, GIF), header up to 250 characters, body up to 1,000. **Leadership**: name, title, bio and photo, or a quick link to your website |
| Digital Content | Video and PDF cards attendees can download or email to themselves | **Content** → **Media** → **Add Media** for every visit (shown by **Industry** and **Site** flags); **Briefing Overview** → **Experiences** for one visit only, which shows first |

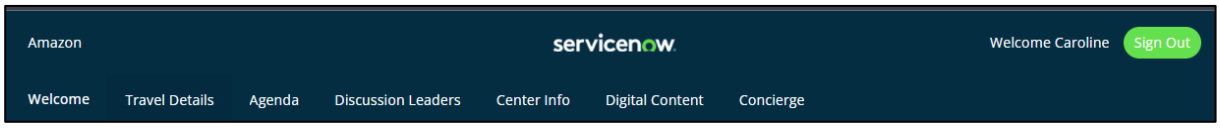
| Tab (example name) | What attendees see | Where you manage it |
|---|---|---|
| Concierge | Categories (Hotels, Restaurants, Transportation, Special Attractions) that open to places with photos, website, address, phone and an email button | **Concierge** → your center. Categories nest, each with its own image and text |
| Feedback | Day-of and post-visit surveys; topic ratings appear on the agenda | Feedback is set for day-of, post-visit or both. See Feedback, below. |
| Custom tabs | Your own page: a **URL tab** (such as a demo site) or a **nested tab** with up to 3 levels of categories | **Custom Tab**. Make it a default tab, or add it to a single visit |



Application Tabs

| TAB NAME | PAGE TITLE | AVAILABILITY |
|---|---|---|
| Welcome | Home | Pre-Briefing, Day-of-Briefing, Post-Briefing |
| Feedback | Feedback | Pre-Briefing, Day-of-Briefing, Post-Briefing |
| Travel Details | Travel Details | Pre-Briefing, Day-of-Briefing |
| Agenda | What's on tap for today | Pre-Briefing, Day-of-Briefing, Post-Briefing |
| Discussion Leaders | The Nexus Team | Pre-Briefing, Day-of-Briefing, Post-Briefing |
| Center Info | Upcoming Events | Pre-Briefing, Day-of-Briefing, Post-Briefing |
| Local Resources | Local Resources | Pre-Briefing, Day-of-Briefing |
| Content | We'll be loading the presentation a... | Pre-Briefing, Day-of-Briefing, Post-Briefing |
| Engagement Orchestration | Nexus Solutions | Pre-Briefing, Day-of-Briefing, Post-Briefing |
| Map | Location Infomation | Disabled |
| Survey Link | Feedback | Disabled |

*Application Tabs in Configurations: tab names, page titles and availability*




*The tab bar as attendees see it*

## Agenda tab options

In the Agenda tab configuration:

- **Show Speakers** is on by default. Keep it on so attendees can open speaker bios from each session.
- **Show Itinerary** adds travel items to the agenda timeline. It is available only when itinerary sync is enabled; otherwise it is greyed out.
- Itinerary types (Hotel, Ground Transportation, Restaurant, Air Arrival, Air Departure, Other Entertainment) can be turned off individually if you don't book them.

> **RELATED FAQS**
> Customer Portal Agenda Configurations

## Content tips

- **Digital Content:** give every file a clear title (cards cut long titles short) and a 960 x 540 thumbnail.
- **Center Info:** write the body for a first-time visitor: what to expect, how to arrive, what to bring.
- **Concierge:** pick four to six places per category, close to the center, and check them twice a year.

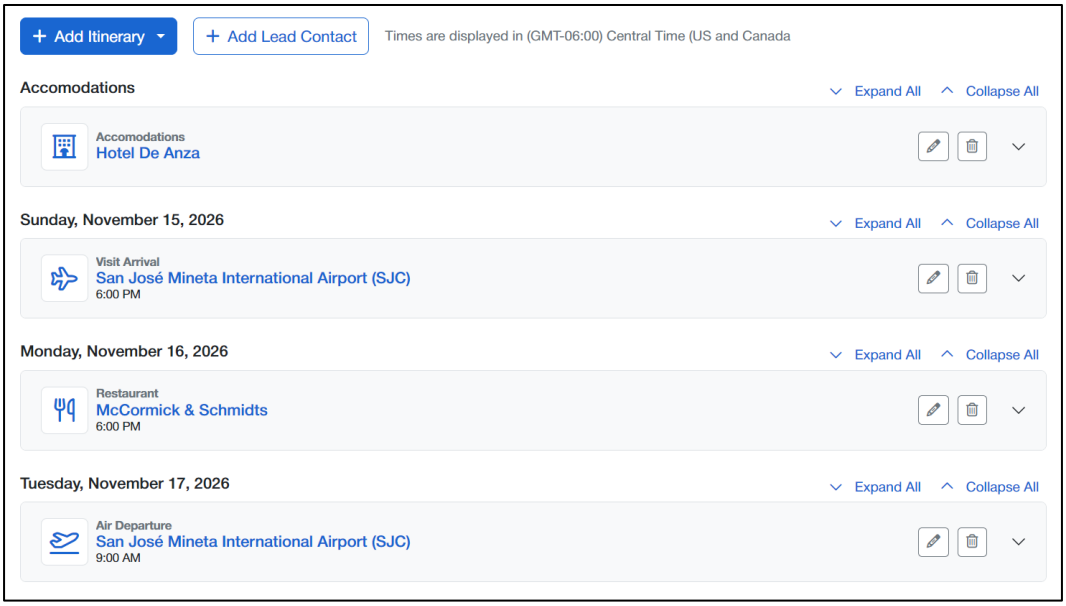
# Setting up each tab

Work through the tabs in this order: Center Info and Digital Content take the most preparation, and the agenda, speaker and travel tabs fill themselves from each visit.

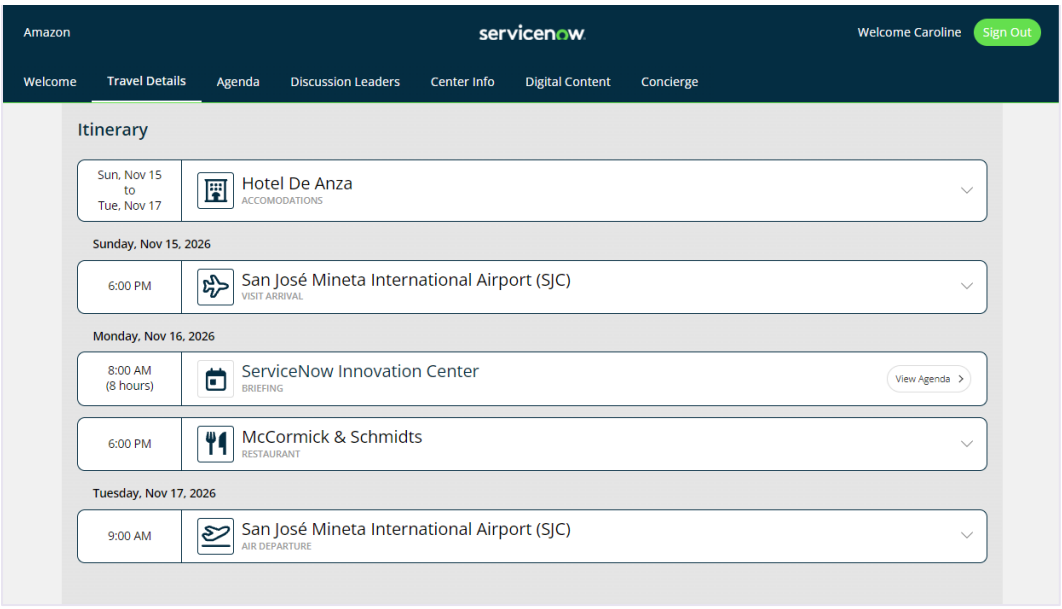
## Travel Details (Itinerary)

Travel Details shows each attendee only their own travel, grouped by date. A hotel card shows check-in and check-out times, the reservation number and the hotel's address, phone and website; the briefing itself appears with a **View Agenda** button.

1. On the visit in the Engagement Hub, add an itinerary record for each attendee: hotel, ground transportation, restaurant, flight arrival or departure, or other entertainment.
2. Fill in the times, confirmation number and provider details.
3. The record appears in that attendee's portal automatically.




*Itinerary records on a visit in the Engagement Hub*




*The Travel Details tab with a hotel card and the briefing below it*

**RELATED FAQS**

How to configure the Itinerary features

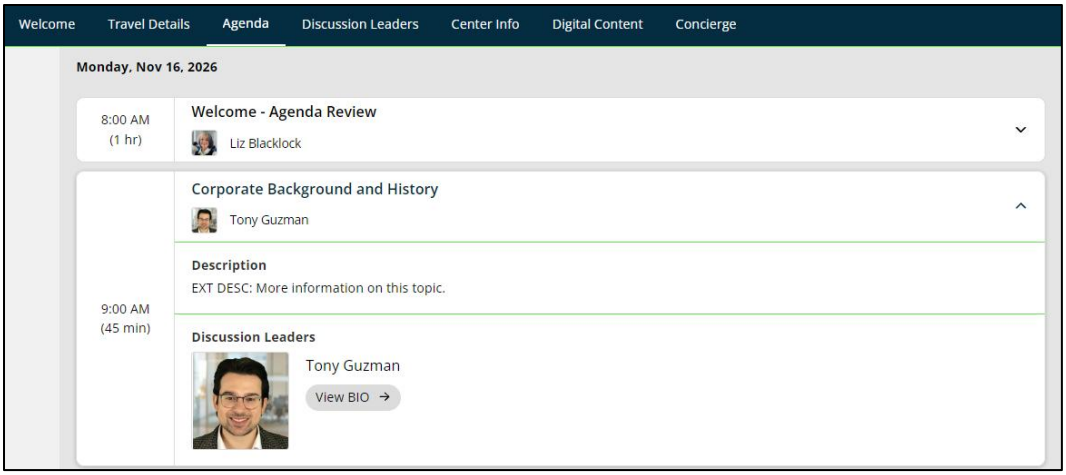
Add/Edit Itinerary Item

## Agenda

The Agenda tab lists sessions by day with times and lengths; each session opens to show its description and speakers, with a **View BIO** button.

1. Build the agenda on the visit in the Engagement Hub, with a customer-facing description for each session.
2. Assign speakers to each session.
3. Check the Agenda tab options (above) for speakers and itinerary.

**Recommended content:** write session descriptions for the attendee in one to three sentences: what the session covers and why it matters to them. Leave internal notes out of the description field.




*The Agenda tab with a session open, showing its description and discussion leaders*

**RELATED FAQS**

Customer Portal Agenda Configurations

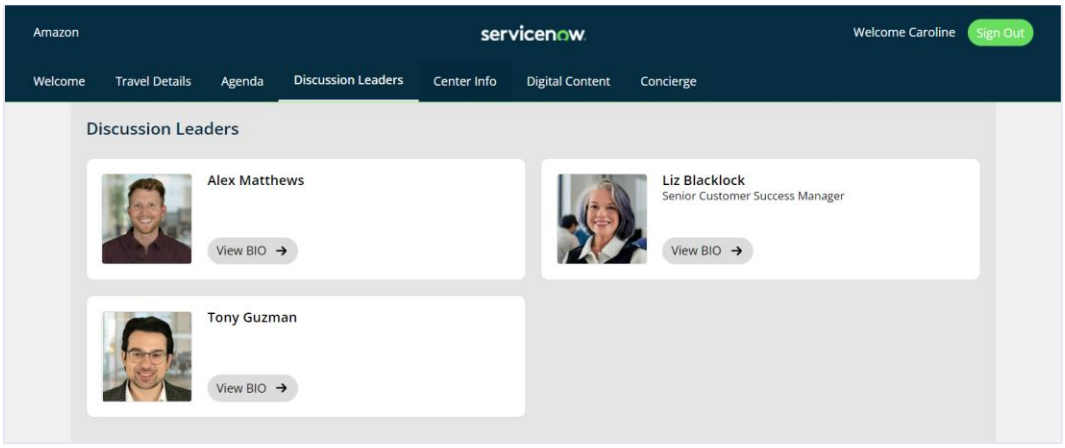
Agenda Topics and Meals

## Speakers

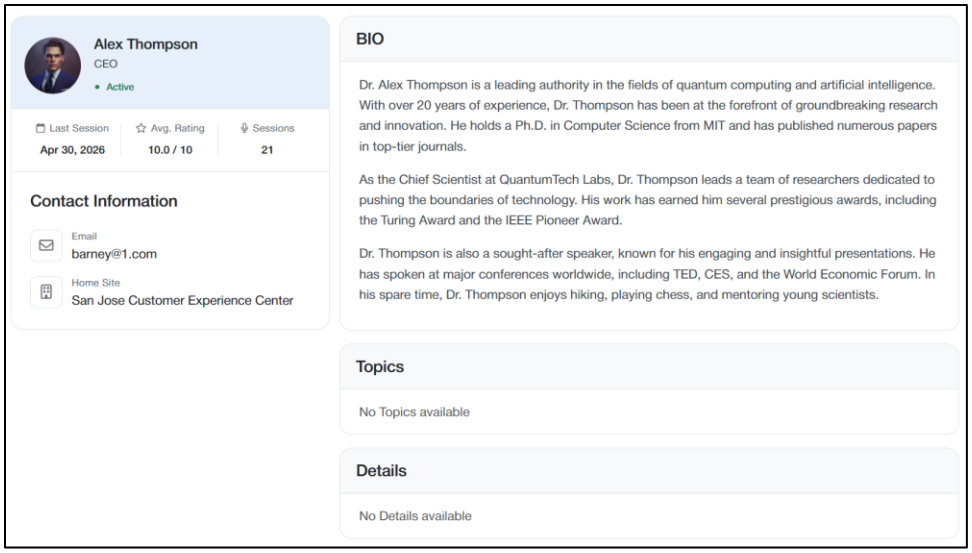
The Speakers tab shows a card for everyone speaking on the visit, named with your **Speaker Label**.

1. Keep speaker profiles in the Engagement Hub current: name, title, photo and bio.
2. Speakers appear on the tab when they are assigned to a session on the visit.

**Recommended content:** a square, well-lit headshot, the speaker's job title, and a bio of three to five sentences focused on what they do for customers.




*The Speakers tab (named Discussion Leaders here) with speaker cards*




*The matching speaker profile in the Engagement Hub*

RELATED FAQS

Dynamic Speaker Profile & Management

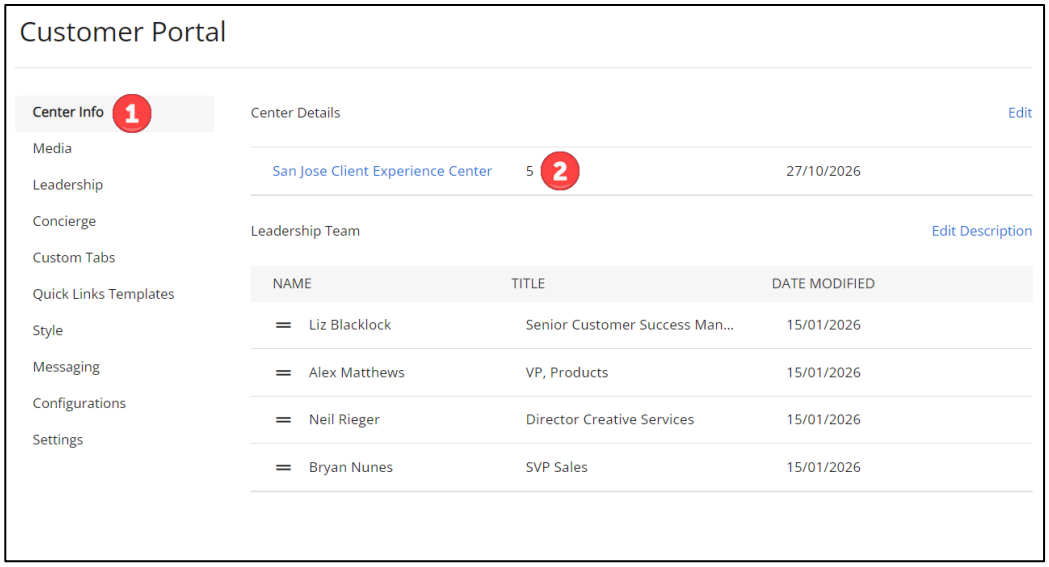
## Center Info

Center Info introduces your center: a photo gallery or video, a header and description, the address, leadership and an optional brochure.

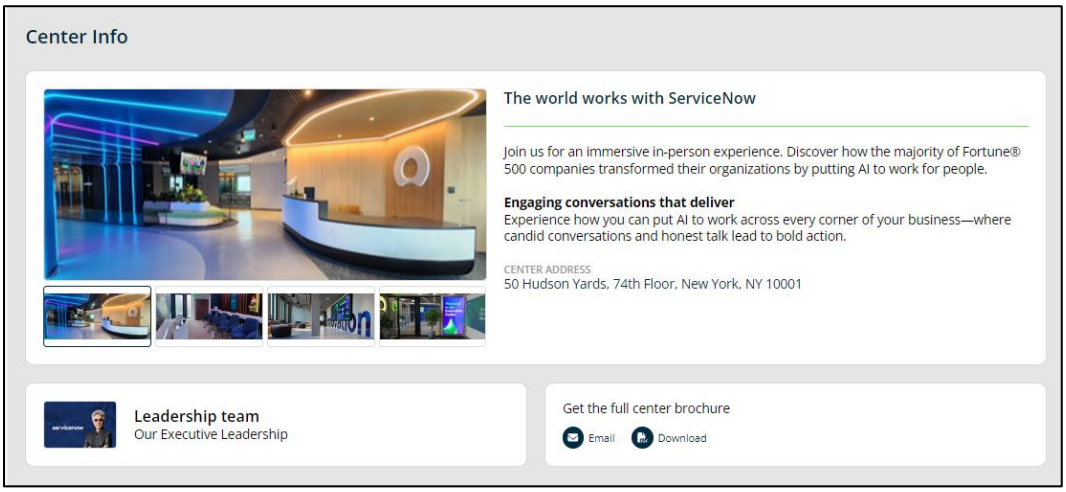
1. Go to **Experience** → **Customer Portal** → **Center** and pick your center.
2. Upload photos or a video (PNG, JPG, MP4 or GIF). The first is shown large, the rest as thumbnails.
3. Add a header (up to 250 characters) and a description (up to 1,000 characters).
4. Add your brochure or visitor guide if you have one; attendees can email or download it.
5. Click **Save**.

**Recommended content:**

- Header (33 characters): Welcome to the {Company} {Center}
- Description (502 characters): The {Company} {Center} in {City} is where we bring customers, partners and our teams together to solve real business challenges. Your visit is built around your goals, with sessions led by the people closest to work. What to expect: a welcome from your hosts, focused discussions and demonstrations, and time to connect with our leaders. Before you arrive: review your agenda and travel details in this portal, bring a photo ID for check-in, and see the quick links for parking and local weather.
- Photos: four to six images of your lobby, briefing rooms and demo spaces, without identifiable people.




*Center Info: (1) Center Info, (2) the center to edit*




*The Center Info tab: gallery, description, address, leadership and brochure*

**RELATED FAQS**

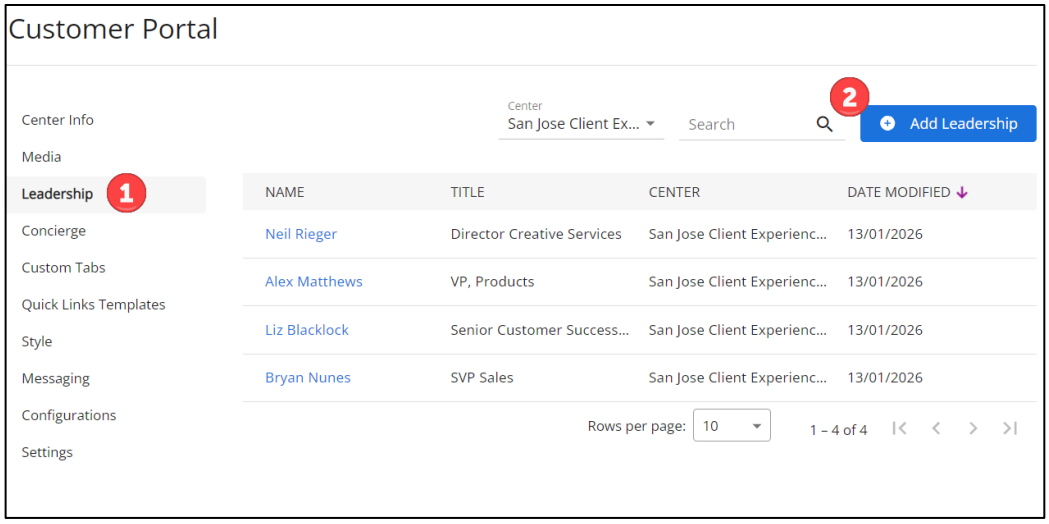
Center Info

## Leadership

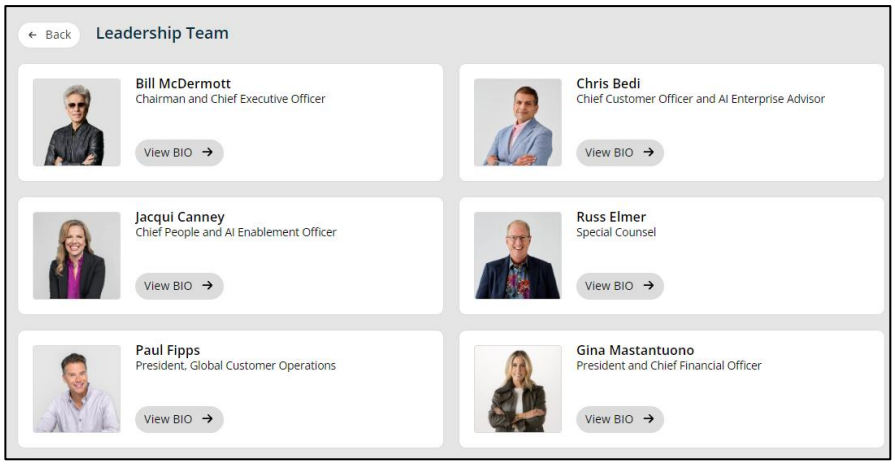
Leadership appears as a card on the Center Info tab. You can manage it in the portal or point to your website.

- **Option 1, managed in the portal:** go to **Experience → Customer Portal → Leadership** and add each leader's name, title, photo and bio.
- **Option 2, a link to your website:** add a **View Our Leadership** quick link to your leadership page, so your marketing team keeps it current.

**Recommended content:** Option 2 for most clients, since it never goes out of date.




*Leadership: (1) Leadership, (2) Add Leadership*




*The Leadership Team page in the portal*

**RELATED FAQS**

Leadership

## Digital Content

Digital Content holds the videos and documents attendees can watch, download or email to themselves. It combines two kinds of content.

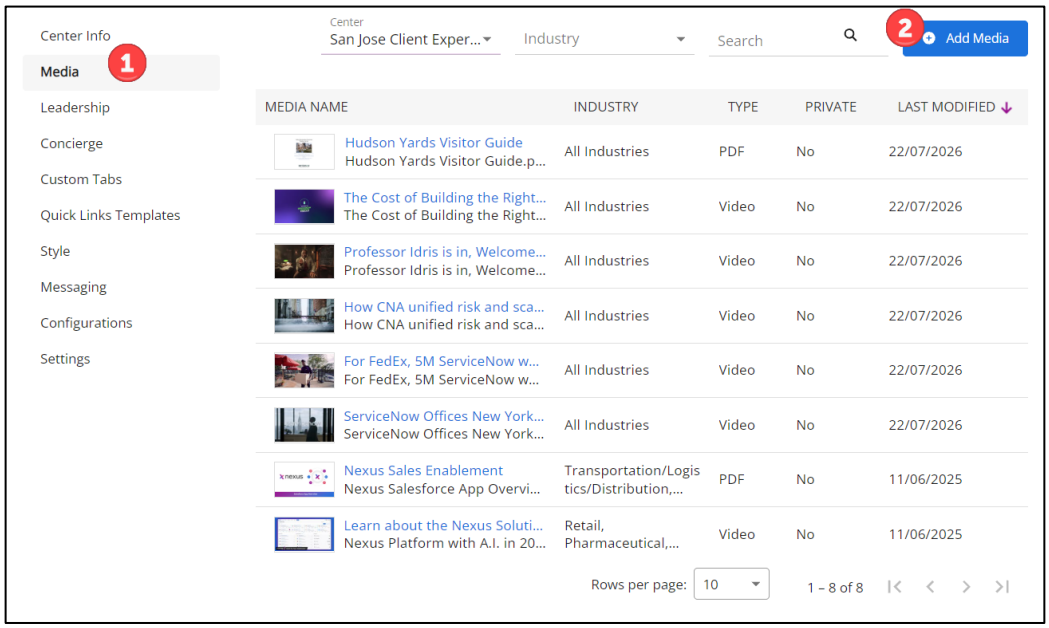
| Kind | Use it for | Where | Who sees it |
|---|---|---|---|
| Media library | Content for every visit: company and center videos, customer stories, sustainability, visitor guides | **Content** → **Media** → **Add Media** | Visits that match the **Industry** and **Site** flags you set |

| Kind | Use it for | Where | Who sees it |
|---|---|---|---|
| Visit content | Content for one visit: presentations, session recordings, review documents | **Briefing Overview** → **Experiences** on the visit | That visit only; shows first and appears right away |

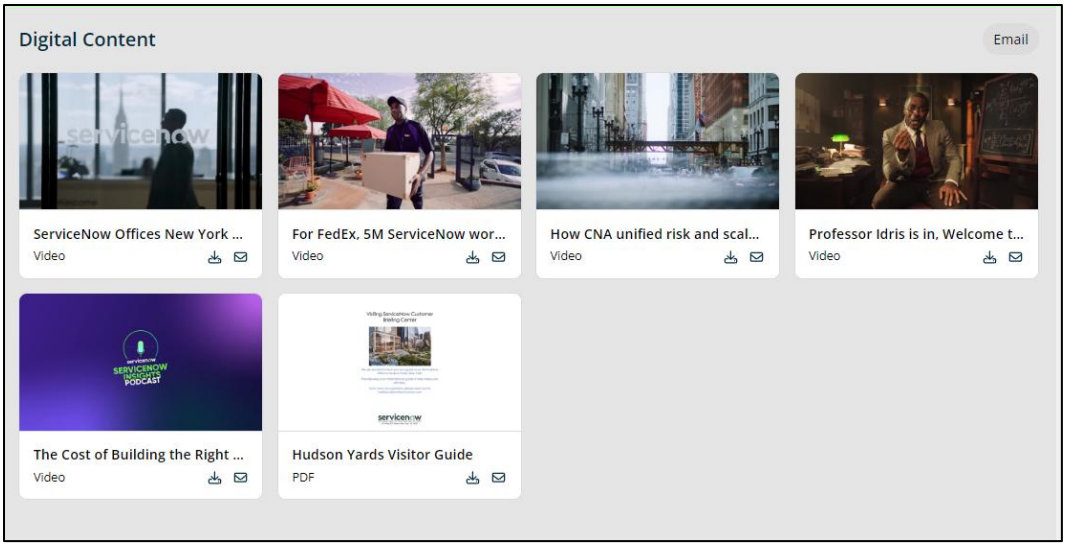
1. Click **Add Media** and upload the file (PNG, JPG, MP4, GIF or PDF).
2. Give it a short, clear title; long titles are cut off on the card.
3. Add a 960 x 540 thumbnail.
4. Set the **Industry** and **Site** flags.
5. Click **Save**.

You can also add PowerPoint files (.ppt and .pptx) and web links. Link names can be up to 100 characters and URLs up to 255.

**Recommended content:** a starter library of five to eight items: a center welcome video, a visitor guide PDF, two or three customer stories, a sustainability story and a company overview.




*Media: (1) Media, (2) Add Media*




*The Digital Content tab as attendees see it*

> **RELATED FAQS**
> Customer Portal Media
> How do I add customer-specific digital content or media to a briefing?
> I want to add or edit the related media items
> Supported Media Formats

## Concierge

Concierge shares local recommendations by category. Each category opens to a list of places, and each place shows photos, a description, website, address, phone and an email button. Nexus sets up the first version; you keep it current.

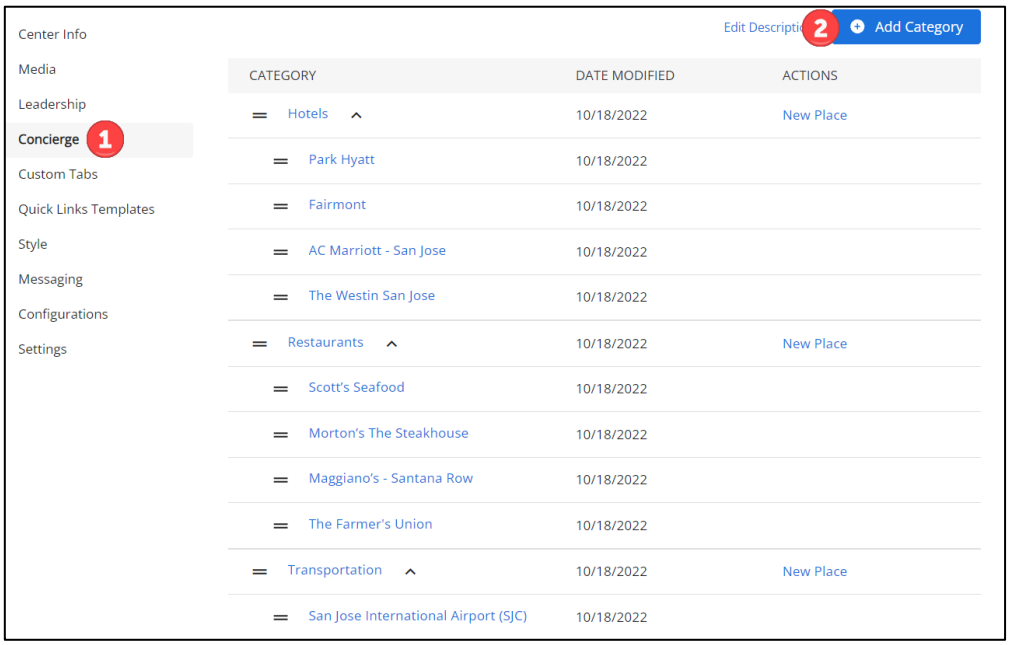
1. Go to **Experience** → **Customer Portal** → **Concierge** and pick your center.
2. Use **Click to Add** for a category, then add places inside it. Categories can nest.
3. Use **Click to Edit** to change an image or text at any level.
4. Set where it shows: by center, or on a single visit.

**Recommended content:**

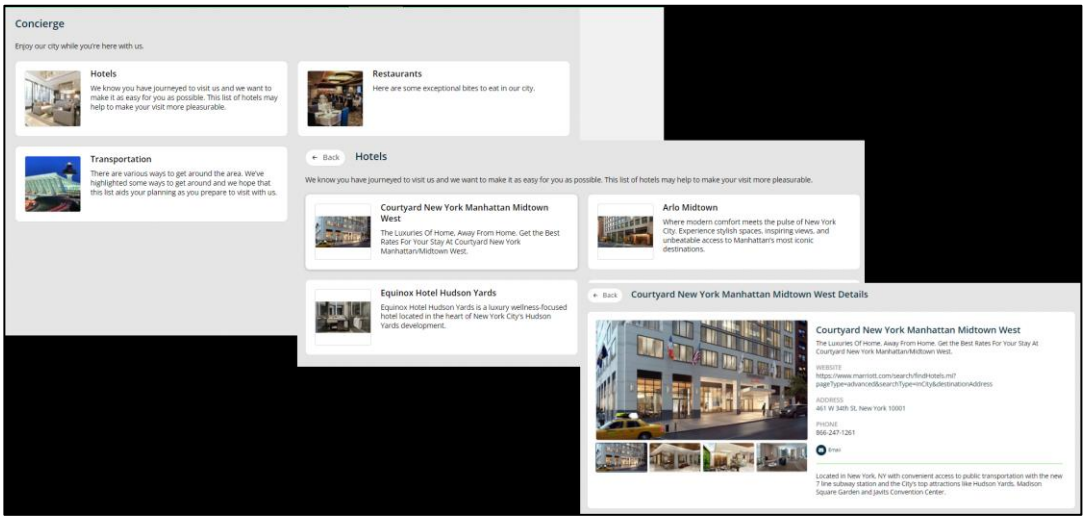
| Category | Intro text |
|---|---|
| Hotels | Our recommended hotels near the {Center}, chosen for comfort and an easy trip to your meeting. |
| Restaurants | Our favorite places to eat and meet near the {Center}. |
| Transportation | The easiest ways to get to the {Center} from the airport and around {City}. |

| Category | Intro text |
| --- | --- |
| Special Attractions | Things to see and do in {City} if you have time before or after your visit. |

Page intro: Enjoy our city while you're here with us. Aim for four to six places per category, close to the center.




*Concierge: (1) Concierge, (2) Add Category*



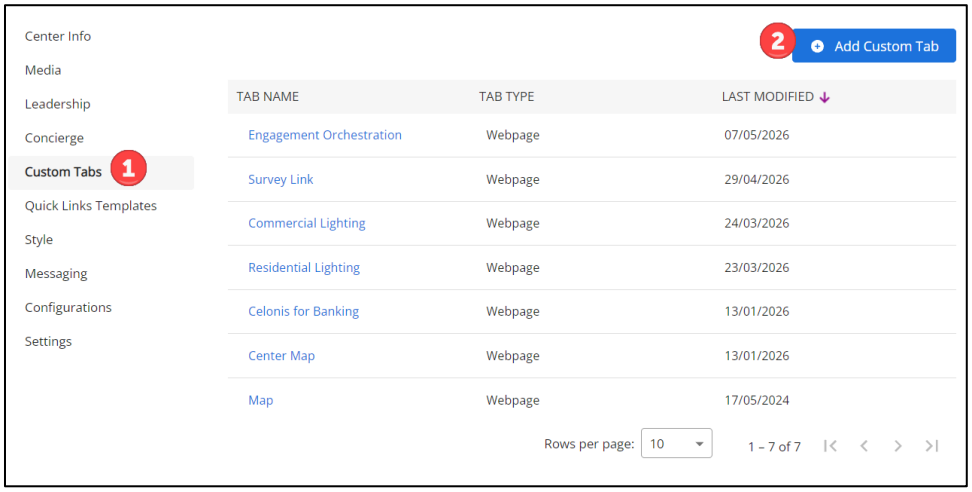

*Concierge in the portal: categories, a category's places and a place's details*

## Custom tabs

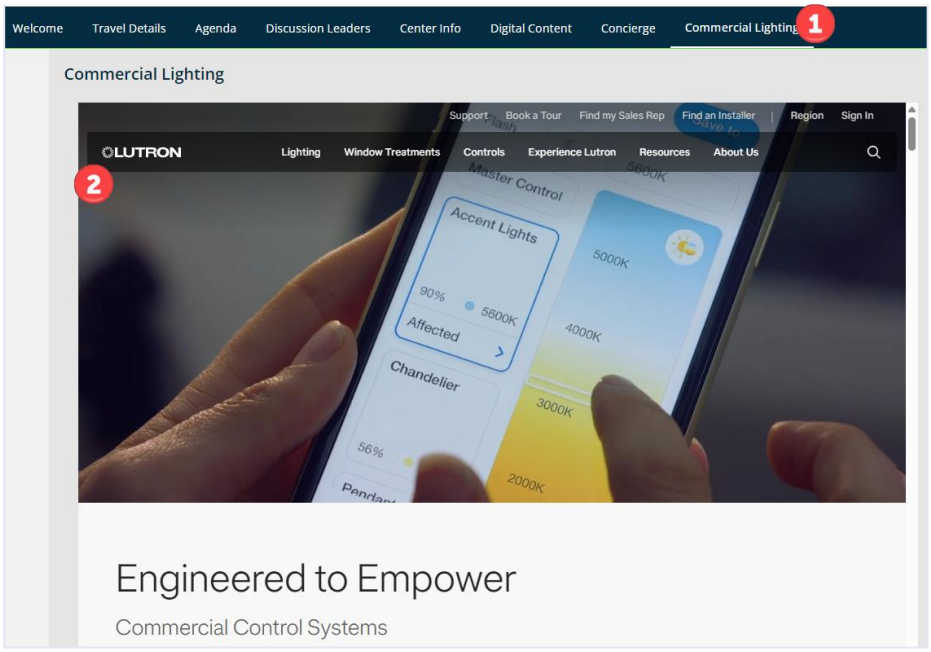
Custom tabs add your own pages to the portal.

- **URL tab:** opens a web page inside the portal, such as a demo or experience site. Set the tab name, page title and which centers show it.
- **Nested tab:** your own categories and pages, up to three levels deep, built the same way as Concierge.

1. Go to **Experience → Customer Portal → Custom Tab**.
2. Choose URL or nested, then add the name, title and content.
3. Set it as the default tab for every visit, or add it to a single visit.
4. Optional: point a quick link to it.




*Custom Tabs: (1) Custom Tabs, (2) Add Custom Tab*



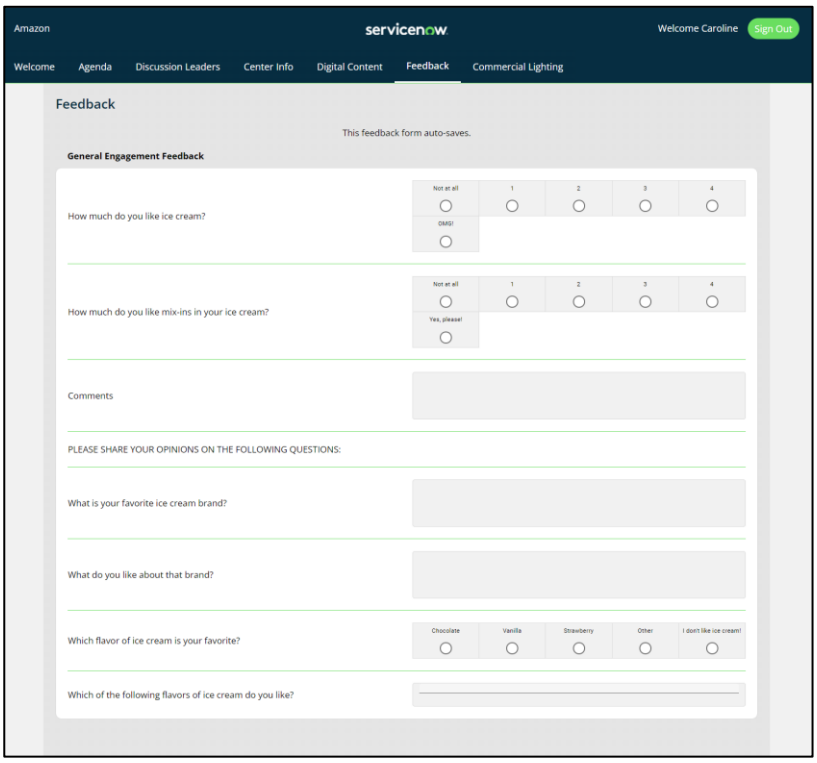

*A URL custom tab in the portal*

**RELATED FAQS**

[How do I add a custom tab in the CE App?]

## Feedback

Feedback surveys come from the visit's survey setup in the Engagement Hub, and attendees' answers are saved back to the visit for reporting. Feedback can be offered on the day, after the visit, or both, and attendees can rate each topic on the agenda.




*The feedback survey as attendees see it*

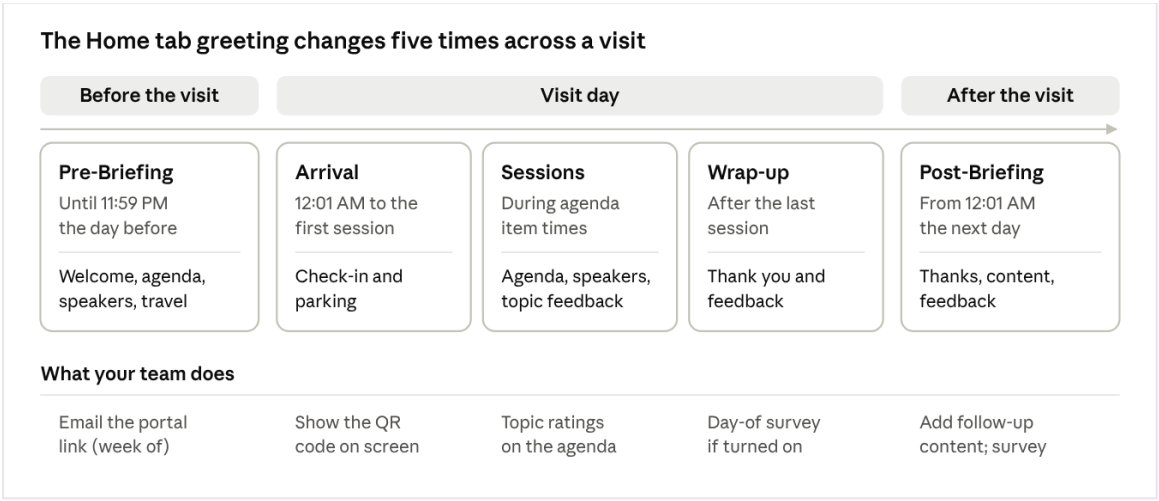
**RELATED FAQS**

[Which Briefing Source Evaluation Question Types Are Supported by My CE App?]

[Request Form – Visit Survey]

# How the portal changes across a visit

The portal follows the visit's schedule on its own: the Home tab greeting switches at each phase, so you set the five messages once and they appear at the right time.




*The five greeting phases across a visit*

Phases follow the visit's date and agenda times in the Engagement Hub, so a changed agenda moves the phases with it. Feedback can be set for day-of, post-visit or both.

# Ongoing management

A short routine keeps the portal accurate: check each visit before it goes out, review links and content every quarter, and refresh concierge twice a year. Start with the defaults and refine as you see how attendees use the portal.

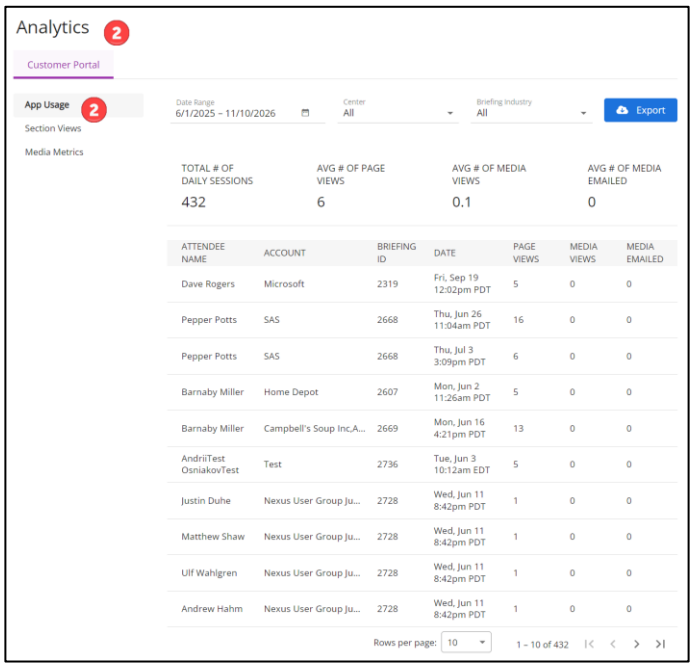
| When | Task | Where |
|---|---|---|
| Before each visit | Confirm the visit is **Confirmed** (portal links are created only for confirmed attendees), the agenda, speakers and itinerary are complete, and send the portal link | Visit in the Engagement Hub |
| Before each visit | Add any visit-only content (presentations, review documents) | Briefing Overview → Experiences |
| Day of the visit | Show the portal QR code on screen so attendees can open it on their phones | Your on-site screens |
| After each visit | Add follow-up content and check feedback came in | Briefing Overview → Experiences; Reports |
| Monthly | Review portal usage: visits, tab views, media engagement | Insight → Reports / Analytics |
| Quarterly | Open every quick link and media item; replace broken links and outdated content | Quick Links; Content → Media |
| Quarterly | Review greeting messages for each phase and engagement type | Messaging |
| Twice a year | Review concierge places: still open, still recommended, details correct | Concierge |
| When your brand or team changes | Update colors, logo, images, leadership and host settings | Style; Leadership; Settings |
| For special events | Swap in event greetings and hero image, then switch back afterwards | Messaging; Style |

How to share the portal with attendees:

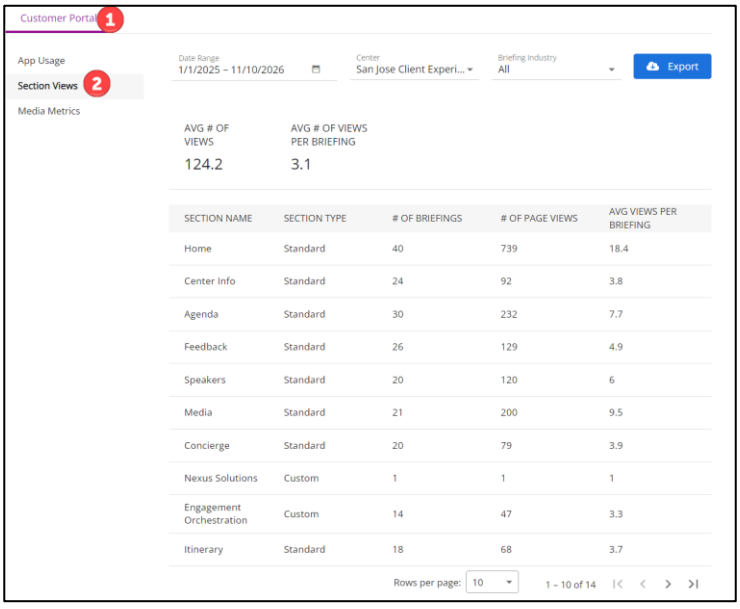
- **Week of the visit:** email the link, or have the account team send it.
- **Day of:** show a QR code on screen.
- Each attendee's link is personal and is shown on the visit record in the Hub.

## Analytics

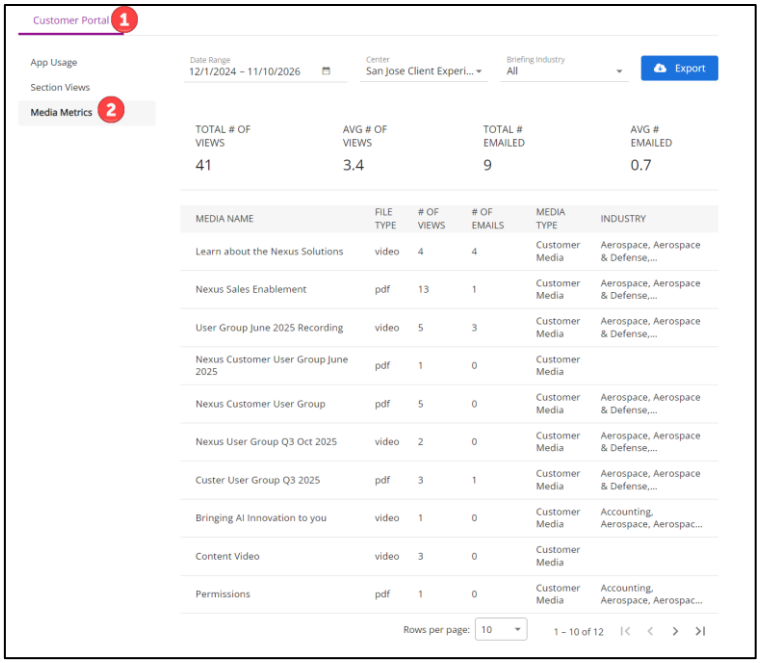
Analytics shows how attendees use the portal: how many sessions each briefing gets, which tabs they open and which media they view. Use it to spot content that needs updating and to see which visits were most engaging.




*App Usage: sessions and views for each briefing*




*Section Views: views for each tab*




*Media Metrics: views and emails for each media item*

**RELATED FAQS**

Analytics: How many sessions are occurring and what is the user reviewing?

Analytics: What tabs are my customers engaging with in the CE App?

Analytics: What media items are my attendees engaging with through the CE App?

Add/Edit External Attendee

# Troubleshooting and support

Most issues come down to the wrong center, a blank required field, or a page that needs refreshing.

| What you see | What to check |
|---|---|
| Save stays grey in Settings | A required field is blank; its label is red. Fill it in and save. |
| Style C sections aren't showing | **Customer Portal Layout** must be set to **Layout C** for this center. |
| A change doesn't show in the portal | Confirm you edited the right center, then refresh the portal (or clear the browser cache). |
| A tab is missing or in the wrong place | Check it is turned on and ordered in **Configurations**, then reload the portal. Extra tabs move into **More**. |
| No option to contact the Meeting Owner or Briefing Manager | Turn on **Show Meeting Owner** or **Show Briefing Manager** first; the contact option appears after. |
| Only the header and a menu icon appear | All tabs are turned off. Turn on the tabs you need. |
| Quick link fields look different | Check that the layout under the **Center** selector says **Layout C**; Link Icon is a Layout B field. |
| Show Itinerary is greyed out | Itinerary sync isn't enabled for your instance. Contact Nexus support. |
| Wrong date, time, room or speaker | These come from the visit in the Engagement Hub. Fix them on the visit. |
| An attendee has no portal link | The visit must be **Confirmed** and the person added as an attendee. |

**Contact Nexus support** at support@nexuscenter.io. Include your center name, the layout, the screen and setting involved, a screenshot, and the device (desktop, tablet or phone).

> **RELATED FAQS**
> Customer Portal Style C

# Quick reference

Design every image at exactly these sizes; text limits include spaces.

| Item | Size or limit | File types |
|---|---|---|
| Header Image | 2031 x 144 | PNG, JPG |
| Logo Image | 400 x 400 | PNG (transparent background) |
| Hero (Greeting Image) | 1366 x 444 | PNG, JPG |
| Greeting message image | 440 x 500, each carousel slide the same | PNG, JPG |
| Greeting message text | Under 450 characters | – |
| Quick link image | 960 x 540 | PNG, JPG |
| Quick link description | One line, under 90 characters | – |
| Media thumbnail | 960 x 540 | PNG, JPG |
| Media files | – | PNG, JPG, MP4, GIF, PDF |
| Center header / body | 250 / 1,000 characters | Image or video: PNG, JPG, MP4, GIF |
| Settings labels | Up to 255 characters; aim for 1–4 words | – |
| Custom nested tabs | Up to 3 levels of categories | – |
| Colors | HEX values, such as #062D41 | – |
| Opacity | 0 (clear) to 100 (solid) | – |

For every supported image and video format, see Supported Media Formats.

# Related FAQs

All Nexus Support Center articles referenced in this guide, by topic.

| Topic | Article |
|---|---|
| Style C, settings and quick links | Customer Portal Style C<br>Nexus Customer Portal Personalization and Maintenance |
| Branding and styles | What are the style settings for the Customer Engagement App (CE App)?<br>What are the best practices for logos? |
| Greeting messages | How do I add multiple default salutations?<br>How to add a Custom Salutation |
| Agenda and speakers | Customer Portal Agenda Configurations<br>Agenda Topics and Meals<br>Dynamic Speaker Profile & Management |
| Travel Details (Itinerary) | How to configure the Itinerary features<br>Add/Edit Itinerary Item |
| Center Info and Leadership | Center Info<br>Leadership |
| Digital Content | Customer Portal Media<br>How do I add customer-specific digital content or media to a briefing?<br>I want to add or edit the related media items<br>Supported Media Formats |
| Custom tabs | How do I add a custom tab in the CE App? |
| Feedback | Which Briefing Source Evaluation Question Types Are Supported by My CE App?<br>Request Form – Visit Survey |
| Attendees and analytics | Add/Edit External Attendee<br>Analytics: How many sessions are occurring and what is the user reviewing?<br>Analytics: What tabs are my customers engaging with in the CE App?<br>Analytics: What media items are my attendees engaging with through the CE App? |

Need more help? Email Nexus support at support@nexuscenter.io.