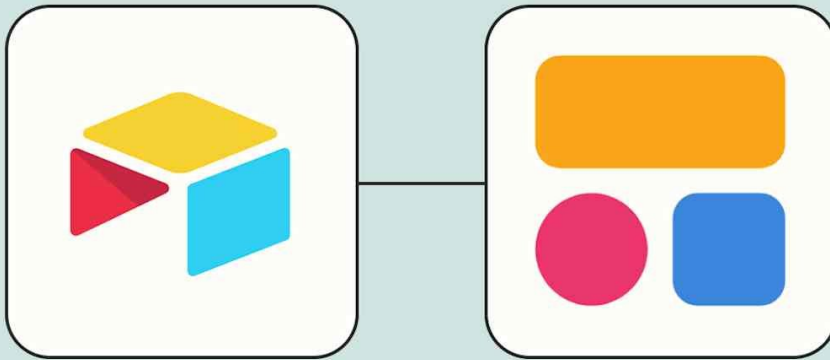


The Client Portal Playbook

A practical guide to building portals that don't collapse after launch.



THE REAL PROBLEM

Everyone can build a portal in a weekend.

Most abandon it within 2 months.
The screen is easy. The system behind it is where everyone gives up.

PORTAL 20%

DATA + AUTOMATIONS + PERMISSIONS = 80%

The 3 Layers

Nobody builds these. That's why portals die after 2 months.

01 DATA MODEL

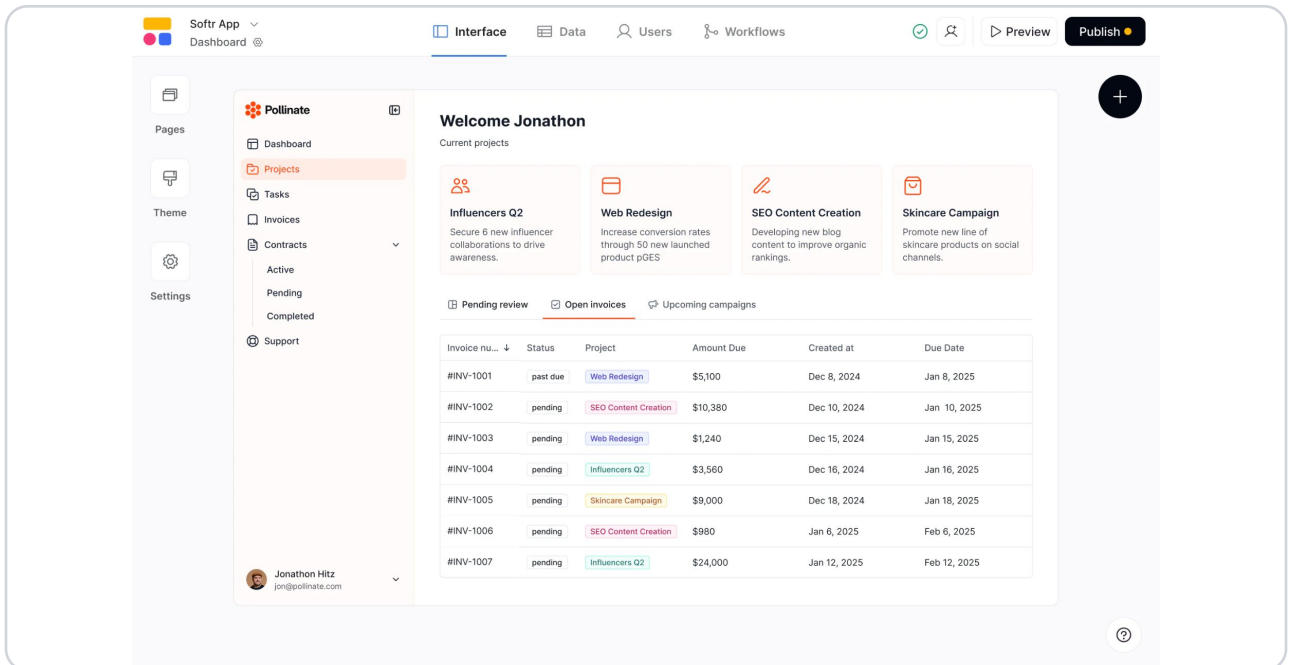
- ✓ Stop using one flat table with 40 columns.
- ✓ Split: Clients, Projects, Deliverables, Invoices.
- ✓ Softr cares about clean relationships, not table count.

02 AUTOMATION LAYER

- ✓ The portal is just a door. What happens after?
- ✓ Feedback in > PM pinged > task created > client confirmed.
- ✓ No automation = a google form with a login page.

03 PERMISSIONS MATRIX

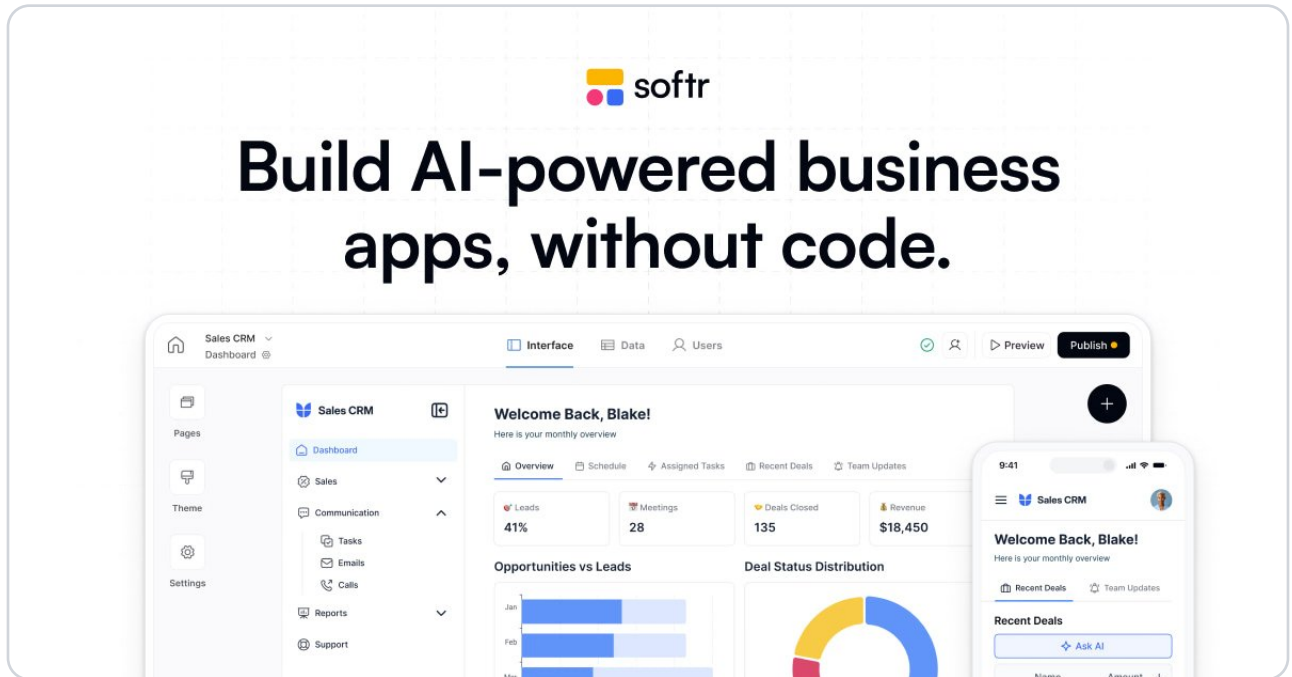
- ✓ Default Softr: show where email = user. Basic.
- ✓ Real portals: role matrix in Airtable, Softr reads it.
- ✓ One base powering four different portal experiences.



A real client portal on Softr. Clean UI, live Airtable data underneath.

Where We Step In

Anyone can drag blocks in Softr. Here's what they can't do.



Softr makes the frontend easy. The hard part is everything behind it.

WHAT ANYONE CAN DO

The easy part.

- Drag and drop a Softr page
- Connect an Airtable base
- Add a login screen
- Show a list of records
- Add a form
- Pick a template
- Change colors and fonts

Takes a weekend. YouTube teaches this.

WHAT ACTUALLY MATTERS

The hard part.

- ✓ Data model that scales past 200 records
- ✓ Linked tables with junction records
- ✓ Automation layer (n8n/Make)
- ✓ Multi role permission architecture
- ✓ Error handling when things break
- ✓ API rate limit workarounds
- ✓ Migration planning for later

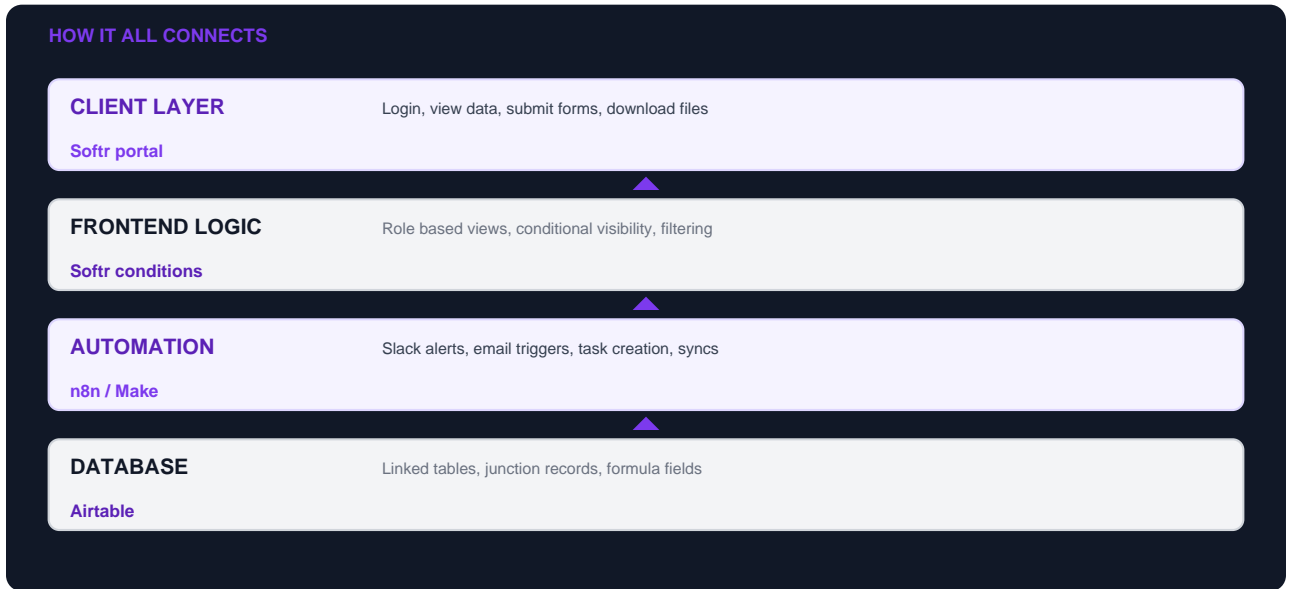
Takes experience. No tutorial covers this.

THE REAL JOB

We don't build the screen. We build the system that feeds the screen and keeps it alive.

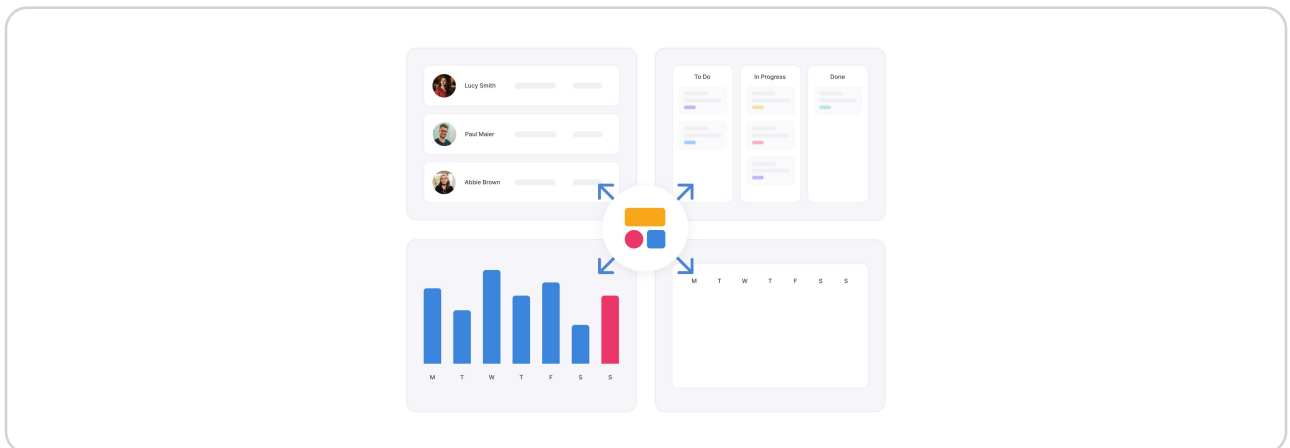
System Architecture

How the layers connect. This is the blueprint we follow every time.



The Stack What each layer runs on.

LAYER	TOOL	WHAT IT DOES
Database	Airtable	Backend, source of truth
Portal UI	Softr	Client facing interface
Automation	n8n / Make	Workflow triggers, syncs
Notifications	Slack + Email	Alerts, confirmations
Auth + Roles	Softr built in	Login, role based access



Softr components: lists, charts, kanban, calendars. All powered by Airtable.

BEST USE CASES

Where this stack wins.

- ✓ **Agency client portal**
Projects, feedback, files
- ✓ **Student / course portal**
Progress, submissions
- ✓ **Vendor management**
Onboarding, docs, compliance
- ✓ **Service business tracker**
Jobs, invoices, approvals
- ✓ **Internal ops dashboard**
Tasks, KPIs, reporting

HONEST LIMITATIONS

- ✗ **10K+ records**
Pages get sluggish
- ✗ **Complex conditions**
5+ nested filters = pain
- ✗ **File management**
No versioning or folders
- ✗ **Custom styling**
Limited to Softr components
- ✗ **Vendor lock in**
Postgres migration hurts
- ✗ **API rate limits**
Airtable caps at 5/sec

DECISION FRAMEWORK

Stay with Airtable + Softr:

- ✓ Under 50K records
- ✓ Basic to medium permissions
- ✓ Team maintains it themselves
- ✓ Need it live in weeks, not months

Go custom (Retool/Bubble):

- ✗ 50K+ records or scaling fast
- ✗ Complex conditional logic
- ✗ Pixel perfect design needed
- ✗ Building a product, not a tool

THE BUILD TIMELINE

4 weeks. Done properly.

- Week 1** **Discovery + data architecture**
Process mapping, table design, relationships
- Week 2** **Portal UI + auth + roles**
Pages, login, conditional views, forms
- Week 3** **Automations + integrations**
n8n/Make workflows, Slack, email triggers
- Week 4** **Testing + hardening + handoff**
Edge cases, permissions QA, team training

Quick recap:

The portal is 20% of the work.
Data model, automations, and permissions
are the other 80%.

If nobody built those three layers,
your portal is a fancy spreadsheet
with a login page.

Need a portal that actually works?

WHAT WE DO

We build client portals, internal tools,
and automation systems for businesses
doing \$500K to \$5M.

We tell you which stack fits before
we touch anything. 50+ production builds.

[Comment PORTAL to get started](#)

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