

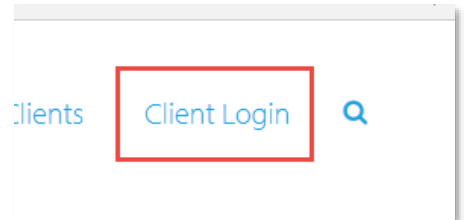
Client Portal

Quick Reference Guide

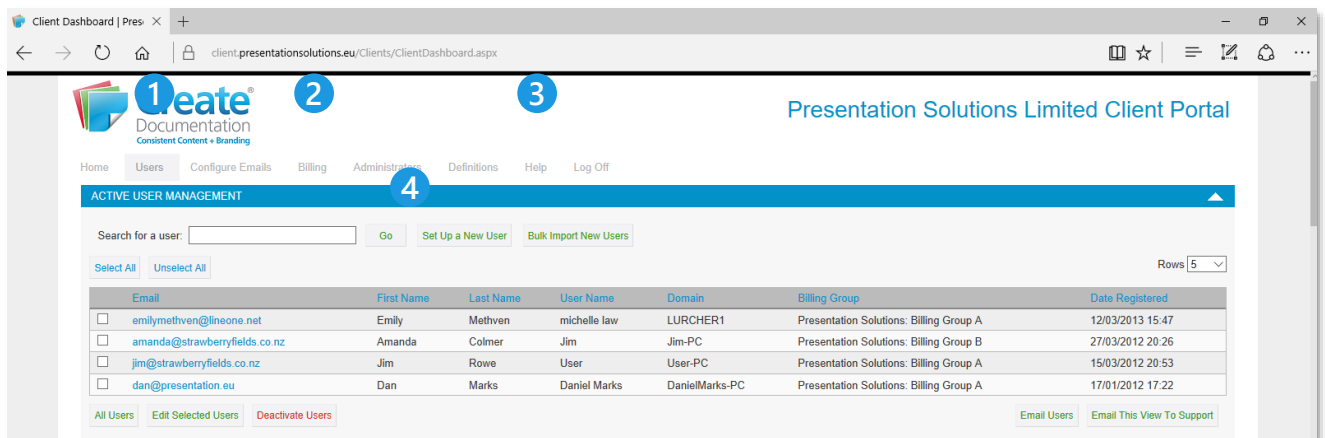
1. Logging in

Go to <http://client.presentationssolutions.co.uk>

Or, you can click the link on our website. Your username and password should have already been provided to you. If you don't have one, contact our Support Helpdesk.



2. Getting around the homepage

A screenshot of the Presentation Solutions Limited Client Portal homepage. The page features a navigation menu with tabs for Home, Users, Configure Emails, Billing, Administration, Definitions, Help, and Log Off. A blue banner at the top reads 'ACTIVE USER MANAGEMENT'. Below this is a search bar with the text 'Search for a user:' and buttons for 'Go', 'Set Up a New User', and 'Bulk Import New Users'. A table lists users with columns for Email, First Name, Last Name, User Name, Domain, Billing Group, and Date Registered. The table contains four rows of user data. At the bottom of the table are buttons for 'All Users', 'Edit Selected Users', and 'Deactivate Users'. On the right side of the table are buttons for 'Email Users' and 'Email This View To Support'.

1 Users tab

View a complete list of your current users, and make changes such as adding or removing users.

2 Billing tab

View your billing history, including prepaid vs active users and a record of which users were active in each month. You can also edit your billing address.

3 Help menu

A comprehensive Help Guide including definitions of terms and screenshots of each page.

4 Search for a user, or add a new user

Search the user list by name or email address. Add a new user or bulk import a group of users simultaneously.

3. Adding a new user

- Click **Set Up A New User** from the Dashboard or Users page
- Enter their Name, Email, Cost Centre code (if required by your company) and choose a Billing Group and Brand permission.
- Save the user and send them a **New User Email**

Set Up a New User

Send New User Email

4. Deactivating a user

- Find the user account:
 - Search for their name or email from the home page
 - Find them on the **Users** tab
- Click **Deactivate User**

Search for a user:

Deactivate User

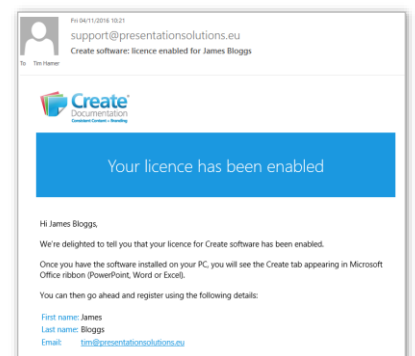
5. View your billing information

- Select the **Billing** tab from the navigation bar, and select your **Billing Group**, if your organisation has more than one
- This will show a table of your prepaid and active users. The difference be calculated in an annual reconciliation, resulting in a credit or top-up invoice at the end of the year

	Jun	Jul	Aug
Prepaid licences	200	200	200
Active users	220	220	220
Difference +/-	20	20	20

6. Edit automatic email settings

- The Client Portal sends three types of automatic emails to users:
 1. New User Email
 2. Unregistered User Reminder Email
 3. Failed Registration Email
- You can edit the contents of these emails from the **Configure Emails** tab. This should include training information and who to contact for approval of a Create licence.



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