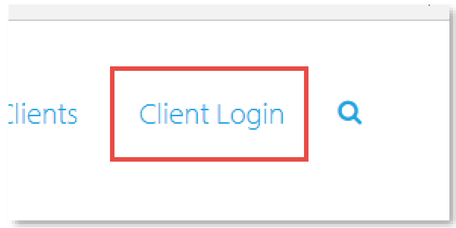
Client Portal

Quick Reference Guide

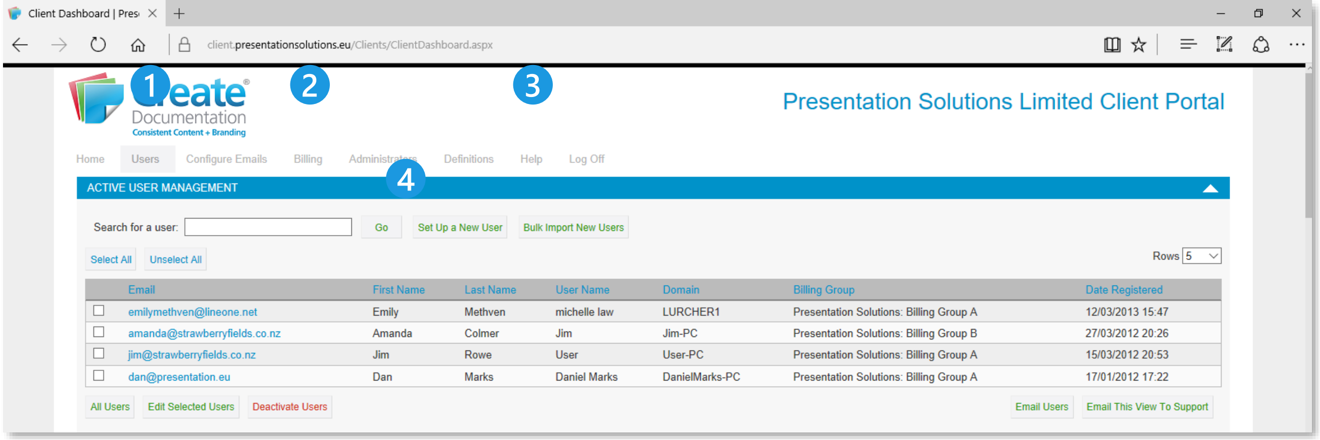
1. Logging in

Go to http://client.presentationsolutions.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



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.

Presentation® Solutions

UK +44 333 939 0100
US +1 312 283 8505
support@presentationsolutions.co.uk

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: James Go

Deactivate User

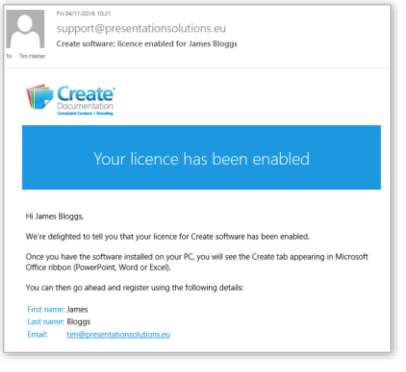
5. View your billing information

- 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.



Contact us

United Kingdom
Chapter House
33 London Road
Reigate
Surrey RH2 9HZ

T +44 333 939 0100

support@presentationsolutions.co.uk

United States
155 North Wacker Drive
Suite 4250
Chicago IL 60606

T +1 312 283 8505

www.presentationsolutions.co.uk

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