

Client Portal

Quick Reference Guide

Client Portal

1. Logging in

Go to <https://presentationsolutions.co.uk/client-login/> and click **Client Portal**.

On the Sign in page insert your email address and click **Next**. This will then take you to the Enter password page. Click **Forgot password?** This will prompt an account verification code to be sent to your email address. On the Enter code page type in the verification code and click **Next**. This will take you to the Update your password page. Add your password and click **Reset password**. You will then have the option to save your password and to stay signed in.

2. Getting around the homepage

1 Default tab

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

2 Help menu

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

3 Search for a user, or add a new user

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

4 Filter users


Click the funnel to view Active/Inactive users, Trial users, and Company Roles.

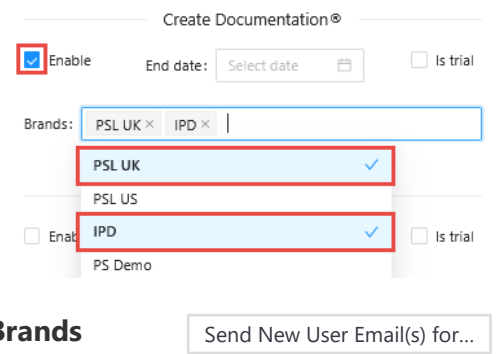
5 Billing dropdown

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

The screenshot shows the Client Portal interface for Presentation Solutions Limited. It features a navigation menu with 'Home', 'Advanced User Management', and 'Configure Emails'. The main content area is titled 'Active User Management' and includes a table of users with columns for Email, Name, Active status, Trial status, Roles, and Username. A search bar is located above the table. Below the table, there are several expandable sections: 'Installation links', 'Recent failed authentications', 'Billing - all records for information purposes only and cannot be edited', 'Licence Approval Process', 'IT Rollout and Update Process', and 'Distribution and Packaging Notes'. Red arrows and numbered callouts (1-5) point to specific elements: 1 points to the 'Home' link, 2 points to the 'Help' link, 3 points to the search bar, 4 points to the filter dropdown menu, and 5 points to the 'Billing' section.

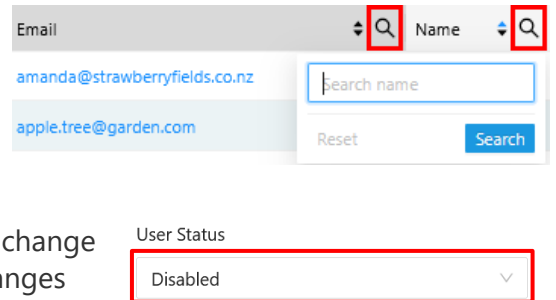
3. Adding a new user

- Click **New User** from the **Default** tab 
- Enter their Name, Email, choose a Billing Group, Cost Centre code (if required by your company), choose **Enabled** from the **User Status** dropdown and select the relevant **User Type(s)**. Check **Enable** and add required **Brands**
- Save changes. Select the user from the list and send the relevant **New User Email(s)**



4. Deactivating a user

- Find the user account by searching for their first or last name or email address from the **Default** tab on the home page
- Click on the user to open the User Information and change **User Status** from **Enabled** to **Disabled** and Save Changes



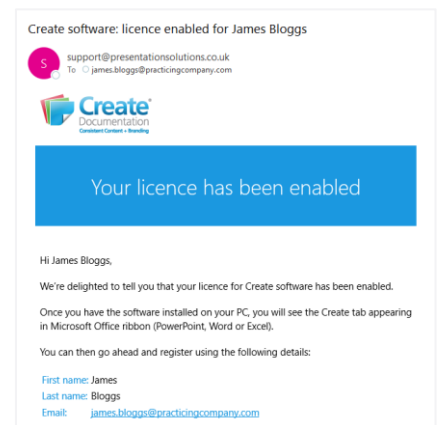
5. View your billing information

- From the **Default** tab on the home page, scroll down to the **Billing** dropdown and select the **All Billing Groups – By Billing Groups** dropdown and select the Brand or Billing Group. Click on the double ended arrow to view in detail
- This will show a table of your prepaid and active users. The difference will be calculated in an annual reconciliation, resulting in a credit or top-up invoice at the end of the year

Brand Name	M	A	M
Billing Report			
Active Users	2	2	5
Total PrePaid for Period	2	7	7
Total +/-	0	-5	-2

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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