# Client Portal

## Quick Reference Guide

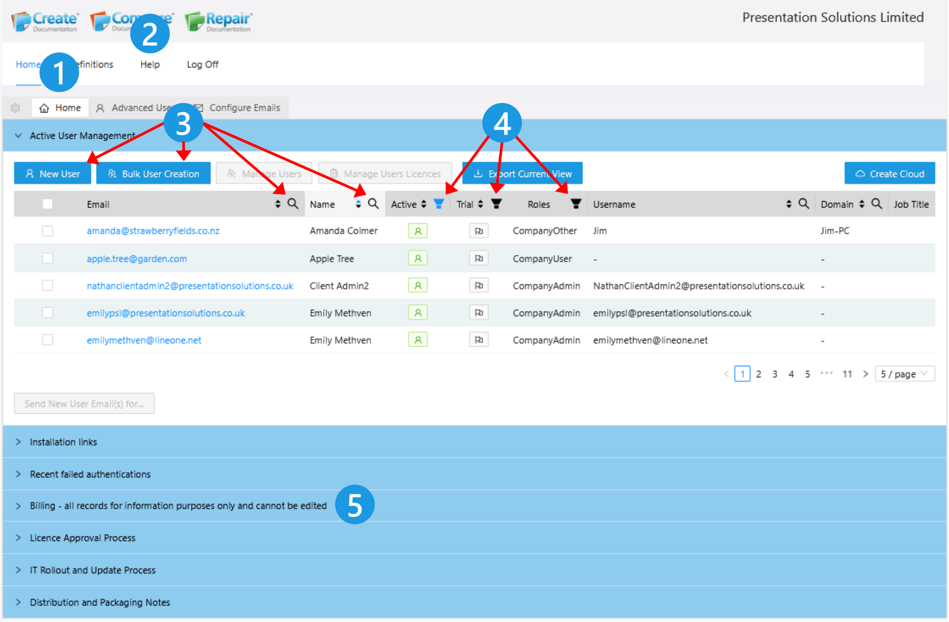
## 1. Logging in

Client Portal

Go to [https://presentationsolutions.co.uk/client-login/](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.

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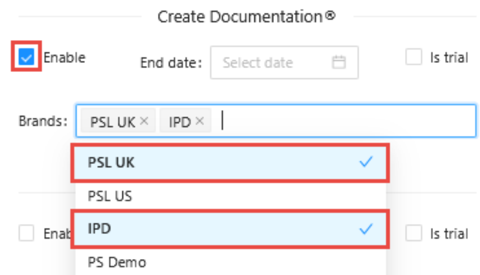
# 3. Adding a new user

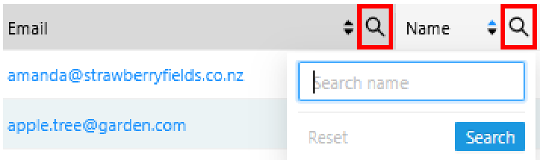



- Click **New User** from the ***Default*** tab


- 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

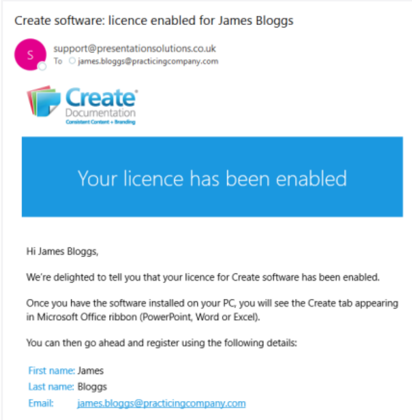

# 5. View your billing information

- 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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