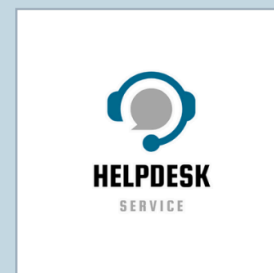


QUICK START GUIDES

CALIPRO.CO.UK



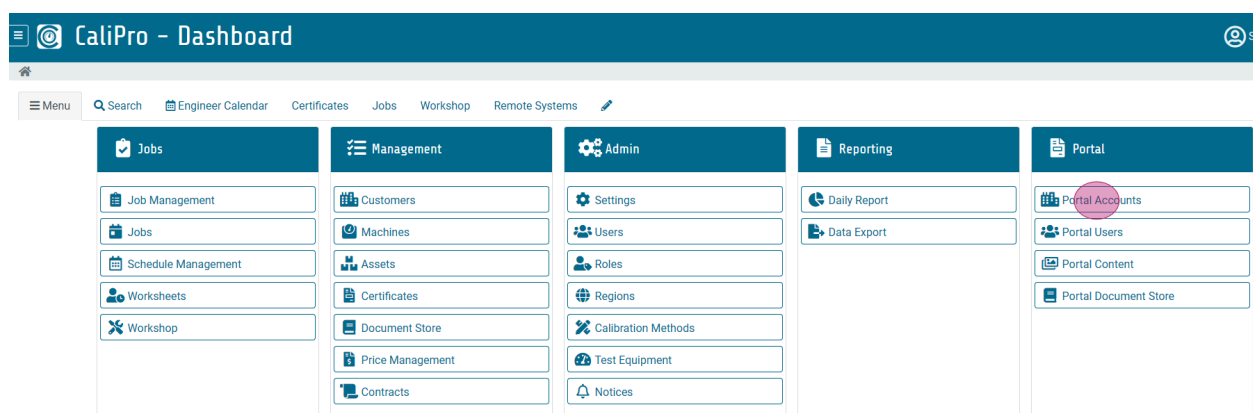
Portal Accounts

The 'Portal' is where your customer accesses their certificates, assets & job history.

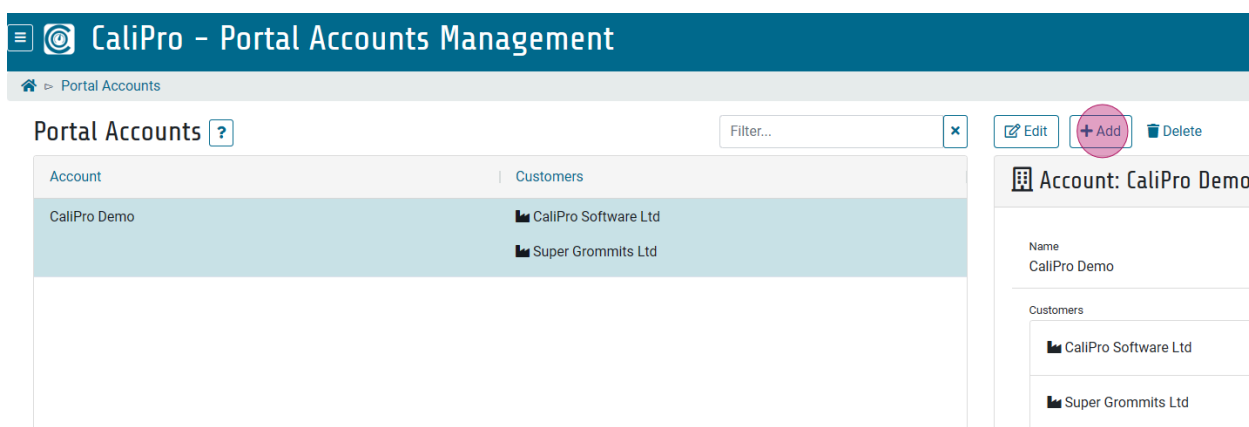
'Accounts' enable users to access multiple customers from the same login.

This guide shows you how to set up an account within the portal.

1. On the main dashboard, click "Portal Accounts"



2. To add an account, click "+Add"



3. Enter the name account. Then add the customers, by starting to type and a list of available customers will appear.


Add Account

×

Name

Nile Partners Ltd

Customers

 Buzzpens Limited

ⓘ In Use

Grimsby Chemical UK

+

Enter a customer name

Cancel

✓ Update

TIP! Take care when selecting which customers you wish to add to the portal account.
If you add the wrong customer you will be giving the portal users access to this customer's certificates, which may result in a GDPR breach.

For further support please email support@calipro.co.uk or call the helpdesk.

