



## **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"

🗉 🎯 CaliPro - Dashboard					
≡Menu	<b>Q</b> Search 🗎 Engineer Calendar Ce	ertificates Jobs Workshop Rem	iote Systems 🖉		
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		* Contracts	↓ Notices		

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
Gtimsby 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 <u>support@calipro.co.uk</u> or call the helpdesk.

