



## **Portal User**

The 'Portal' is where your customer accesses their certificates, assets & job history. This guide shows you how to add your customer as a 'User', and generate a login for them.

1. On the main dashboard, click "User"

🗉 🎯 CaliPro - Dashboard						
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■Menu	🔍 Search 🗎 Engineer Calendar Certificates Jobs Workshop Remote Systems 🖋					
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2. To add an account, click "+Add"



 Enter the users' details, including the email address they will use to sign in. You have the option to make them an Account Admin. Assign the new user to an 'Account'. Click in the Account search field and start typing the customer's name.

Add User Account	×					
Forenames						
Dawn						
Surname						
Manning						
Email						
dawn.manning@calipro.co.uk						
Account Admin						
Existing Account	Create New Account					
New Account						
Nakatomi Products Ltd						
Select a customer for this new account. Only customers not already assigned to accounts are shown.						
🖽 Account: Nakatomi Products Ltd						
🖌 Nakatomi Products Ltd						
CAUTION Setting the wrong account may give access to another customer's certificates.						
	Cancel + Add User					

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.

4. Click on "+Add User" to save the record.

5. Alterations can be made by clicking the Edit User button and saving the changes by clicking on Update User.

For further support please email <u>support@calipro.co.uk</u> or call the helpdesk.

