

QUICK START GUIDES

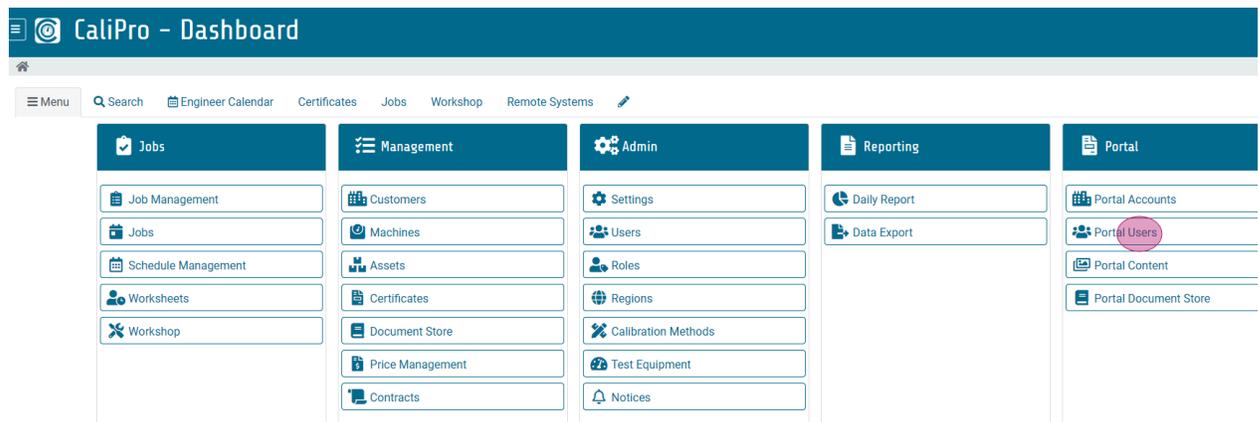
CALIPRO.CO.UK



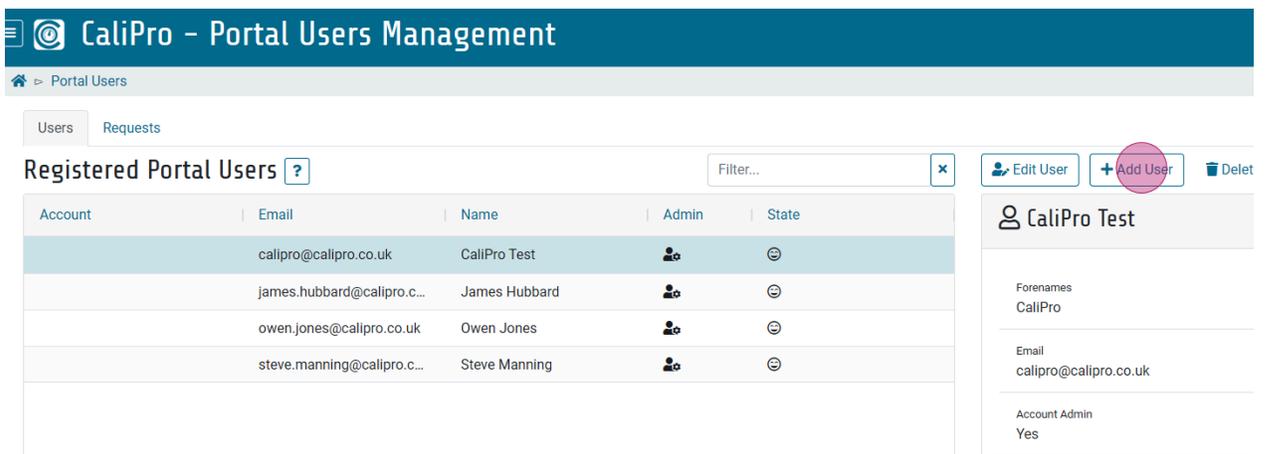
Portal User

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"



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



3. 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

Surname

Email

Account Admin

New Account

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.

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.

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

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

