Consultant Admin Account

STEP 1 – General Account Settings

Account Settings

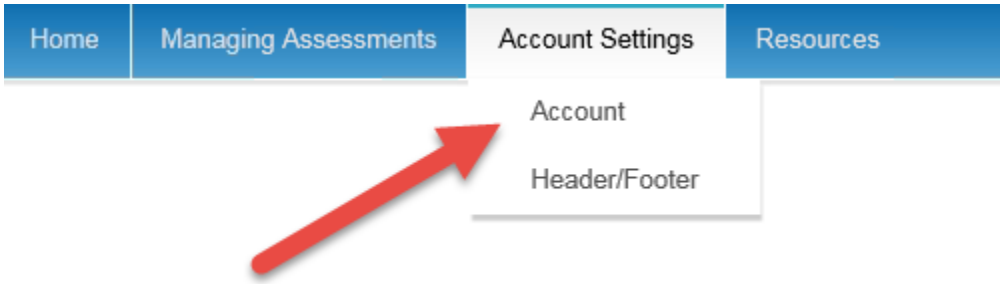
Account

This page consists of several options:

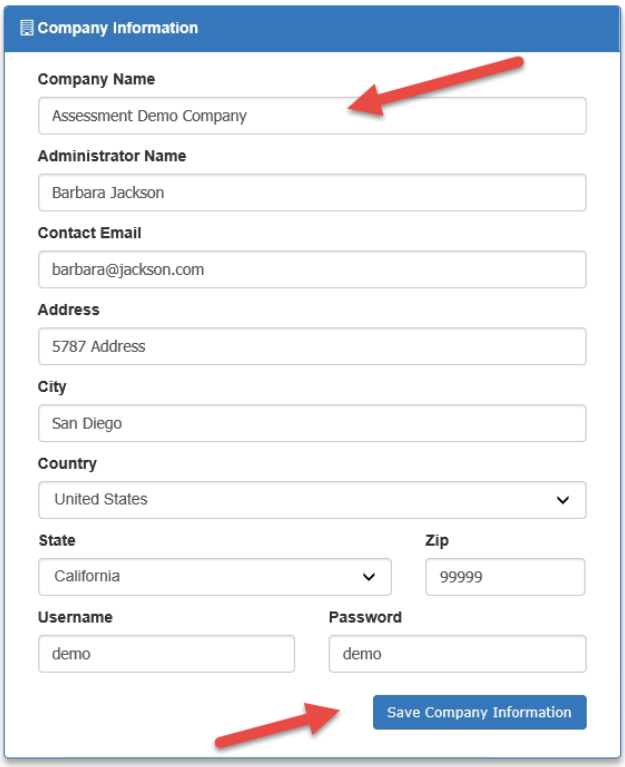
- Your **personal account information**
- Your credit card information for **assessment purchases** or **billable monthly usage**
- You can **upload a logo** for the cover page of reports

EDIT YOUR ACCOUNT INFORMATION

From the Account Settings tab, click on **Account**.



On this page, make any desired changes in the "Company Information" box and then click "**Save Company Information**". **IMPORTANT – Your company name**, **phone number** and **website** will appear in the footers of all PDF reports. Please make sure this information is correct.



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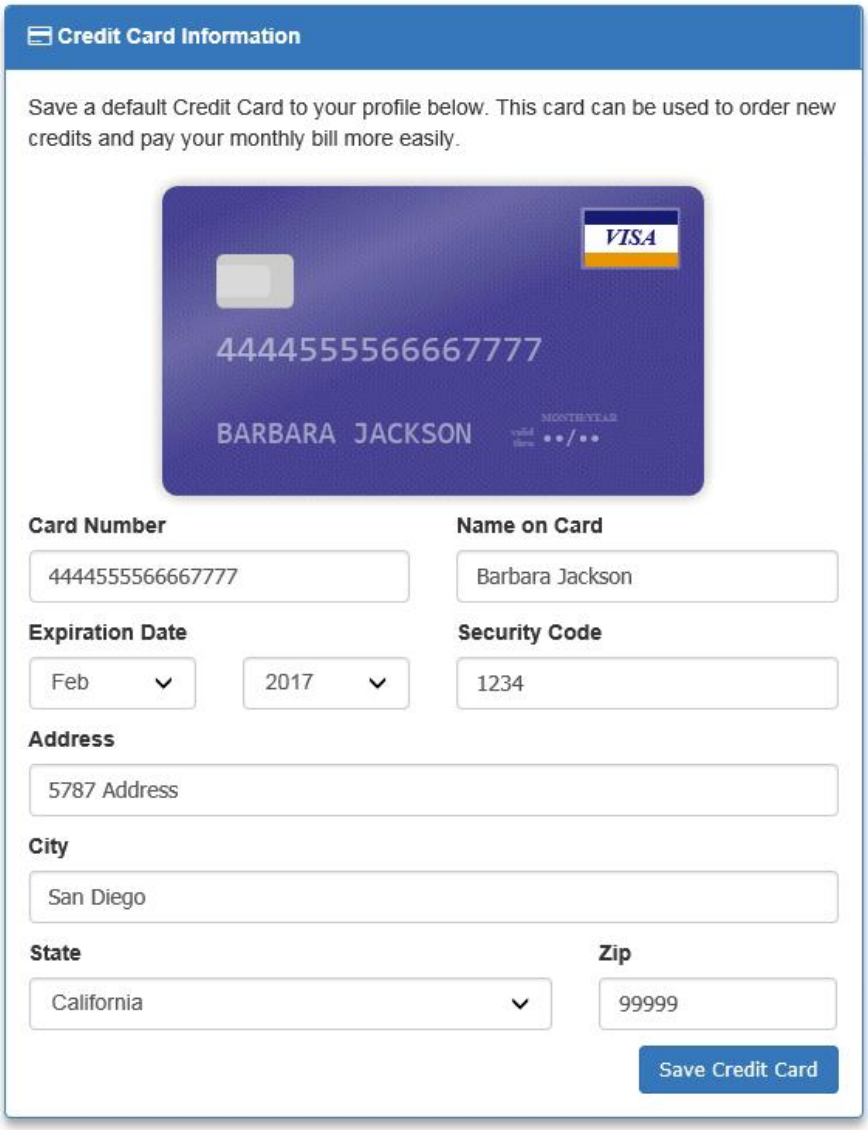
Credit Card Information

If you would like your credit card information saved in our system and available when making assessment purchases, update all the fields and click "**Save Credit Card**".

If you are a "**billable monthly client**" you will be required to keep this information up to date in order to use the assessments each month. If your card information is not current or valid, the system will not allow you to send out links or invite new people to complete assessments. Your credit card will be billed each month for usage the previous month.

If you are not a "billable monthly client", you will purchase assessments as needed. It is also not required to save your credit card information. It can manually be entered at the time of each purchase. **By saving the information your ordering process will be slightly quicker.**



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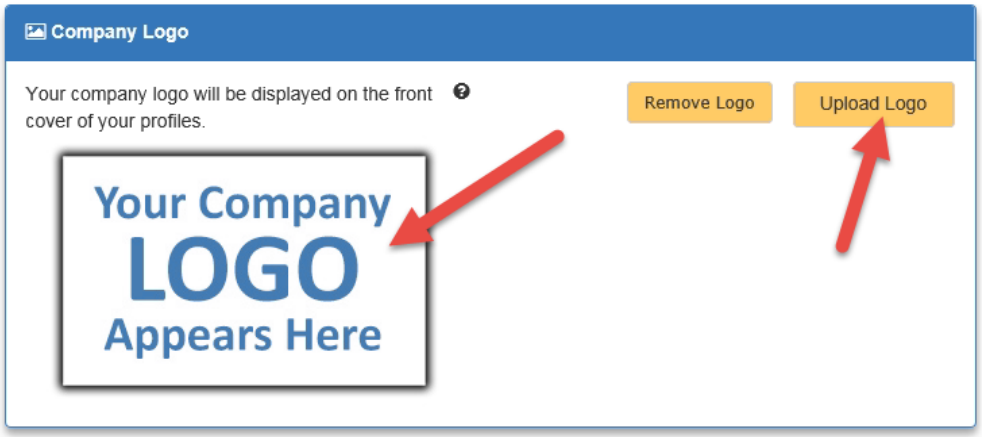
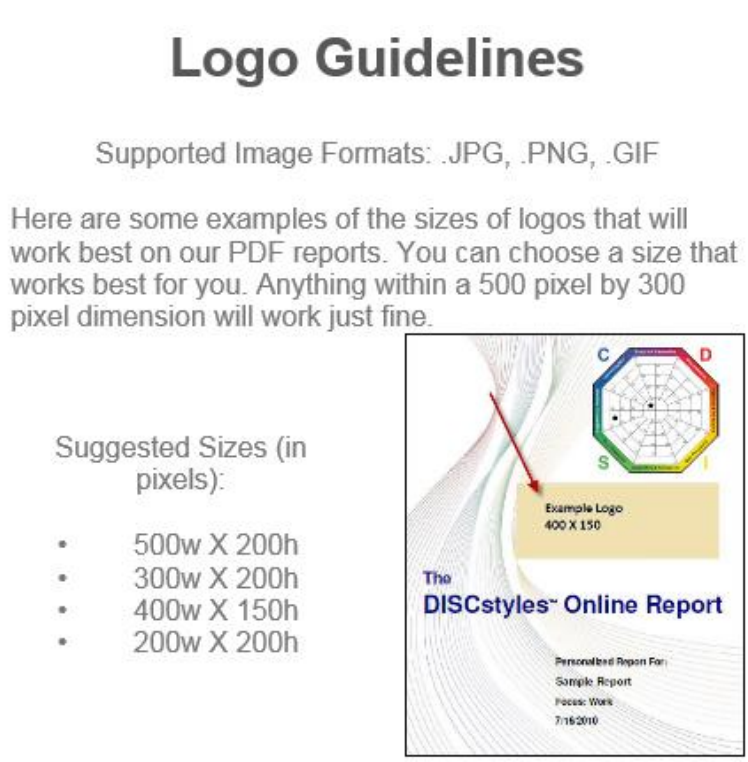
UPLOAD A LOGO

You can upload your company logo, or your client's logo, to be used on the cover pages of PDF reports. To do this, click on the "**Upload Logo**" button. Once this page loads, browse your computer to find the logo. A preview will appear on the screen.

To remove the logo, click on the "**Remove Logo"** button. You can also load up another logo which will overwrite the previous one. You can load .jpg, .png or .gif files. Please preview the logo. If the logo is excessive in size it will result in design distortion of the cover page of the report. You can upload a logo and then test the report output by regenerating a report for any assessment user. If you notice a modification to the logo is needed, you can upload a new one. Continue testing until you are satisfied with how your logo appears in the report.





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