



# **Consultant Admin Account**

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## **STEP 1 – General Account Settings**

# Account Settings

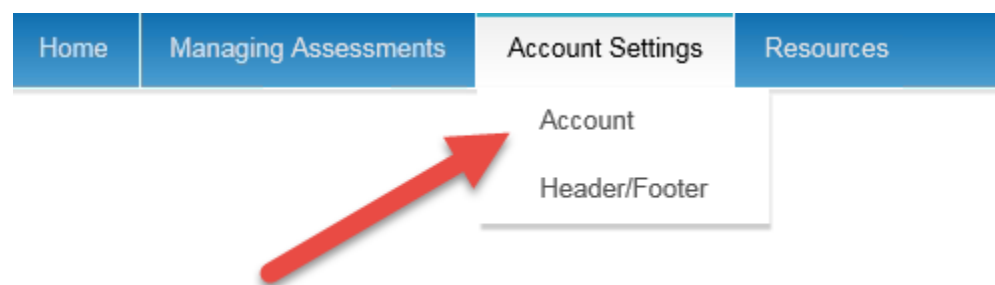
## Account

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.

A screenshot of the 'Company Information' form. The form has a blue header with the title 'Company Information'. Below the header, there are several input fields: 'Company Name' (containing 'Assessment Demo Company'), 'Administrator Name' (containing 'Barbara Jackson'), 'Contact Email' (containing 'barbara@jackson.com'), 'Address' (containing '5787 Address'), 'City' (containing 'San Diego'), 'Country' (a dropdown menu showing 'United States'), 'State' (a dropdown menu showing 'California'), 'Zip' (containing '99999'), 'Username' (containing 'demo'), and 'Password' (containing 'demo'). At the bottom right of the form is a blue button labeled 'Save Company Information'. Two red arrows are present: one points to the 'Company Name' input field, and the other points to the 'Save Company Information' button.

### 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.**

Credit Card Information

Save a default Credit Card to your profile below. This card can be used to order new credits and pay your monthly bill more easily.



Card Number

4444555566667777

Name on Card

Barbara Jackson

Expiration Date

Feb 2017

Security Code

1234

Address

5787 Address

City

San Diego

State

California

Zip

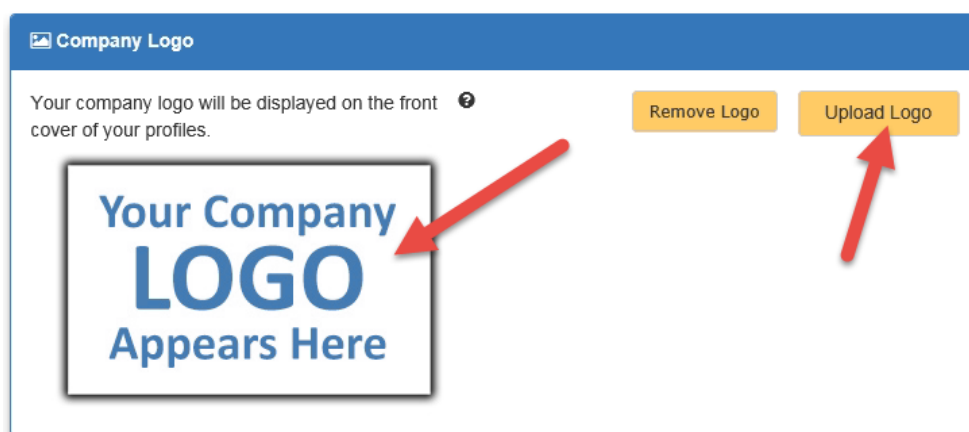
99999

Save Credit Card

## 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.



## Logo Guidelines

Supported Image Formats: .JPG, .PNG, .GIF

Here are some examples of the sizes of logos that will work best on our PDF reports. You can choose a size that works best for you. Anything within a 500 pixel by 300 pixel dimension will work just fine.

Suggested Sizes (in pixels):

- 500w X 200h
- 300w X 200h
- 400w X 150h
- 200w X 200h

