



# **Consultant Admin Account**

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**STEP 1 – General Account Settings**

# Account Settings

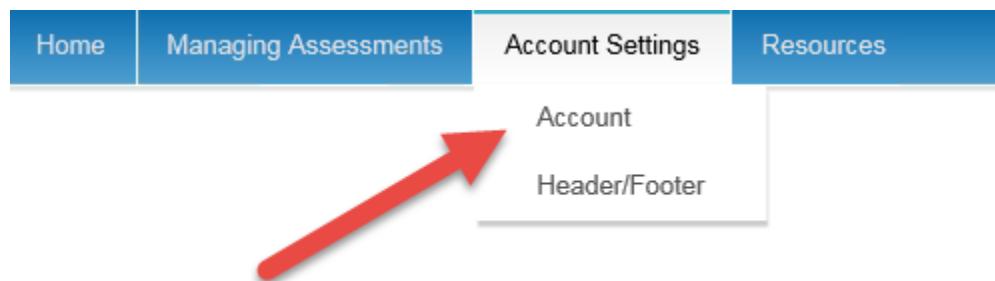
## Account

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.

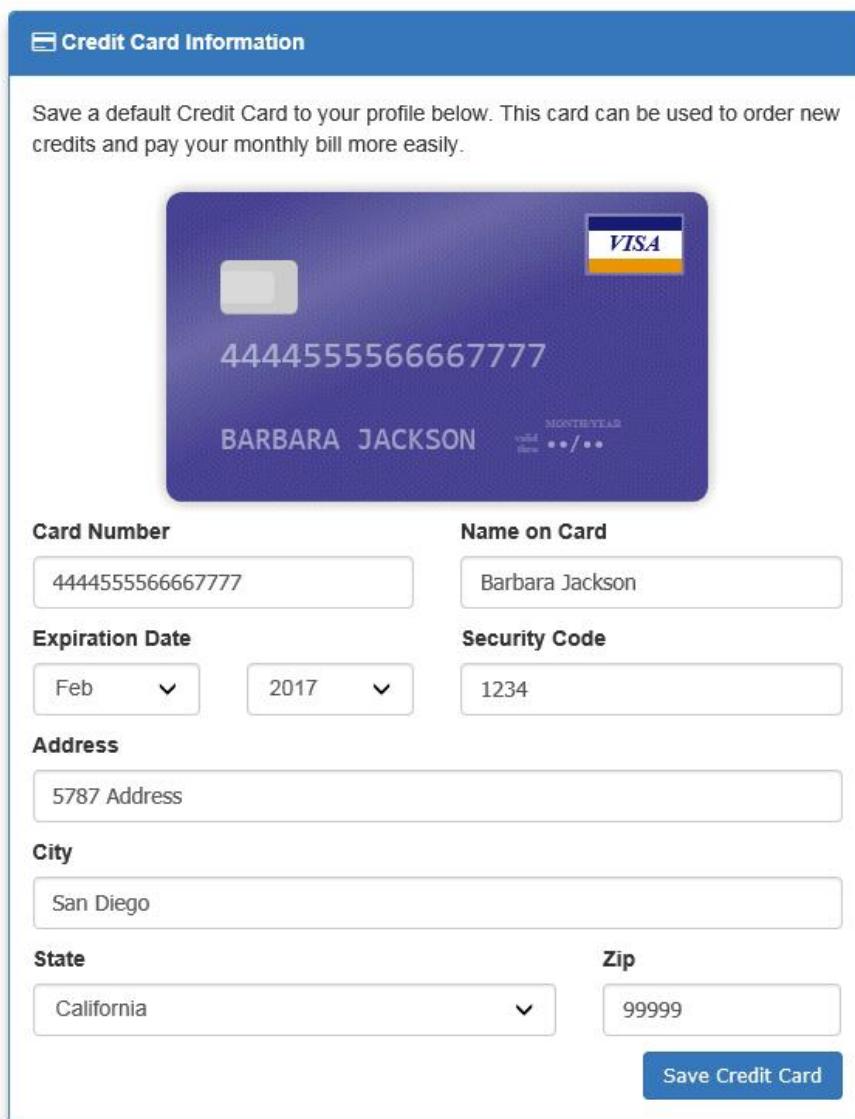
A screenshot of a 'Company Information' edit form. The form contains fields for Company Name, Administrator Name, Contact Email, Address, City, Country, State, Zip, Username, and Password. The 'Company Name' field contains 'Assessment Demo Company'. The 'Username' field contains 'demo' and the 'Password' field also contains 'demo'. A red arrow points to the 'Company Name' field. Another red arrow points to the 'Save Company Information' button at the bottom right of the form.

### 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.**

A screenshot of a web-based credit card form titled "Credit Card Information". The form includes a placeholder image of a VISA card with the number 4444555566667777, the name BARBARA JACKSON, and a expiration date of Feb 2017. Below the image are input fields for "Card Number" (4444555566667777), "Name on Card" (Barbara Jackson), "Expiration Date" (Feb 2017 dropdowns), "Security Code" (1234), "Address" (5787 Address), "City" (San Diego), "State" (California dropdown), "Zip" (99999), and a "Save Credit Card" button.

**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.

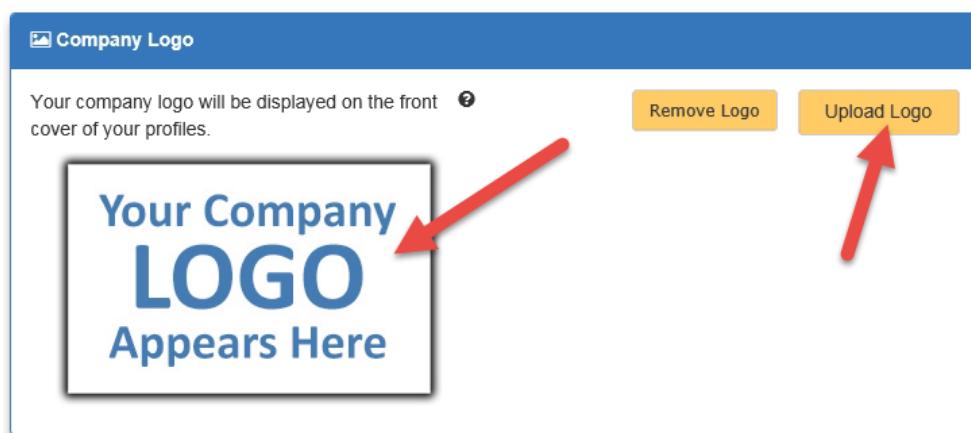


**Card Number**   
**Name on Card**   
**Expiration Date**    
**Security Code**   
**Address**   
**City**   
**State**  **Zip**   
**Save Credit Card**

### 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

