



ADMIN USER GUIDE

Welcome to the Privilege People Hub 365 Admin Portal

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PPH Portal Login for Administrators

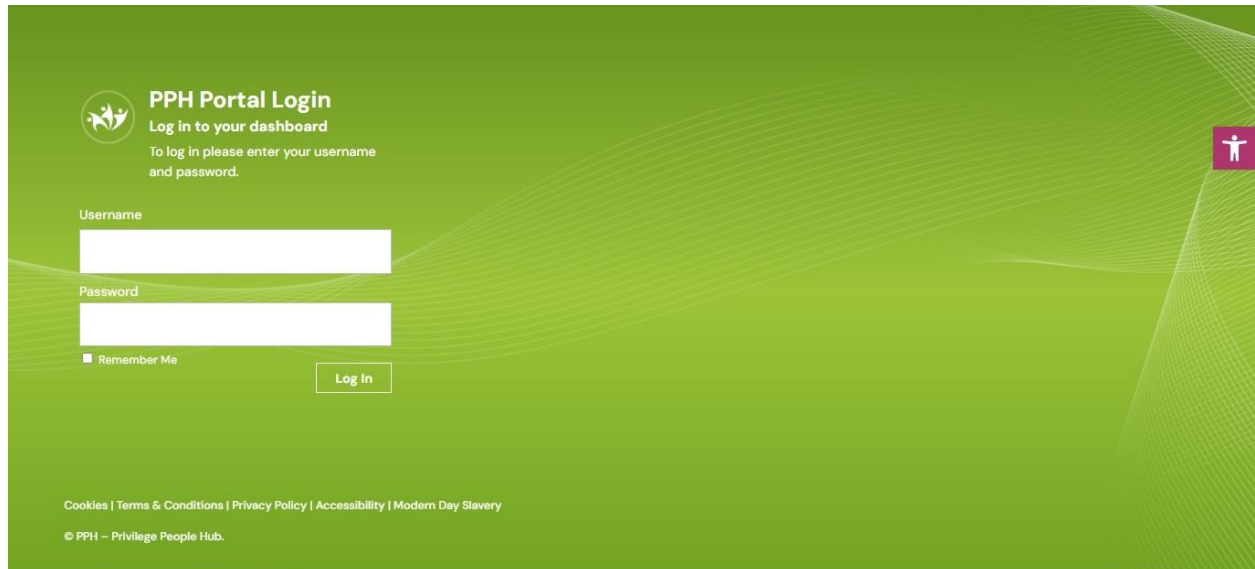


Image: 01. Admin_Login.jpg

As an Admin User please use the “Portal Login” link on the top line of the landing page or use this direct link below:- <https://login.pph365.co.uk/log-in> and log in using your username, password and press the “**Log In**” button.

If you lose or forget your password please click on “**Lost your password**” so that it may be reset. See [Client Account Management](#) on page 14 for further details.

ADMIN DASHBOARD

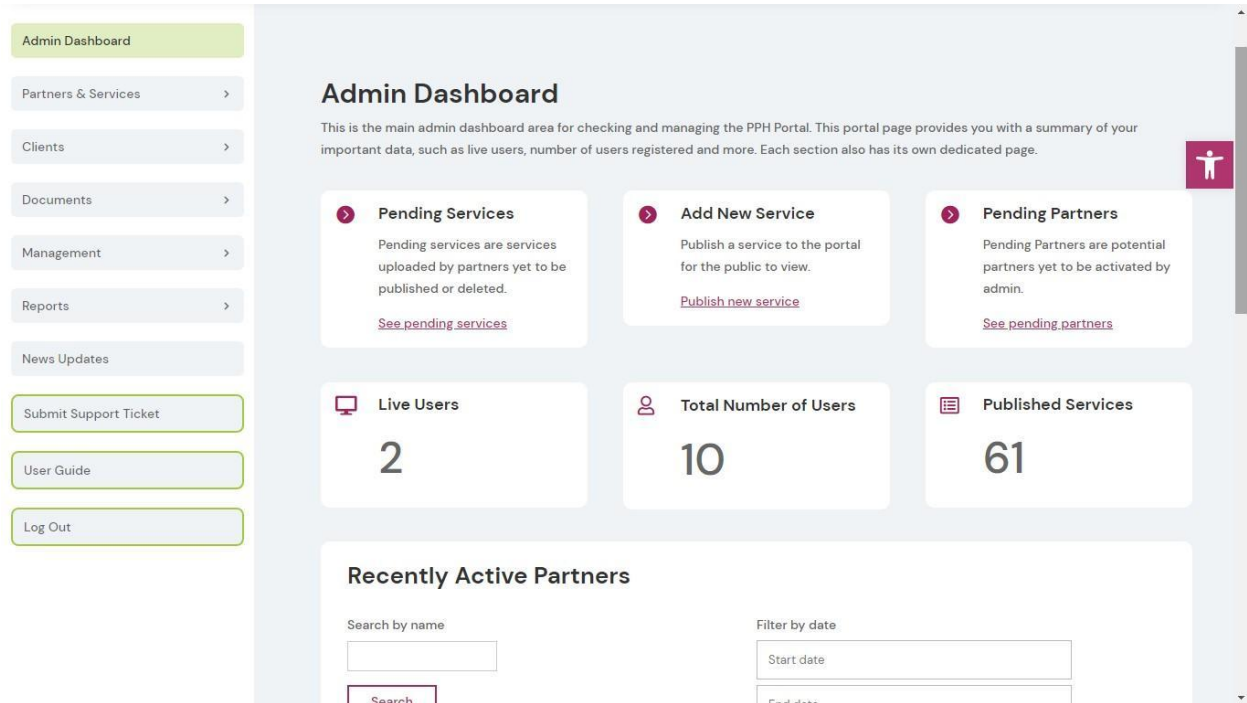


Image: 01. Admin_Dashboard.jpg


The above example is the main page used when accessing the Privilege People Hub portal when logged in as an administrator.

Partners and Clients may also login but they will however each see a different portal menu and set of screens.

The side-bar menu above displays links to important areas of the **Admin Portal**, statistics and a list of Partner accounts. They can be filtered using the various options highlighted above the top row of any data and also may be exported to a CSV or PDF file or be printed.

The left-hand menu provide administrators with access to data an Admin may require when managing the portal or data on a regular basis.

Accessibility Options

The purple box located on the right-hand side  will provide the user/administrator accessibility options that enable you to increase the text size, change the background to grayscale, apply high / negative contrast, light background, underline links or alter to a more easily readable font.

The accessibility solution is available throughout the site on every page. It hopefully helps most people use the portal in a way that suits their needs.

Partners & Services Tab

-- 01. Pending Services:

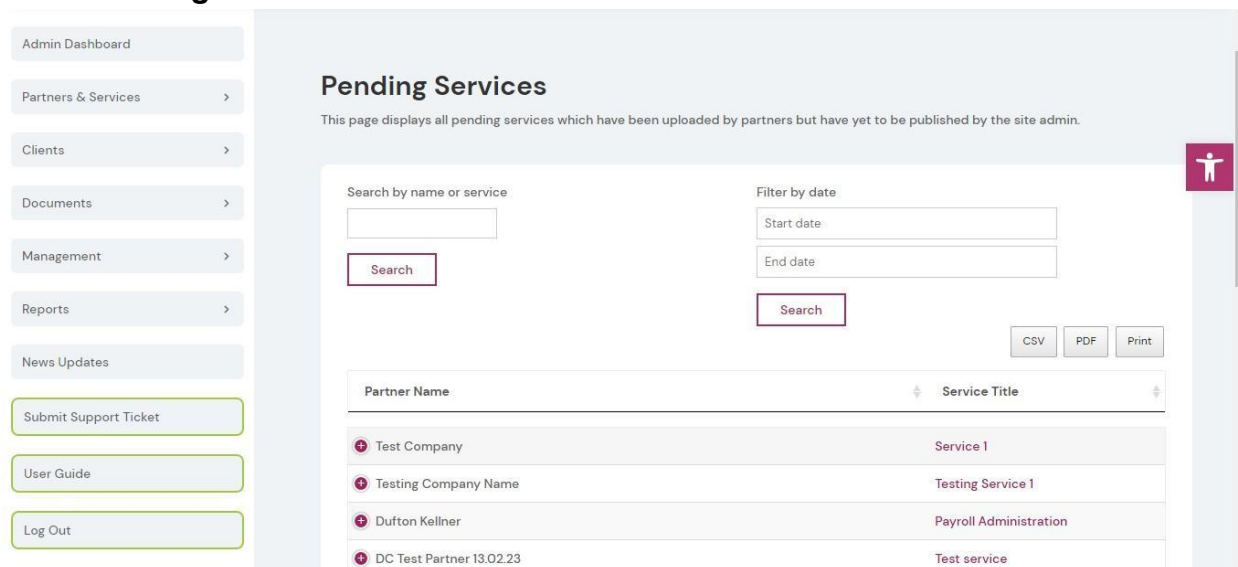


Image: 01. Pending_Services.jpg

This page displays all pending services which have been uploaded by a Partner, but have still to be published.

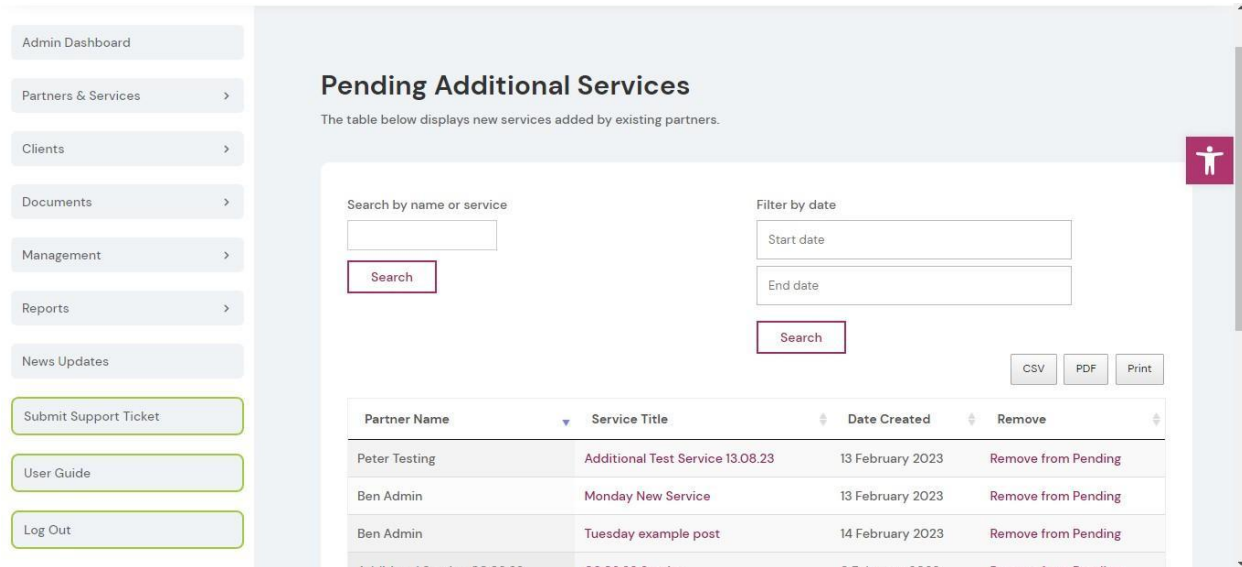
These services are listed when a Partner completes the main Partner information/registration form.

- Admin clicks on the service title to see the service submitted by a Partner.
- Admin saves the Partner service information, making the required modifications.
- Once the service is ready Admin can then use the **Add Service tab** to publish the service onto the main client facing website.

Additional Screen Options: Quick filters have been made available to better highlight data by **Partner Name, Service Title and Date Added**. You can also click on the arrows next to each of the column headings to filter data into an ascending or descending order.

Partners & Services Tab

-- 02. Pending Additional Services:



The table below displays new services added by existing partners.

Search by name or service:

Filter by date: Start date End date

CSV PDF Print

Partner Name	Service Title	Date Created	Remove
Peter Testing	Additional Test Service 13.08.23	13 February 2023	Remove from Pending
Ben Admin	Monday New Service	13 February 2023	Remove from Pending
Ben Admin	Tuesday example post	14 February 2023	Remove from Pending

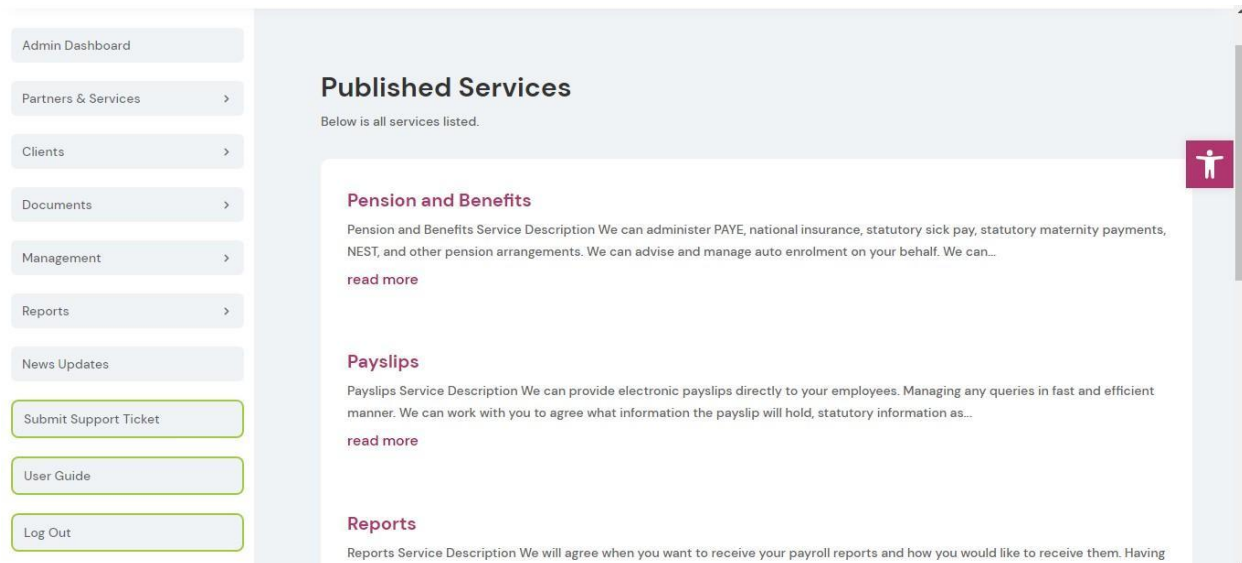
These services are listed when a Partner has an account on the portal and wants to submit further services.

- Admin clicks on the service title to view the service details as submitted by a Partner.
- Admin saves the Partner service information to file and makes required modifications.
- Once the service is ready Admin then click on the **Add Service tab** to publish the service onto the website.

Additional Screen Options: Quick filters are available to filter by **Partner Name, Service Title & Date Created**. You can also click on the arrows next to each of the column headings to display data in the ascending and descending order required.

Partners & Services Tab

-- 03. Published Services:



The screenshot shows the 'Published Services' page. On the left is a navigation menu with items: Admin Dashboard, Partners & Services (selected), Clients, Documents, Management, Reports, News Updates, Submit Support Ticket, User Guide, and Log Out. The main content area is titled 'Published Services' and contains a list of services:

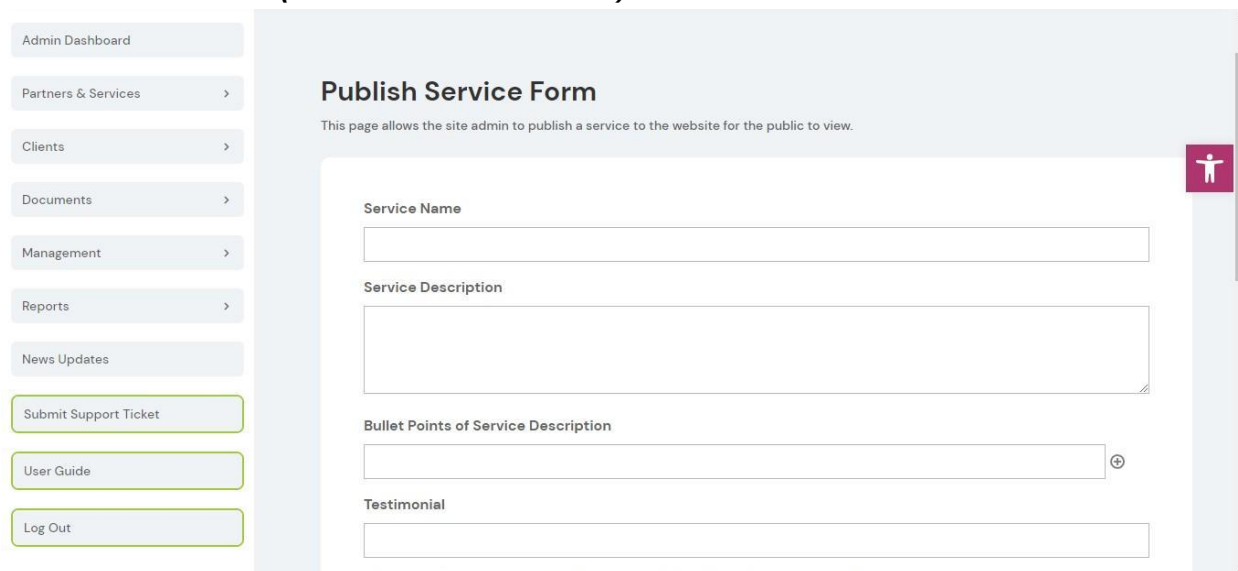
- Pension and Benefits**
Pension and Benefits Service Description We can administer PAYE, national insurance, statutory sick pay, statutory maternity payments, NEST, and other pension arrangements. We can advise and manage auto enrolment on your behalf. We can...
[read more](#)
- Payslips**
Payslips Service Description We can provide electronic payslips directly to your employees. Managing any queries in fast and efficient manner. We can work with you to agree what information the payslip will hold, statutory information as...
[read more](#)
- Reports**
Reports Service Description We will agree when you want to receive your payroll reports and how you would like to receive them. Having

This page displays a list of services currently published on the website and public facing. Admin can click on the service title to display its full information.

Please Note: When viewing the full public-facing service, Admin can also share by email the Partner's updated service to seek their confirmation / sign off.

Partners & Services Tab

-- 04. Add Service (Publish Service Form):



Post a new service, to be displayed on the website's public facing pages. Do the following:-

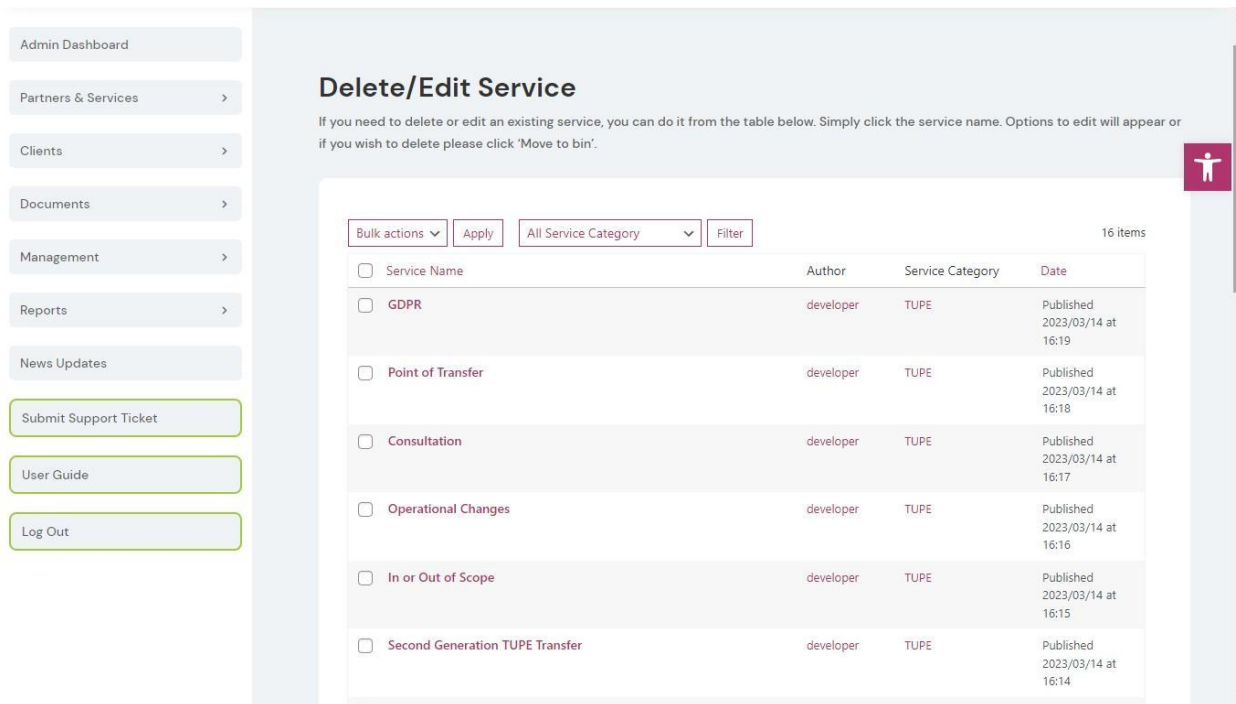
- Add a **Service Name**
- Add a **Description**
- Add **Bullet Points of Service Description** (Click the + icon on the right-hand side to add more bullet points).
- Add a **Testimonial** (If applicable)
The following will be displayed as you scroll down on the full screen on the website:
- Add **Price Starting From** (value only, eg 29.00 - don't include the '£' sign)
- Add a **Website / Video URL**
- Select the correct **Service Category**
- Select the correct **Service Icon**

Once Admin is happy with the service information, please click on **submit**. This now populates the correct page using the correct layout / format and is displayed on the client facing site. To view the service, visit the **Published Service tab** located on the Admin dashboard or view the page on the public website by visiting the correct service category.

Please Note: Once the service is added and Admin is satisfied. Admin can go back to the **Pending Services** or **Pending Additional Services** tab where they took the service information from and select the **Remove from pending option** to remove it from the list.

Partners & Services Tab

-- 05. Delete/Edit Services:



Delete/Edit Service

If you need to delete or edit an existing service, you can do it from the table below. Simply click the service name. Options to edit will appear or if you wish to delete please click 'Move to bin'.

Bulk actions All Service Category 16 items

<input type="checkbox"/> Service Name	Author	Service Category	Date
<input type="checkbox"/> GDPR	developer	TUPE	Published 2023/03/14 at 16:19
<input type="checkbox"/> Point of Transfer	developer	TUPE	Published 2023/03/14 at 16:18
<input type="checkbox"/> Consultation	developer	TUPE	Published 2023/03/14 at 16:17
<input type="checkbox"/> Operational Changes	developer	TUPE	Published 2023/03/14 at 16:16
<input type="checkbox"/> In or Out of Scope	developer	TUPE	Published 2023/03/14 at 16:15
<input type="checkbox"/> Second Generation TUPE Transfer	developer	TUPE	Published 2023/03/14 at 16:14

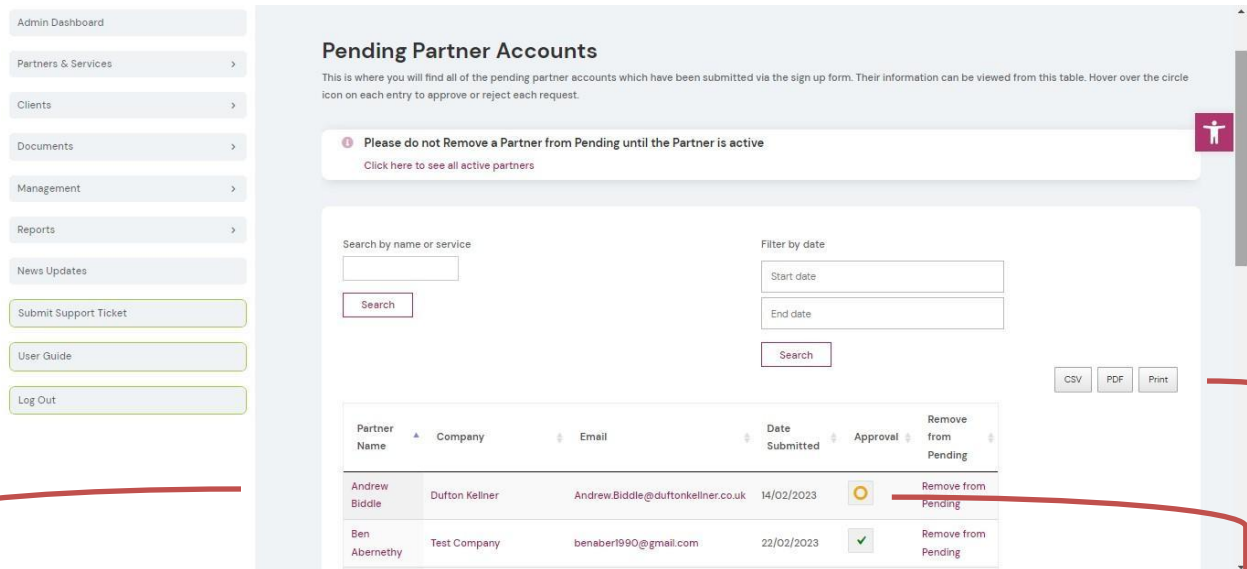
Admin **clicks** on the service they want to edit or delete.

When they do, a new screen will appear allowing Admin to make edits to the content or to delete the service completely.

Additional Screen Options: A dropdown filter is available to filter by **Service Category**. You can also click on the **Service Name** or **Date** category headings to filter data into the order you require.

Partners & Services Tab

-- 06. Pending Partner:



Pending Partner Accounts

This is where you will find all of the pending partner accounts which have been submitted via the sign up form. Their information can be viewed from this table. Hover over the circle icon on each entry to approve or reject each request.

Please do not Remove a Partner from Pending until the Partner is active
[Click here to see all active partners](#)

Search by name or service: Search

Filter by date: Start date: End date: Search

CSV PDF Print

Partner Name	Company	Email	Date Submitted	Approval	Remove from Pending
Andrew Biddle	Dufton Kellner	Andrew.Biddle@duftonkellner.co.uk	14/02/2023		Remove from Pending
Ben Abernethy	Test Company	benaber1990@gmail.com	22/02/2023		Remove from Pending

Pending Partners are listed when a Partner completes the main Partner information/registration form.

- Admin can click on the **Partner Name** or **Company** to see the pending Partner information.
- If they are happy that it's a confirmed Partner signup, they can click the **circle icon** (located under the Approval column) to turn it into a tick and approve that Partner account.

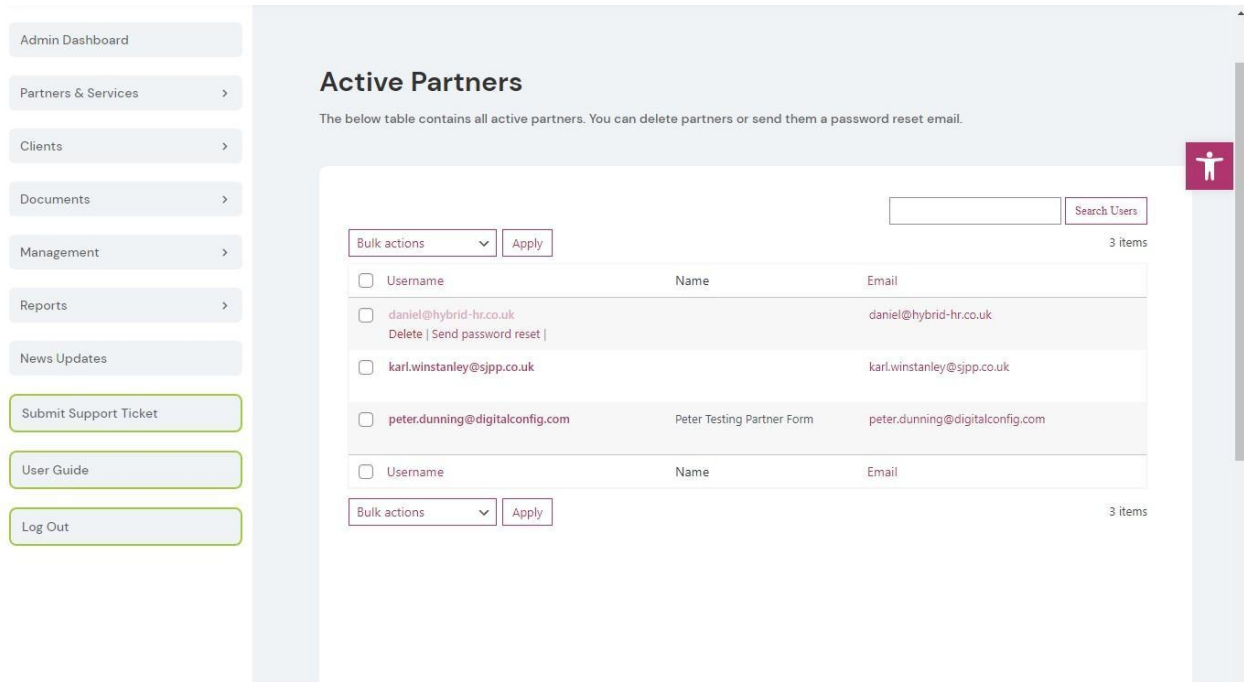
Please Note: At this stage, the Partner will receive an email that contains an activation link. When the Partner clicks the link, they will be able to log into their account using the email address and password **they** used when they completed the initial Partner information form.

Additional Screen Options: You can click on the arrows next to each of the column headings to filter data into the order you require.

Using the 3 boxes located on the right-hand side above the columns, Admin can also export data to CSV / PDF or print the data.

Partners & Services Tab

-- 07. Active Partners:



Active Partners

The below table contains all active partners. You can delete partners or send them a password reset email.

Search Users

Bulk actions Apply 3 items

<input type="checkbox"/>	Username	Name	Email
<input type="checkbox"/>	daniel@hybrid-hr.co.uk Delete Send password reset		daniel@hybrid-hr.co.uk
<input type="checkbox"/>	karl.winstanley@sjpp.co.uk		karl.winstanley@sjpp.co.uk
<input type="checkbox"/>	peter.dunning@digitalconfig.com	Peter Testing Partner Form	peter.dunning@digitalconfig.com

Bulk actions Apply 3 items

Admin will see a list of active Partners on this page.

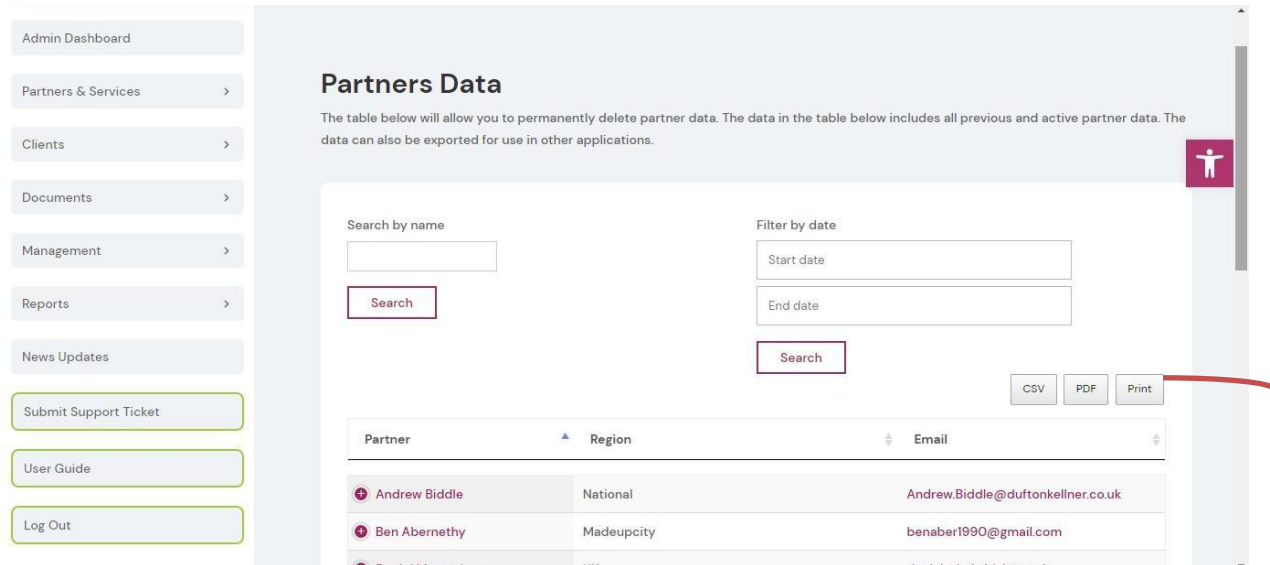
Admin can **hover the cursor** over the Partner Username to reveal their options:

- **Delete:** This option deletes the Partner from the website.
- **Send a password reset:** This option sends a password reset to the Partner so they can reset their password.

Additional Screen Options: You use the quick search box located at the top right to search by username or you can click on the column headings to filter data into the order you require.

Partners & Services Tab

-- 08. Partner Data:



Partners Data

The table below will allow you to permanently delete partner data. The data in the table below includes all previous and active partner data. The data can also be exported for use in other applications.

Search by name:

Filter by date: Start date: End date:

Partner	Region	Email
Andrew Biddle	National	Andrew.Biddle@duftonkellner.co.uk
Ben Abernethy	Madeupcity	benaber1990@gmail.com
David M... Jones	UK	david@hubid...co.uk

This is a list of all Partner profiles that have registered on the portal. **This information is displayed to a Partner within their account.**

Admin can click on any partner to see more information about them. Admin can also edit this information at anytime. i.e. **Change Name, Email Address, Mobile or Profile image.**

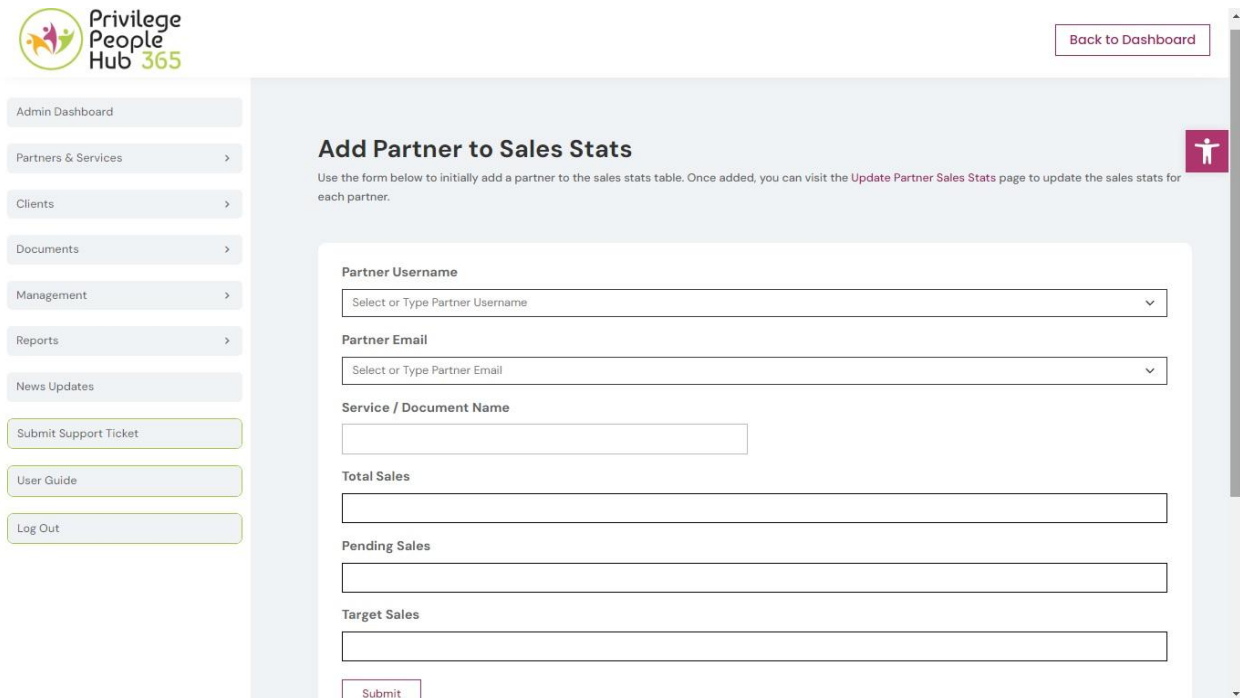
Admin has the ability to delete any Partners that are no longer required on the list.

Additional Screen Options: Quick filters are available to filter by **Partner Name & Date**. You can also click on the arrows next to each of the column headings to filter data into the order you require.

Admin can also export a list of Partners to **CSV / PDF** or they can **print** out the data using the 3 boxes located on the right-hand side above the columns.

Partners & Services Tab

-- 09. Add Partner to Sales Stats:



The screenshot shows the 'Add Partner to Sales Stats' form in the Privilege People Hub 365 admin interface. The form is located on the right side of the page, with a navigation menu on the left. The navigation menu includes: Admin Dashboard, Partners & Services (selected), Clients, Documents, Management, Reports, News Updates, Submit Support Ticket, User Guide, and Log Out. The form itself has a title 'Add Partner to Sales Stats' and a sub-header 'Use the form below to initially add a partner to the sales stats table. Once added, you can visit the Update Partner Sales Stats page to update the sales stats for each partner.' The form fields are: Partner Username (dropdown menu), Partner Email (dropdown menu), Service / Document Name (text input), Total Sales (text input), Pending Sales (text input), and Target Sales (text input). A 'Submit' button is located at the bottom of the form. A 'Back to Dashboard' button is located in the top right corner of the page.

All Partners are identified on the portal by their email address.

On this screen, Admin can identify a Partner by typing their email address into the **User Name search & Partner Email search** and selecting the correct email for the partner, ensuring both selections are identical, so the data is displayed to the correct partner.

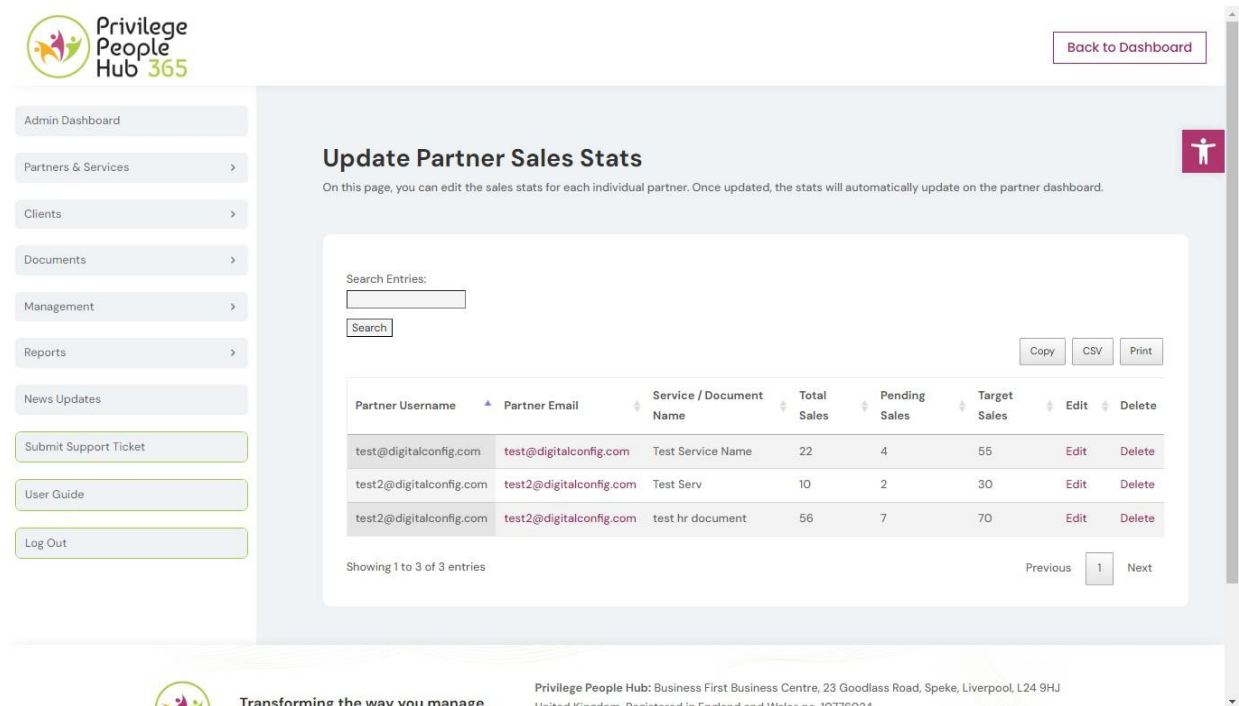
Admin also adds the **name of the Service / Document** connected to the partner and is currently being sold via PPH365.

If sales statistics already exist, then Admin can add the total figures in numbers in the boxes provided. **This information is displayed to the Partner within their account.**

Once added. The Partner, Service / Document name and their sales stats will be available to update at anytime on the **Update Partner Sales Stats** page mentioned next.

Partners & Services Tab

-- 10. Update Partner Sales Stats:



Update Partner Sales Stats

On this page, you can edit the sales stats for each individual partner. Once updated, the stats will automatically update on the partner dashboard.

Search Entries:

Partner Username	Partner Email	Service / Document Name	Total Sales	Pending Sales	Target Sales	Edit	Delete
test@digitalconfig.com	test@digitalconfig.com	Test Service Name	22	4	55	Edit	Delete
test2@digitalconfig.com	test2@digitalconfig.com	Test Serv	10	2	30	Edit	Delete
test2@digitalconfig.com	test2@digitalconfig.com	test hr document	56	7	70	Edit	Delete

Showing 1 to 3 of 3 entries Previous Next

Privilege People Hub: Business First Business Centre, 23 Goodlass Road, Speke, Liverpool, L24 9HJ
United Kingdom. Registered in England and Wales no. 10776024

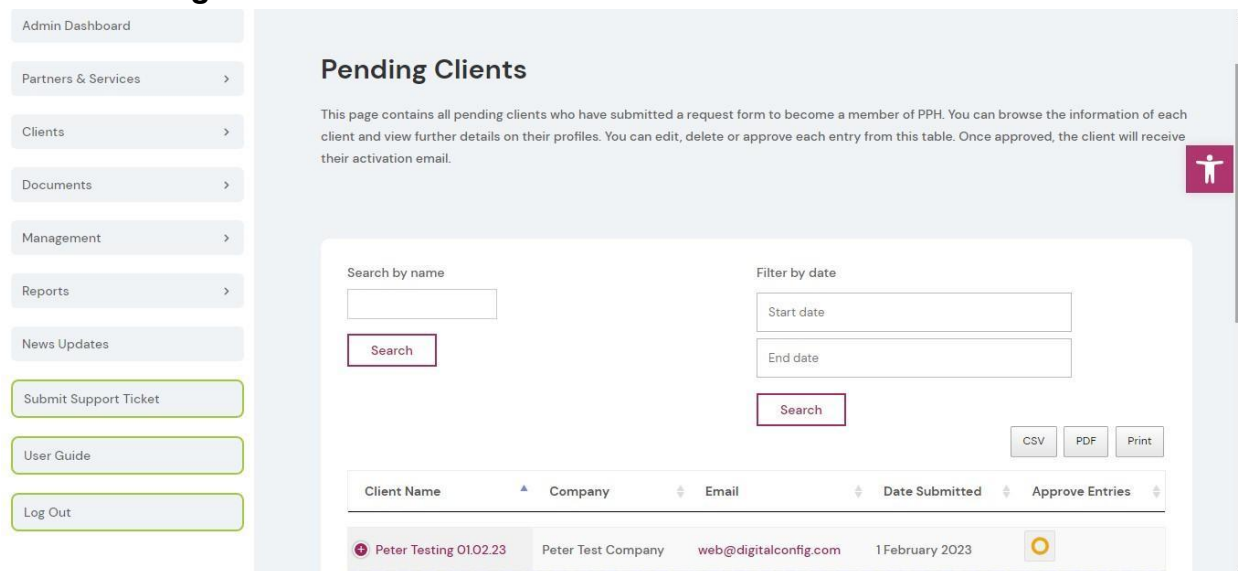
Once you have completed the previous step, this page displays the sales statistics for each partner and their service / document that's available via PPH365.

Admin can click on **edit** to update the sales statistics for each partner. Once updated, the statistics will automatically appear on the partner dashboard.

Admin can also delete a partners statistics by clicking **delete**. Once clicked, the partner stats information will be removed from this list and the Partner dashboard if it still exists.

Clients Tab

-- 01. Pending Clients:



Pending Clients

This page contains all pending clients who have submitted a request form to become a member of PPH. You can browse the information of each client and view further details on their profiles. You can edit, delete or approve each entry from this table. Once approved, the client will receive their activation email.

Search by name:

Filter by date: Start date End date

Client Name	Company	Email	Date Submitted	Approve Entries
Peter Testing 0102.23	Peter Test Company	web@digitalconfig.com	1 February 2023	<input type="radio"/>

Pending clients are listed when a client completes the main client signup form.

- Admin can click on the **Client name** to see the pending client information.
- If they are happy that it's a confirmed client signup, they can click the **circle icon** (located under the Approval column) to turn it into a tick and approve the client account.

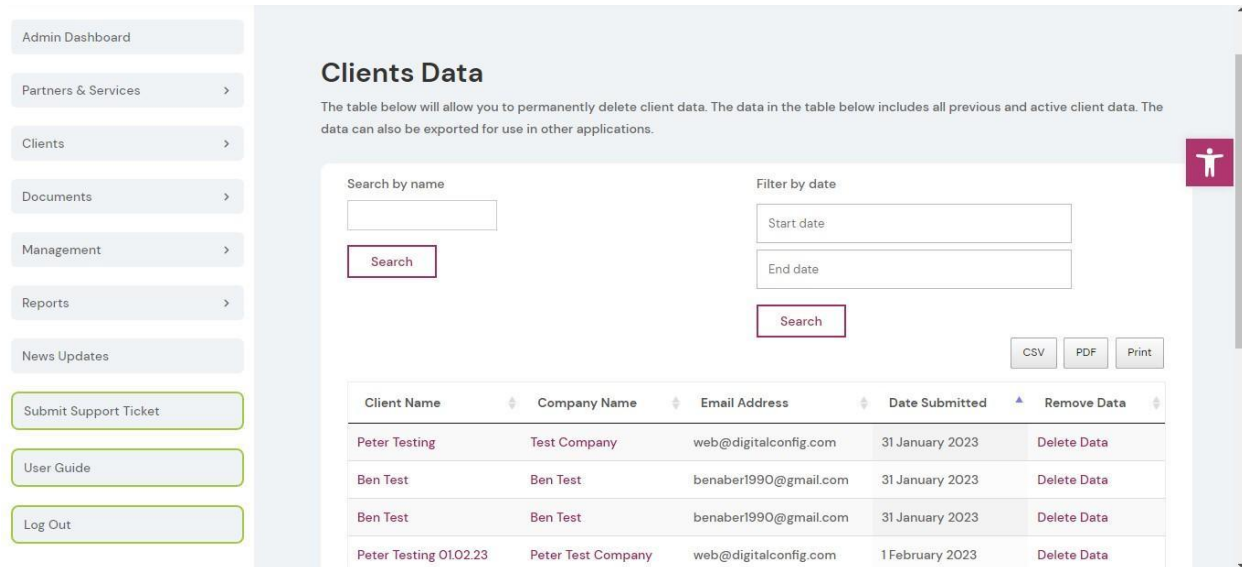
Please Note: At this stage, the client will receive an email. They will be able to log into their account using the details they provided on the **Client sign-up form**.

Additional Screen Options: You can click on the arrows next to each of the column headings to filter data into the order you require.

Admin can also export data to CSV / PDF or they can print out the data using the 3 boxes located on the right-hand side above the columns.

Clients Tab

-- 02. Clients Data:



Clients Data

The table below will allow you to permanently delete client data. The data in the table below includes all previous and active client data. The data can also be exported for use in other applications.

Search by name:

Filter by date: Start date: End date:

Client Name	Company Name	Email Address	Date Submitted	Remove Data
Peter Testing	Test Company	web@digitalconfig.com	31 January 2023	Delete Data
Ben Test	Ben Test	benaber1990@gmail.com	31 January 2023	Delete Data
Ben Test	Ben Test	benaber1990@gmail.com	31 January 2023	Delete Data
Peter Testing 01.02.23	Peter Test Company	web@digitalconfig.com	1 February 2023	Delete Data

This is a list of all clients past and present.

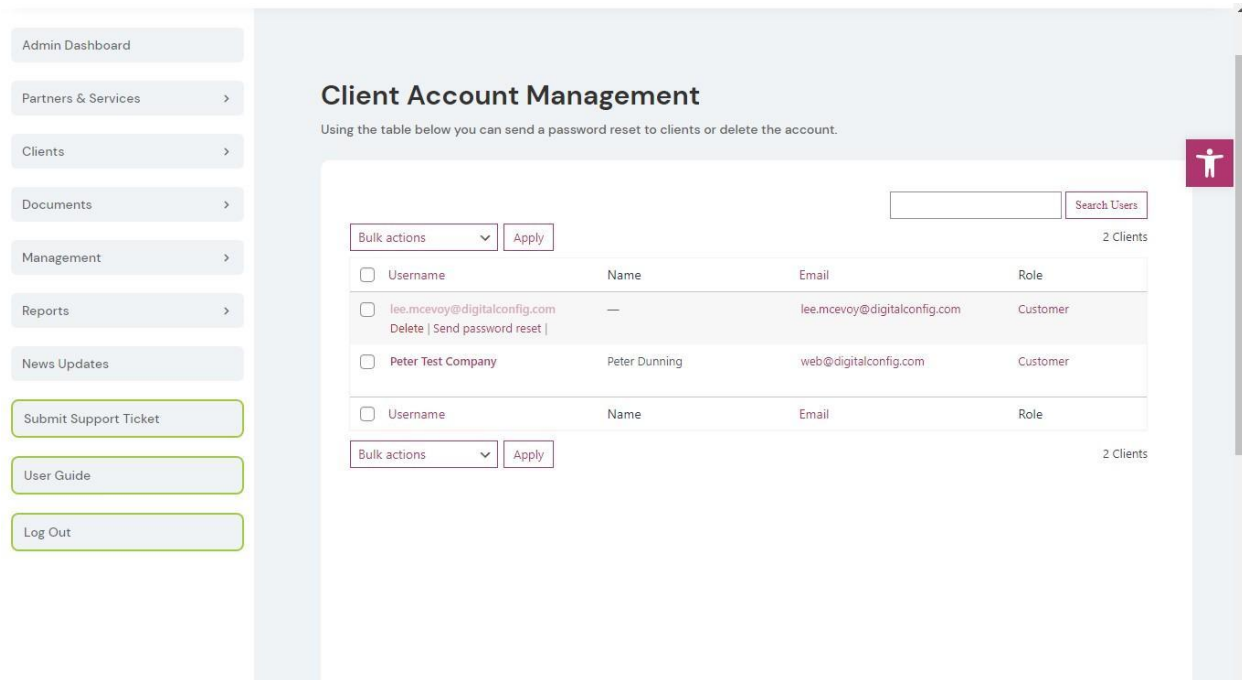
Admin has the ability to delete from the list any clients not required.

Additional Screen Options: Quick filters are available to filter by **Client Name & Date**. You can also click on the arrows next to each of the column headings to filter data into the order you require.

Admin can also export a list of clients to CSV / PDF or they can print out the data using the 3 boxes located on the right-hand side above the columns.

Clients Tab

-- 03. Client Account Management:



Client Account Management

Using the table below you can send a password reset to clients or delete the account.

Bulk actions Apply Search Users 2 Clients

<input type="checkbox"/>	Username	Name	Email	Role
<input type="checkbox"/>	lee.mcevoy@digitalconfig.com	—	lee.mcevoy@digitalconfig.com	Customer
	Delete Send password reset			
<input type="checkbox"/>	Peter Test Company	Peter Dunning	web@digitalconfig.com	Customer
<input type="checkbox"/>	Username	Name	Email	Role

Bulk actions Apply 2 Clients

Admin can see a list of active clients on this page.

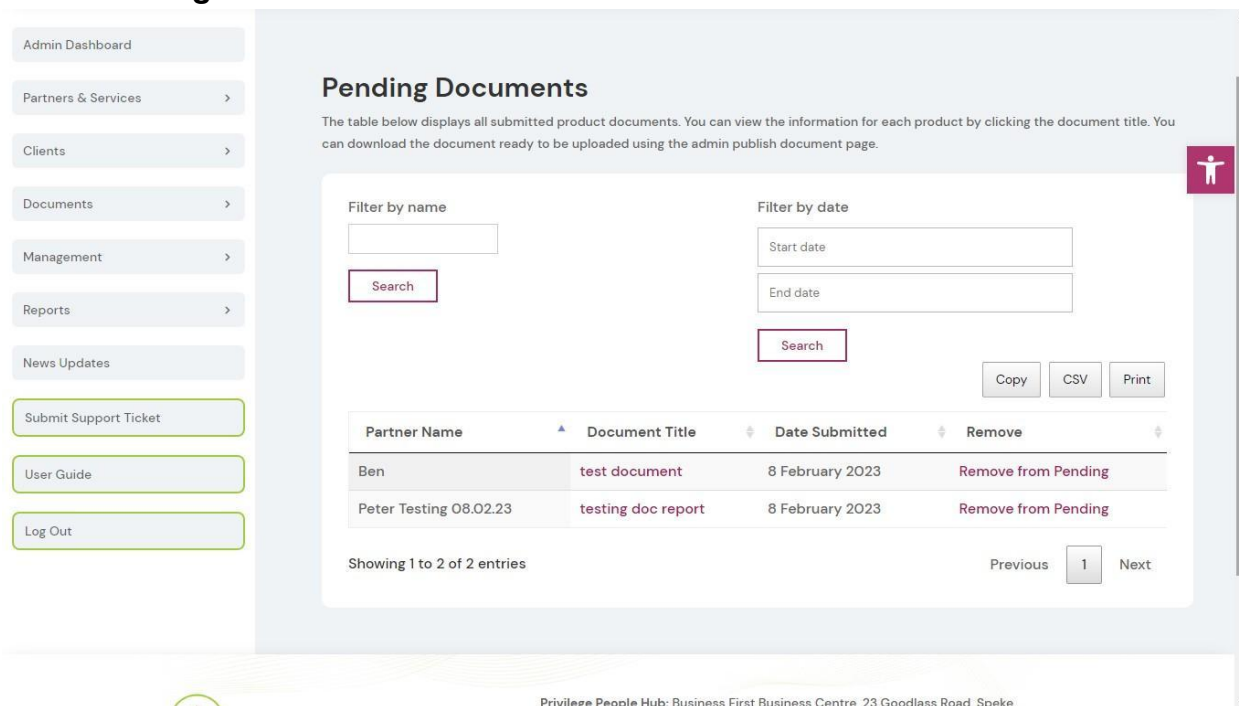
Admin can **hover the cursor** over the client's Username to reveal the options:

- **Delete:** This option deletes the client from the website.
- **Send a password reset:** This option sends a password reset to the client so they can reset their password.

Additional Screen Options: You use the quick search box located at the top right to search by username or you can click the column headings to filter data into the order you require.

Documents Tab

-- 01. Pending Documents:



Pending Documents

The table below displays all submitted product documents. You can view the information for each product by clicking the document title. You can download the document ready to be uploaded using the admin publish document page.

Filter by name:

Filter by date: Start date End date

Partner Name	Document Title	Date Submitted	Remove
Ben	test document	8 February 2023	Remove from Pending
Peter Testing 08.02.23	testing doc report	8 February 2023	Remove from Pending

Showing 1 to 2 of 2 entries Previous Next

Privilege People Hub: Business First Business Centre, 23 Goodlass Road, Speke,

When a Partner uploads a new document to the portal, it will be listed on this page.

- Admin has the ability to click the document title to display it.
- Admin may also download the chosen document to their computer to be edited.

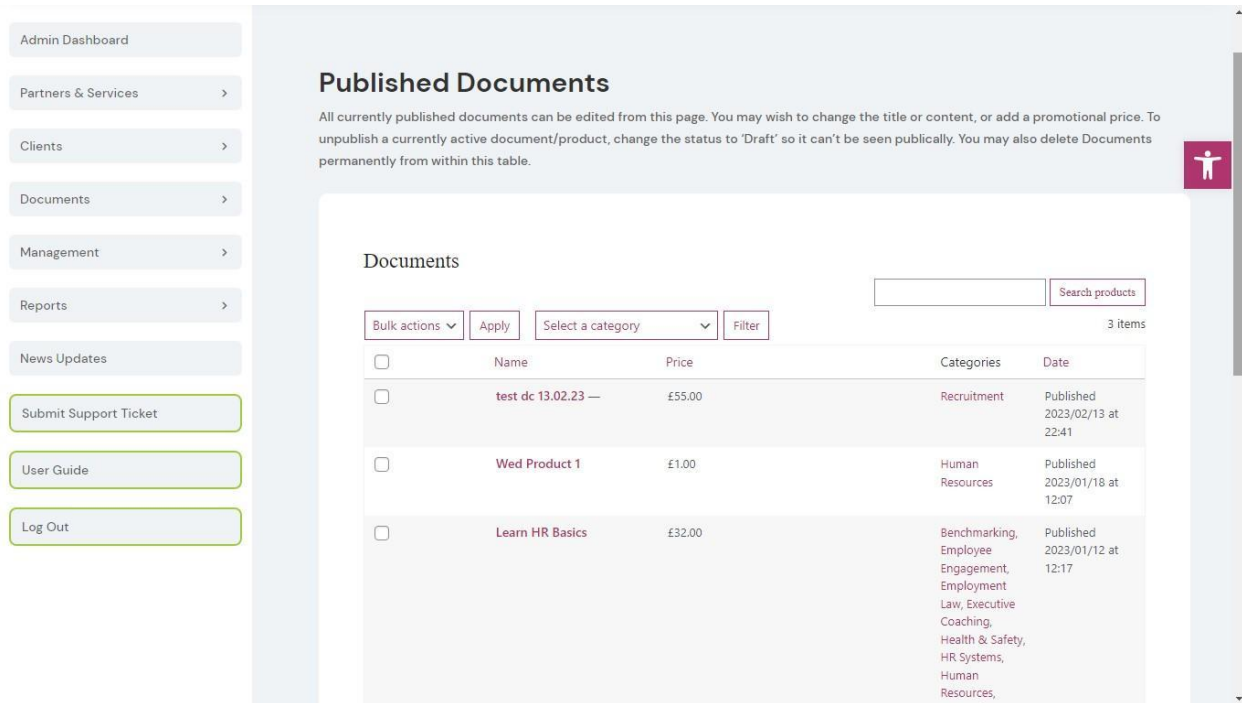
Once edited Admin can visit the [Publish Document Tab](#) to add the document to the portal for clients to then purchase / download.

Please Note: Once you have downloaded, edited and published the document you can return to this page and click remove from pending to remove it from the list.

Additional Screen Options: Quick filters are available to filter by **Partner Name & Date**. You can also click on the arrows next to each of the column headings to filter data into the order you require.

Documents Tab

-- 02. Published Documents:



Published Documents

All currently published documents can be edited from this page. You may wish to change the title or content, or add a promotional price. To unpublish a currently active document/product, change the status to 'Draft' so it can't be seen publicly. You may also delete Documents permanently from within this table.

Documents

Bulk actions Select a category 3 items

<input type="checkbox"/>	Name	Price	Categories	Date
<input type="checkbox"/>	test dc 13.02.23	£55.00	Recruitment	Published 2023/02/13 at 22:41
<input type="checkbox"/>	Wed Product 1	£1.00	Human Resources	Published 2023/01/18 at 12:07
<input type="checkbox"/>	Learn HR Basics	£32.00	Benchmarking, Employee Engagement, Employment Law, Executive Coaching, Health & Safety, HR Systems, Human Resources,	Published 2023/01/12 at 12:17

This page displays all published documents on the portal and available for clients to purchase.

Admin can hover the mouse cursor over the document name to reveal the following menu options that appear underneath the document name:

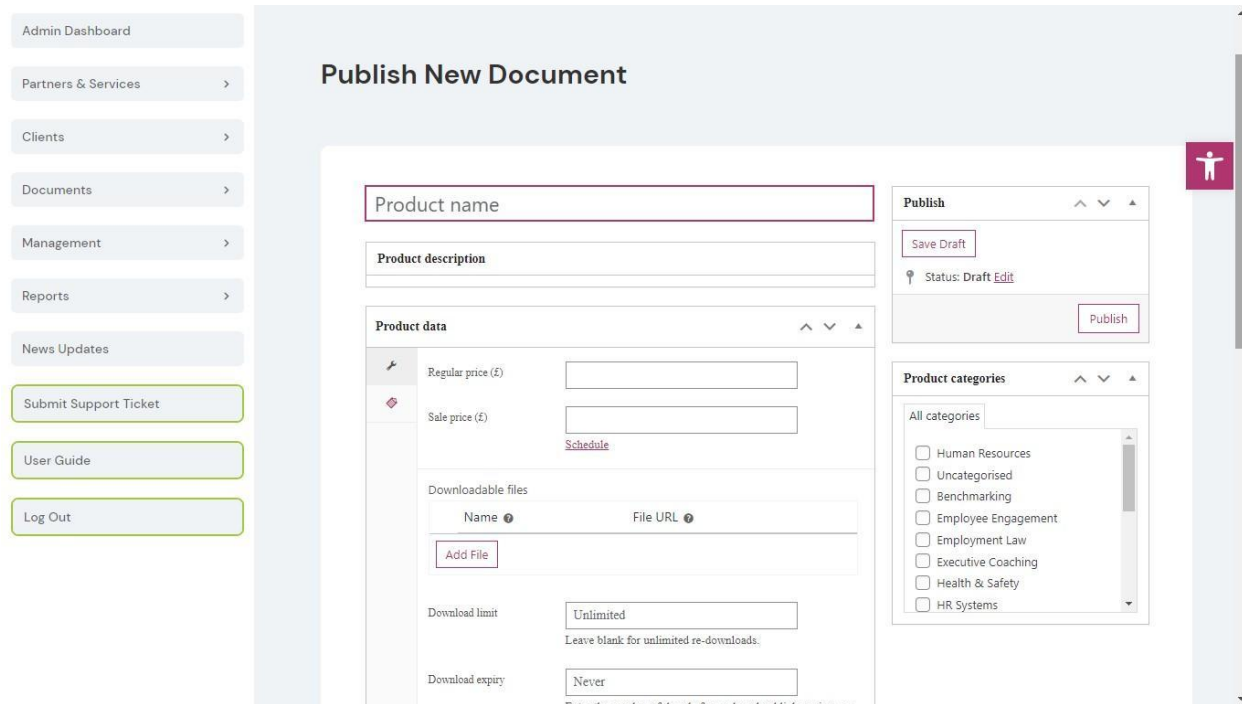
- **Quick edit:** Admin can change basic information on the document i.e. Name, Category & Price.
- **Bin:** If the document is no longer required or needs to be replaced.

The document can be added again using the publish document feature on **Publish document tab**.

Additional Screen Options: Quick filters are available to filter by **Select a Category** or by typing in the document name into the **Search products** box. You can also click the column headings to filter data into the order you require.

Documents Tab

-- 03. Publish Document:



This page allows Admin to publish a document on the portal. Once published, the document will appear internally for clients to purchase and download.

To do this, Admin will need to do the following:

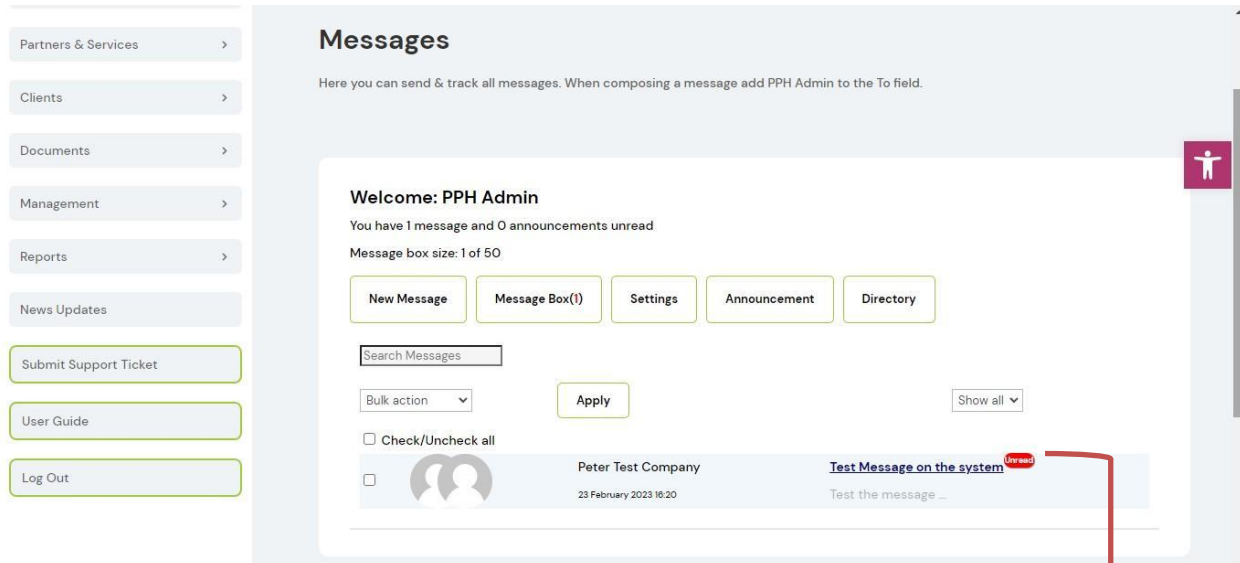
- Add a **Product Name**. (Start the document name with **Document:** followed by the full name)
- Add a **Regular Price**.
- Click on the **Add File button** (located next to Downloadable files).
- Select the correct **Product Category** (Located on the right hand menu)
- Add a **Short Description** in the provided box (Located at the bottom).

Once Admin is happy, they can simply click on the **Publish button** (located on the right-hand menu).

Please Note: Admin can click on the **Draft button** (located on the right-hand menu) to save the product as a draft. They can return later to the **Published documents page**, click on the product and set it as Published so it's available for the clients to purchase.

Management Tab

-- 01. Messages:



The screenshot shows the 'Messages' management interface. On the left is a navigation sidebar with options: Partners & Services, Clients, Documents, Management, Reports, News Updates, Submit Support Ticket, User Guide, and Log Out. The main content area is titled 'Messages' and includes a welcome message for 'PPH Admin' stating 'You have 1 message and 0 announcements unread'. Below this are buttons for 'New Message', 'Message Box(1)', 'Settings', 'Announcement', and 'Directory'. A search bar and a 'Bulk action' dropdown are also present. A message from 'Peter Test Company' is shown with the subject 'Test Message on the system' and a red 'Unread' badge. A red line from the text below points to this badge.

Admin can send and receive messages to a client on this page.

To compose a new message:

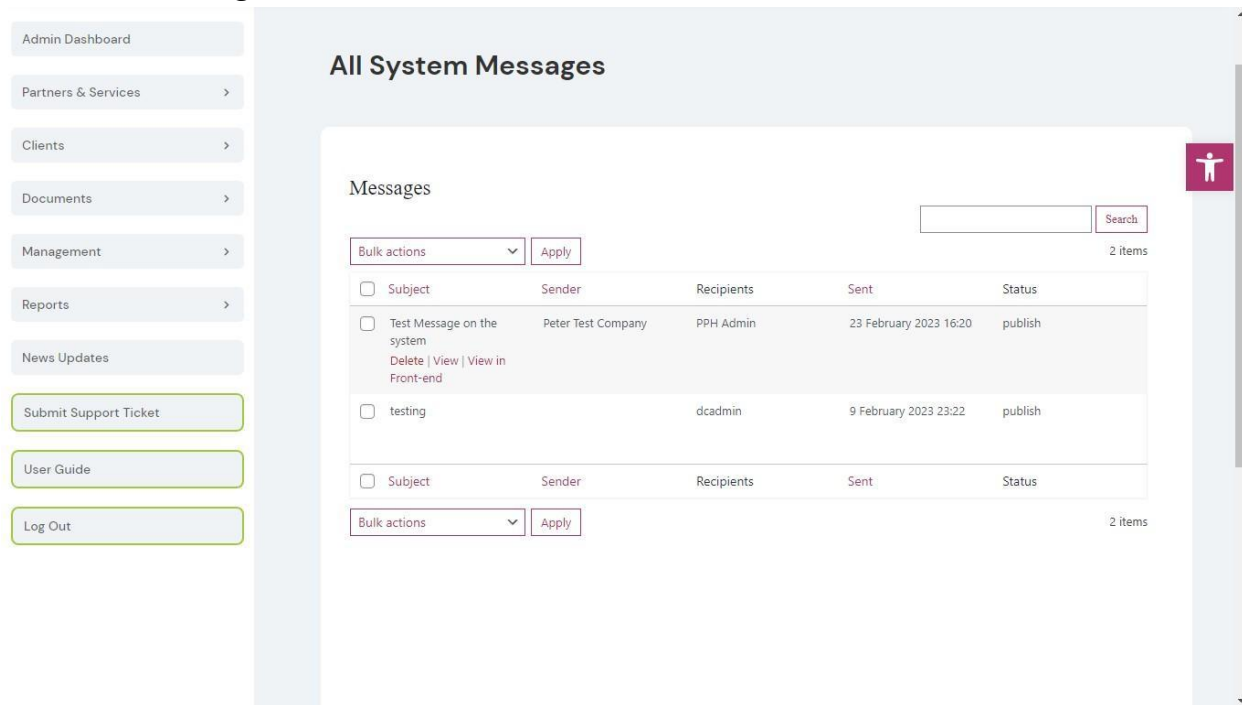
- Click the new Message box.
- **To:** Add the client's name here
- **Subject:** Add a subject to the message.
- **Message:** Add a message for the client.

If there are any **unread** messages a red box will appear.

Please Note: When a message is sent the client will receive an email notification so they know to log in to check the message and reply internally. In later stages of development and moving forward, Clients and Admin will be able to message Partners directly.

Management Tab

-- 02. All Messages:



All System Messages

Messages

Bulk actions 2 items

<input type="checkbox"/>	Subject	Sender	Recipients	Sent	Status
<input type="checkbox"/>	Test Message on the system <small>Delete View View in Front-end</small>	Peter Test Company	PPH Admin	23 February 2023 16:20	publish
<input type="checkbox"/>	testing		dcadmin	9 February 2023 23:22	publish
<input type="checkbox"/>	Subject	Sender	Recipients	Sent	Status

Bulk actions 2 items

This page displays to the Admin all messages sent via the internal messaging system.

To view a message:

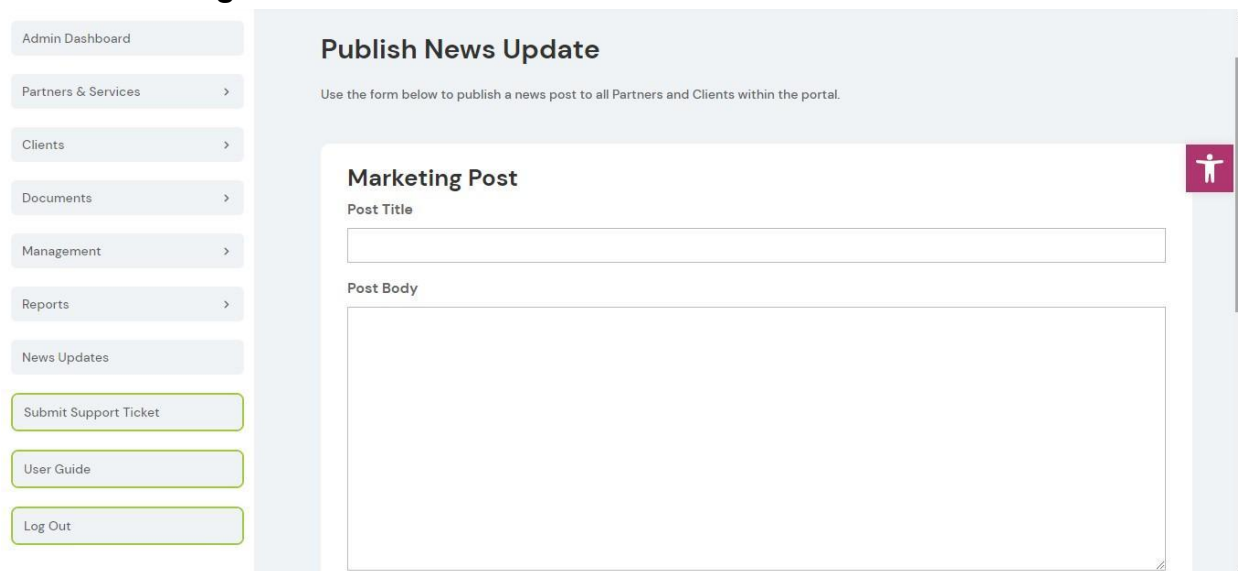
Hover the mouse cursor over the message to reveal the options:

- **Delete:** This option deletes the message from the system.
- **View:** This option allows you to view the message.

Additional Screen Options: A quick filter is available to filter by **Name**. Admin can also click on the column headings to sort data into ascending and descending order.

Management Tab

-- 03. Marketing Dashboard:



The screenshot shows a web interface for publishing a news update. On the left is a navigation menu with items: Admin Dashboard, Partners & Services, Clients, Documents, Management, Reports, News Updates, Submit Support Ticket, User Guide, and Log Out. The main content area is titled 'Publish News Update' and includes a sub-header 'Marketing Post'. Below this are two input fields: 'Post Title' and 'Post Body'. A small red icon of a person is visible on the right side of the form area.

This page allows Admin to publish an update post internally on the portal for the benefit of Partners and Clients.

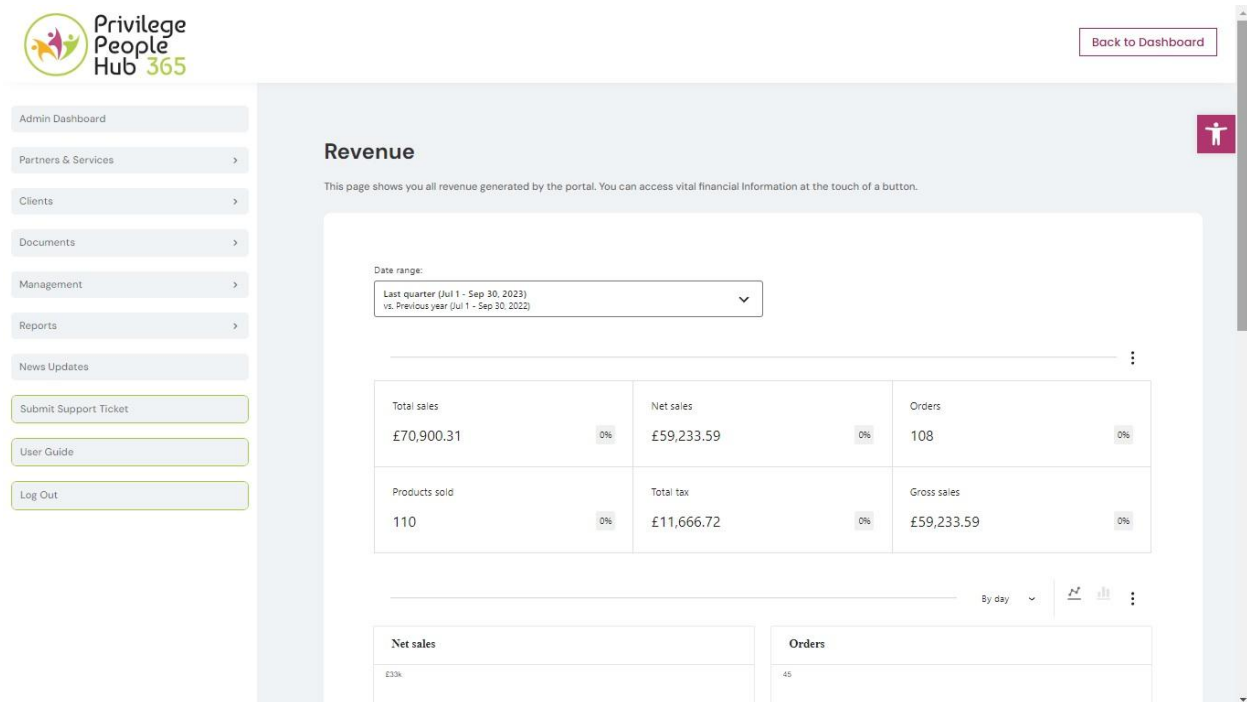
To post an update:

- Add a post **title**.
- Add your **content** to the post body.
- Add a **YouTube link** (Optional)
- Add an **image** (Optional)
- Click the Submit button to post.

Please Note: Only publish updates here that you are also happy for both Partners and Clients to see within the portal.

Reports Tab

-- 01. Revenue:



Revenue

This page shows you all revenue generated by the portal. You can access vital financial information at the touch of a button.

Date range: Last quarter (Jul 1 - Sep 30, 2023) vs. Previous year (Jul 1 - Sep 30, 2022)

Total sales	£70,900.31	0%	Net sales	£59,233.59	0%	Orders	108	0%
Products sold	110	0%	Total tax	£11,666.72	0%	Gross sales	£59,233.59	0%

By day

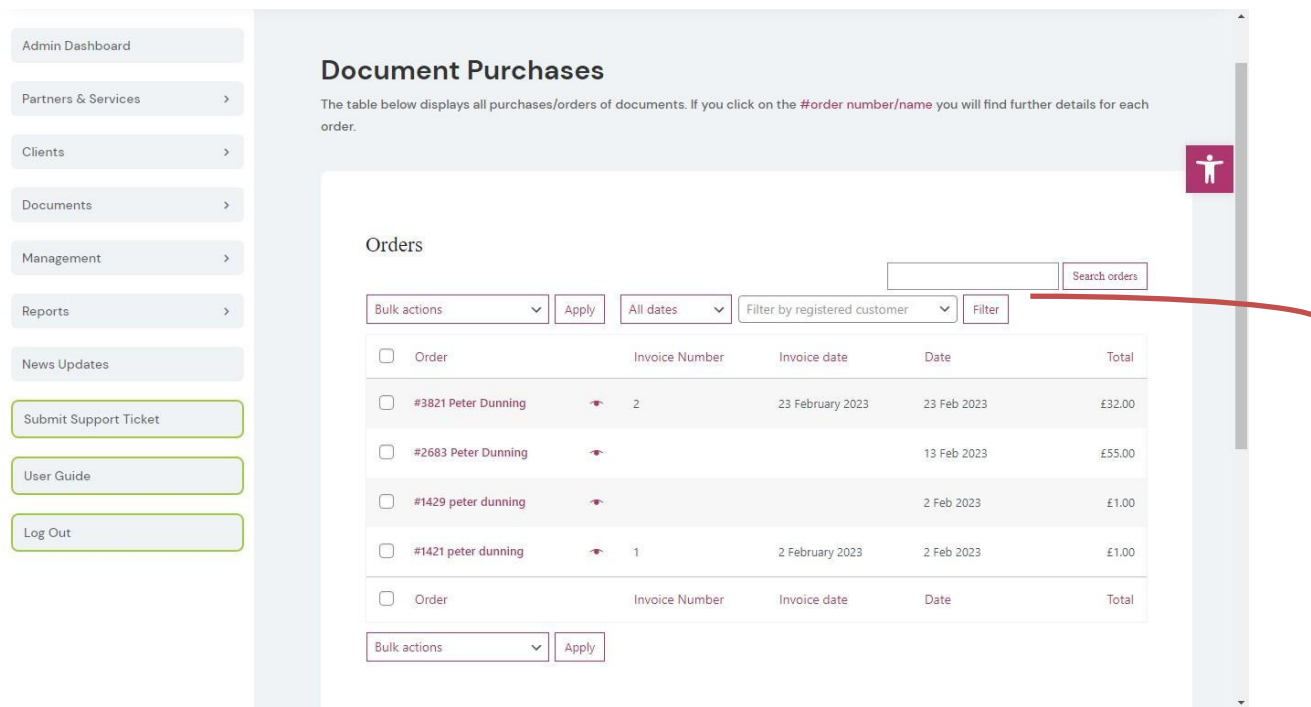
Net sales	Orders
£33k	45

One of the most important pages in the portal. Revenue reports show you an inclusive snapshot of how the portal is performing in terms of income generation.

Clicking on elements in the main overview window enables you to delve deeper in the statistics for that specific element.

Reports Tab

-- 02. Orders:



Document Purchases

The table below displays all purchases/orders of documents. If you click on the #order number/name you will find further details for each order.

Orders

Search orders

Bulk actions Apply All dates Filter by registered customer Filter

<input type="checkbox"/>	Order	Invoice Number	Invoice date	Date	Total
<input type="checkbox"/>	#3821 Peter Dunning	2	23 February 2023	23 Feb 2023	£32.00
<input type="checkbox"/>	#2683 Peter Dunning			13 Feb 2023	£55.00
<input type="checkbox"/>	#1429 peter dunning			2 Feb 2023	£1.00
<input type="checkbox"/>	#1421 peter dunning	1	2 February 2023	2 Feb 2023	£1.00
<input type="checkbox"/>	Order	Invoice Number	Invoice date	Date	Total

Bulk actions Apply

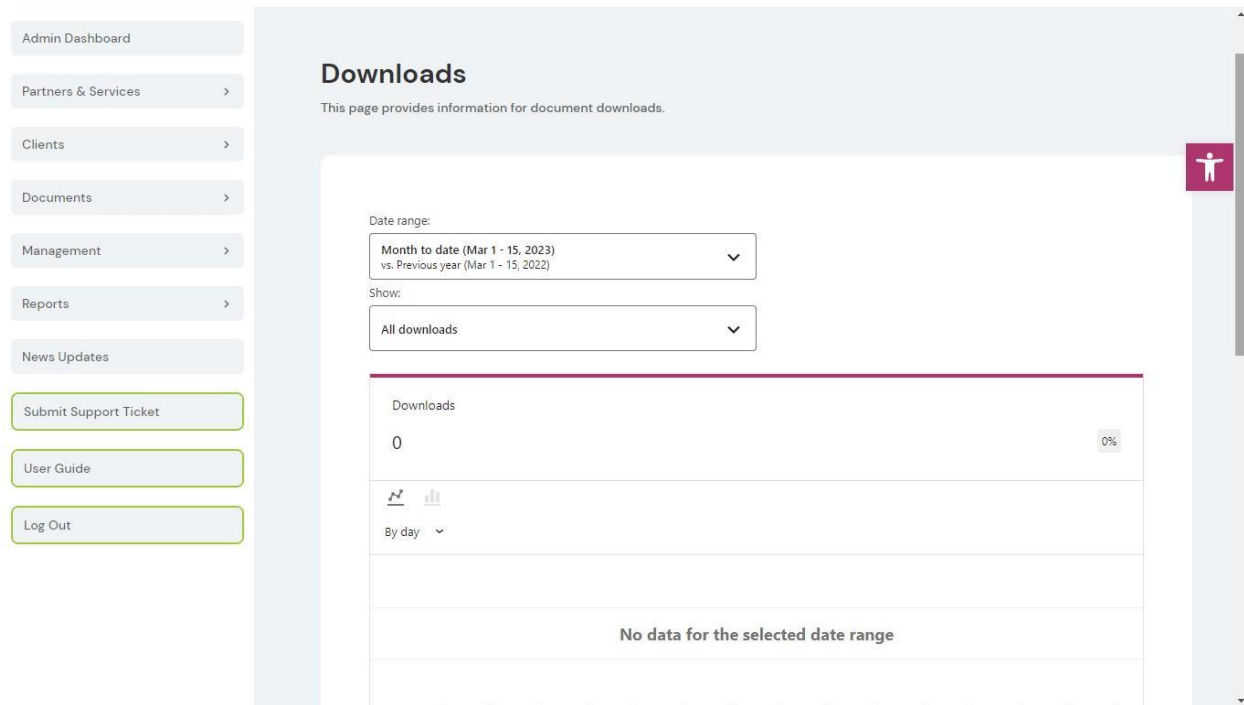
This page shows a report of all orders / purchases made by clients on this portal.

Admin can click on an order to see its full order information and to download invoices.

Additional Screen Options: Quick dropdown filters are available to filter by **Date** or **Registered Customer**. You can also click on the column headings to filter data into the order you require.

Reports Tab

-- 03. Document Downloads:



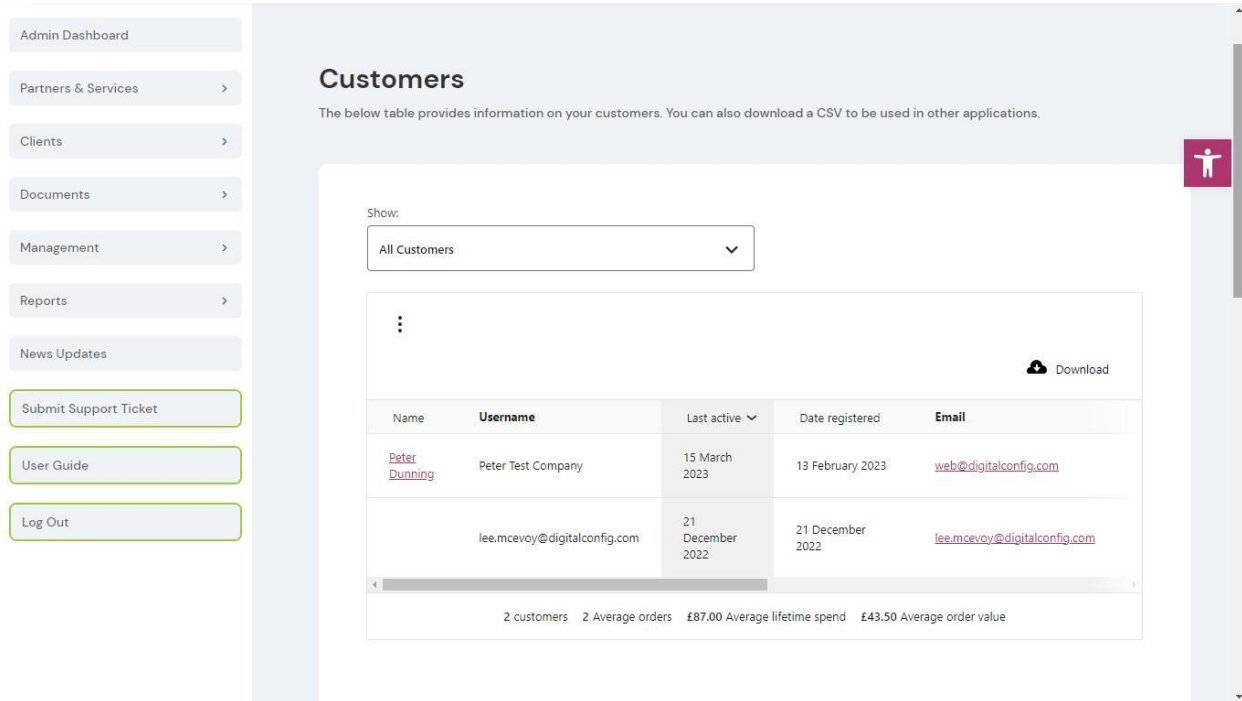
The screenshot shows the 'Downloads' report page. On the left is a navigation menu with items: Admin Dashboard, Partners & Services, Clients, Documents, Management, Reports, News Updates, Submit Support Ticket, User Guide, and Log Out. The main content area is titled 'Downloads' and includes a sub-header 'This page provides information for document downloads.' Below this are two dropdown menus: 'Date range:' set to 'Month to date (Mar 1 - 15, 2023) vs. Previous year (Mar 1 - 15, 2022)' and 'Show:' set to 'All downloads'. A chart area displays 'Downloads' with a value of '0' and a '0%' progress indicator. Below the chart are icons for a line graph and a bar chart, and a 'By day' dropdown menu. The chart area contains the text 'No data for the selected date range'.

This page shows a report of how many downloads have been made for each of the documents on the portal.

Additional Screen Options: Documents can be filtered by date range.

Reports Tab

-- 04. Customers:




Customers

The below table provides information on your customers. You can also download a CSV to be used in other applications.

Show:

⋮

 Download

Name	Username	Last active	Date registered	Email
Peter Dunning	Peter Test Company	15 March 2023	13 February 2023	web@digitalconfig.com
	lee.mcevoy@digitalconfig.com	21 December 2022	21 December 2022	lee.mcevoy@digitalconfig.com

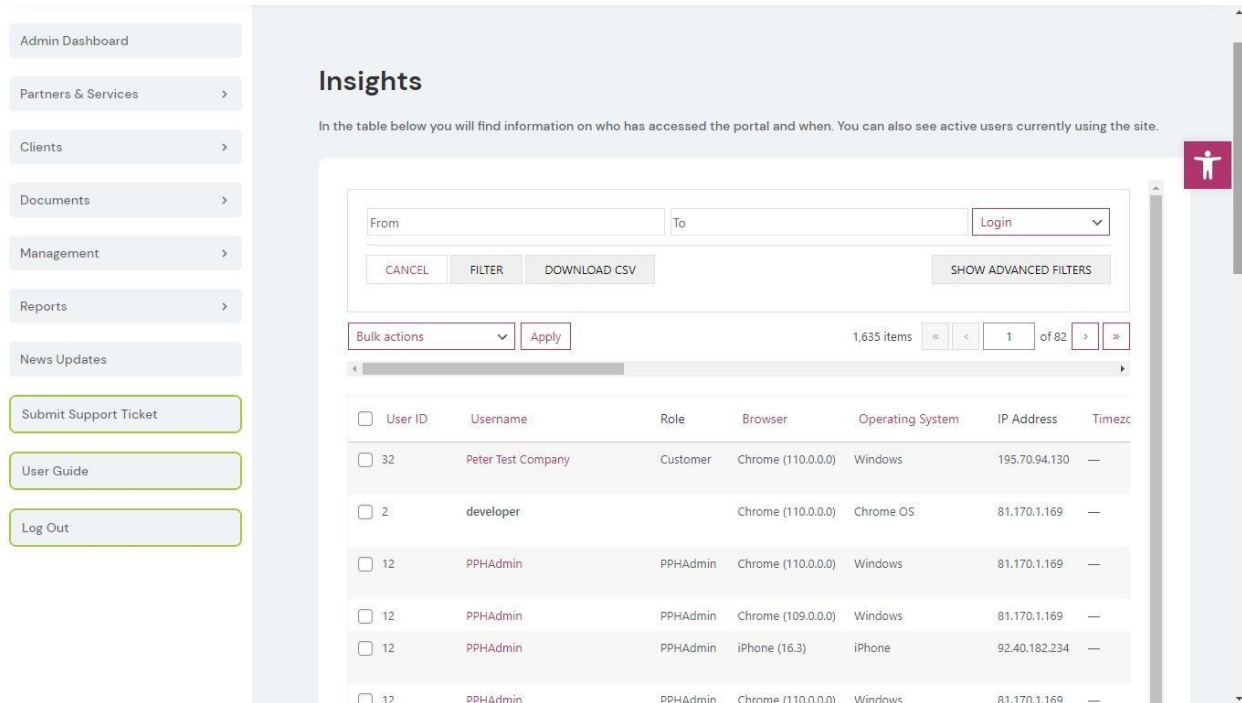
2 customers 2 Average orders £87.00 Average lifetime spend £43.50 Average order value

This page shows all clients currently registered on the portal along with all purchases that they have made.

Additional Screen Options: Full data exports can be taken by clicking on the **Download** icon located above the Name/Username columns. You can also click on the column headings to filter data into the order you require.

Reports Tab

-- 05. Insights:



Admin Dashboard

Partners & Services >

Clients >

Documents >

Management >

Reports >

News Updates

Submit Support Ticket

User Guide

Log Out

Insights

In the table below you will find information on who has accessed the portal and when. You can also see active users currently using the site.

From: [] To: [] Login: [v]

CANCEL FILTER DOWNLOAD CSV SHOW ADVANCED FILTERS

Bulk actions [v] Apply 1,635 items << < 1 of 82 > >>

<input type="checkbox"/>	User ID	Username	Role	Browser	Operating System	IP Address	Timezc
<input type="checkbox"/>	32	Peter Test Company	Customer	Chrome (110.0.0.0)	Windows	195.70.94.130	—
<input type="checkbox"/>	2	developer		Chrome (110.0.0.0)	Chrome OS	81.170.1.169	—
<input type="checkbox"/>	12	PPHAdmin	PPHAdmin	Chrome (110.0.0.0)	Windows	81.170.1.169	—
<input type="checkbox"/>	12	PPHAdmin	PPHAdmin	Chrome (109.0.0.0)	Windows	81.170.1.169	—
<input type="checkbox"/>	12	PPHAdmin	PPHAdmin	iPhone (16.3)	iPhone	92.40.182.234	—
<input type="checkbox"/>	12	PPHAdmin	PPHAdmin	Chrome (110.0.0.0)	Windows	81.170.1.169	—

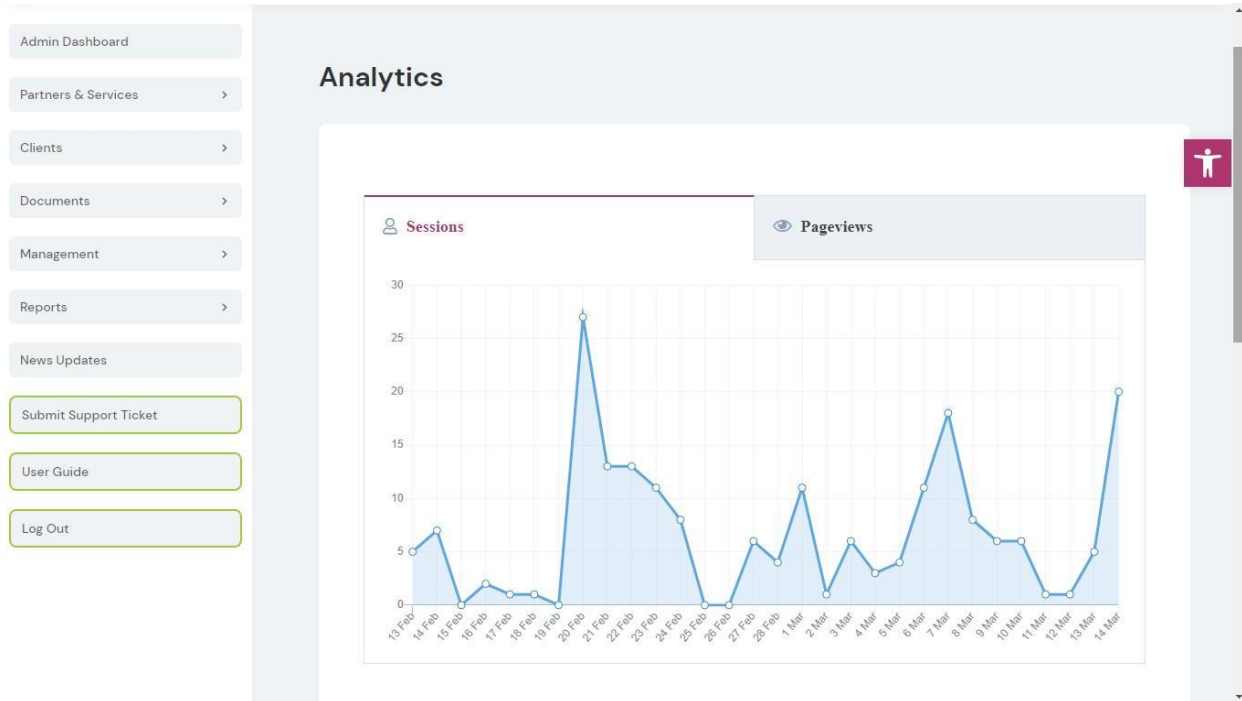
This page displays:-

1. Who has accessed the portal
2. When they accessed the portal
3. Who is currently active.

Additional Screen Options: Full filtering can be completed by using the options along the top. Data can also be exported. You can also click on the column headings to filter data into the order you require.

Reports Tab

-- 06. Analytics:



This page shows the sessions and page views within the portal. Along with the top pages / posts accessed the most.

Submit Support Ticket Tab

Submit Support Ticket

You can use this section to report any issues with the Portal directly to the website development team.

[Back to Dashboard](#)

Support Request Form

Name of Admin Submitting Form

Area of Portal With Issue

Description of Issue (please provide as much detail as possible)

Please Provide Screenshots if Possible

Drop files here or

Accepted file types: jpg, gif, png, pdf, Max. file size: 500 MB, Max. files: 5.

Date Submitted

Admin can send a support ticket to the website support team by completing this form and submitting it.

User Guide Tab

This link opens this downloadable user guide PDF designed for Admin to view at any time to act as a learning backup and should you wish to share with colleagues.

END...