

MAXISMART

Web Portal Instructions for Administrators



Administration

Managing client accounts

Viewing the client account list

1. Log-in to the application as Administrator.
2. Click the “CLIENT ACCOUNTS” tab on the main navigation bar.
3. Use the pagination controls to navigate between client accounts or to modify the number of client accounts per page.

Adding a client account

1. Consult the client accounts list.
2. Click the “Add...” button.
3. Enter the client’s information, then move on to the following step by clicking the “Next” button.
4. Enter the email addresses for each user and complete the addition by clicking on “Finish”.

Deleting a client account

1. Consult the client accounts list.
2. Click the “Delete” button of the account you want to delete within the table.
3. Confirm the deletion by clicking on the “Yes” button or cancel the deletion by clicking on the “No” button.

Viewing the general information of a client account

1. Consult the client accounts list.
2. Click on the “Open” button of one of client accounts in the table.

Modifying the general information of a client account

1. Consult the general information of the client account.
2. Click on the “Modify...” button.
3. Edit the general information of the client account then save the modifications by clicking on the “Modify” button or cancel the modifications by clicking on the “Cancel” button.

Viewing the email addresses of client accounts

1. Consult the general information of a client account.
2. Click on the “User Email Addresses” option on the vertical menu bar.

Adding email addresses to a client account

1. Consult the email address of a client account.
2. Click on the “Add...” button.
3. Enter the new email address and confirm by clicking on the “Add and send access email” button or cancel the addition by clicking on the “Cancel” button.

Deleting email addresses from a client account

1. Consult the email addresses of the client accounts.
2. Click on the trash can icon corresponding to the email address you want to delete.
3. Confirm the deletion by clicking on the “Yes” button or cancel by clicking on the “No” button.

Modifying the access codes for a client account

1. Consult the user email addresses of the client accounts.
2. Click on the “Reset password ...” button.
3. Confirm the password reset by clicking on the “Yes” button or cancel by pressing on the “No” button.

Resending an access code email to the user of a client account

1. Consult the user email addresses of the client accounts.
2. Click on the envelope icon corresponding to the email address receiving a resend.
3. Confirm the email resend by clicking on the “Yes” button or cancel by pressing on the “No” button.

General Configuration

Modifying the administrator’s email address

1. Log-in to the application as Administrator.
2. Click the “CONFIGURATION” tab on the main navigation bar.
3. Enter the administrator’s email address in the “Email address of portal administrator” field and save the change by clicking on the “Save” button.

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