



Valuation Services Client Portal

Managing User Accounts

What is covered in this quick reference guide?

- **Using the Administration Page** Page 2

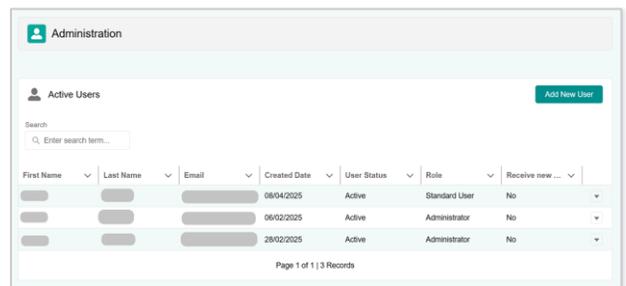
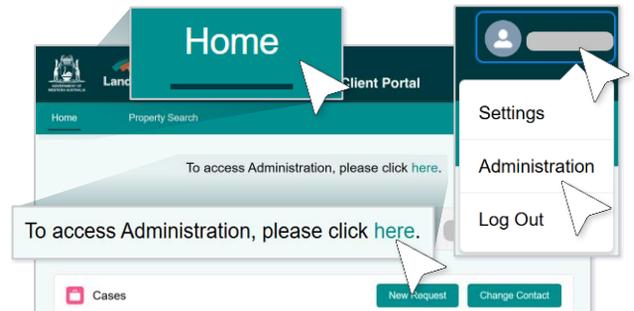
Using the Administration Page

1 Navigate to the **Administration** page by either clicking on the **'To Access Administration, please click here'** link on the **Home dashboard**, or by clicking on your **profile icon** and selecting **Administration**.

Note: Only administrators will see and have access to the **Administration** page.

Each agency must maintain at least **two administrators** in order to ensure **continuity** if an administrator is **unavailable**. It is also recommended to consider **additional administrators** to **support specific departments/business teams**.

2 On the Administration page you can view a table of all **Active Users** in your organisation.

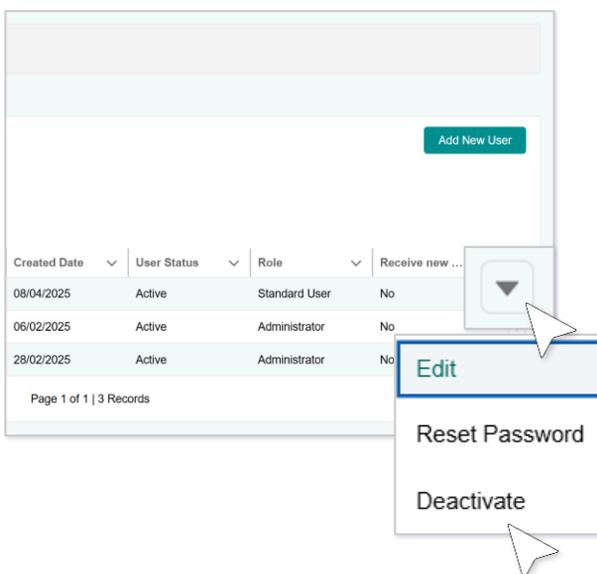


3 Access the **user row action menu** by clicking on a user's **dropdown arrow**. Here you can:

a **Edit:** Edit the details for a user such as their name, mobile number and email.

b **Reset Password:** Reset the user's password. They will receive an email to start the process.

c **Deactivate:** Deactivate a user's account to prevent them from logging into the portal.



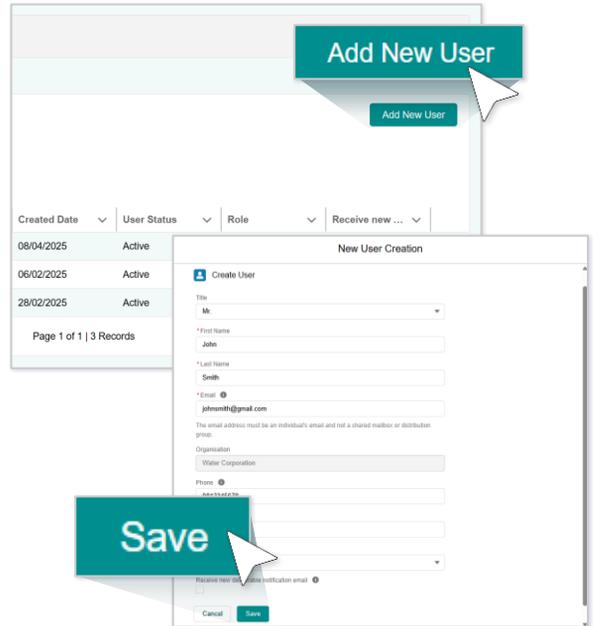
Continued on the next page...

4 You can create new users by clicking on **Add New User**.

5 Fill out the user's **details**, then click **Save**. A **welcome email** will be sent to the user, prompting them to **create a password**.

Note: The **email domain** must match the **user's organisation**.

External email addresses, shared mailboxes and distribution groups are not allowed.



Inactive Users

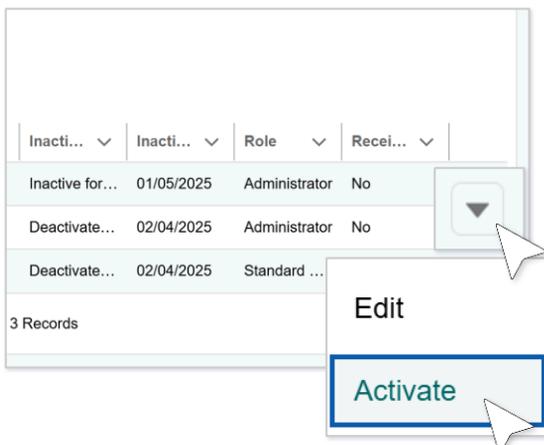
Search
Q. Enter search term...

First ...	Last N...	Email	Cre...	User ...	Inacti...	Inacti...	Role	Recei...
			31/01/2025	Inactive	Inactive for...	01/05/2025	Administrator	No
			06/12/2024	Inactive	Deactivate...	02/04/2025	Administrator	No
			17/01/2025	Inactive	Deactivate...	02/04/2025	Standard ...	No

Page 1 of 1 | 3 Records

6 The **Inactive Users** table lists all inactive users in the organisation. Inactive users are **unable to login** to the portal until the account has been reactivated.

Note: A user's account will become **inactive automatically** if they don't login for **90 days**. They will be prompted at **75 days** to login to **maintain their account**.



7 To **reactivate** an account, click on the **dropdown arrow** in a user's row, then select **Activate**.