Guide - Managing my company account (Manager Mode)

How to navigate between Portal Mode and Manager Mode

From your portal dashboard click the 'three dots' in the red box at the top right of the screen. Click 'Switch to Manager Mode.'

From your manager mode dashboard click 'Switch to Portal' on the top of the tab to the left of the screen.

Video Link: https://youtu.be/l4TzxdmgDlc

How to add a new user(s)/employee(s) to a company account

From your manager mode dashboard, click 'Users' on the tab to the left of the screen. Here you will find a list of your registered users/employees.

Click the green 'Add User' button and type in required account information. Ensure that you add your company as the main account, yourself as the direct manager and select their main role to be an 'individual'. Then click the green 'Save' button at the top right of the screen.

Video Link: https://youtu.be/lfdCpk5SqRY

How to view/amend the personal details of my user(s)/employee(s)?

From your manager mode dashboard, click 'Users' on the tab to the left of the screen. Right click on the selected user/employee and click edit. Ensure that you save any changes you make by clicking the green 'Save' button at the top-right of the screen.

Video Link: https://youtu.be/VpHiT_3XEKY

How to check the courses that a user/employee is booked on?

From your manager mode dashboard, click 'Users' on the tab to the left of the screen. Right click on the selected user/employee and click edit. Then click on courses.

You can also view any awards, documents and communications your employee has received from Warsash Maritime School.

Video Link: https://youtu.be/x2t-WxG0O3M

How to authorise delegate course requests

Managers have the ability to authorise or decline requested training from delegates. Click 'Delegates' on the tab to the left of the screen and then click 'Authorisations.' Right click on a delegate who has requested training and select 'Accept' or 'Decline.' You will also be able to see any delegate bookings that require authorisation from your dashboard.

Video Link: https://youtu.be/4plltzTdCMg

How to check the availability of courses

From your manager mode dashboard click on 'Course List.' Look at the 'Spaces left' column and you will see the availability.

Video Link: https://youtu.be/XY0gbDSXEgk

How to check the cost of a course

From your manager mode dashboard click on 'Course List' or 'Course Search.' Then look at the 'cost' column.

https://youtu.be/HIUOFerT-fQ

How to view all the available dates for a specific course

From your manager mode dashboard click on 'Course Search.' Find the course you are looking for by typing a key word into the search bar or by sorting alphabetically or by department by clicking the 'Course' or

'Categories' column hyperlink. Once you have found your course select the drop-down arrow to the far right of the row and click 'View Dates.'

Video Link: https://youtu.be/2hoWRgQdYBQ

How to make a course booking for a user(s)/employee(s)

Following on from the question above - *select on the drop-down arrow for the date you wish to book and click 'Add to basket.' From here you will be given the option to click 'View your basket' which will take you through the next steps of booking on the portal. Or you can click 'Ok' to continue to add further courses.*

Alternatively, you can also make a booking *by clicking on 'Course List' from the manager mode dashboard. Choose the course you wish to book and click on the drop-down arrow in the far-right column. Click 'Add to basket.'*

When viewing your basket check the course title and dates are correct and click the 'Next Step' button. Then assign the delegates you wish to complete the training and click 'Next Step.' Choose your method of payment whether that is by invoice or debit/credit card – your company billing address should automatically appear. Type in a PO number if preferred, tick the I have read the terms and conditions box and then click 'Pay Now.' You will then receive a booking summary.

Video Link: https://youtu.be/-6wJ0CLHvHo

How to cancel a user(s)/employee(s) from courses

From your manager mode dashboard click on 'Delegates.' Choose the delegate and ensure you have selected the course you wish to cancel them from. Click on the drop-down arrow in the far right-hand column and click 'Request Cancellation.'

Your company will not be charged if you cancel a booking two weeks before the course start. However, please note that your company will be charged the full cost if you cancel within two weeks and a replacement delegate can't be found.

For further information please see our cancellation policy.

Video Link - https://youtu.be/GGytooR4ei0

How to make a provisional booking

You can make a provisional booking if you wish to reserve a space on a course without knowing which of your delegates/employees will complete the training at the point of booking.

Follow the same steps as the 'How to make a course booking section.'

However, to make it a provisional booking, do not assign a delegate. Leave this blank and process like normal.

Please note that delegates must be assigned two weeks prior to the course start or you will risk losing your bookings. Please refer to our bookings policy. Reminder emails will be sent out

Video Link: https://youtu.be/XkL2MBh5_VA

How to add a user/employee to a provisional booking

From your manager mode dashboard, click 'Placeholders' and you will see a list of your company's provisional bookings.

Right click on a provisional booking and click 'Maintain.' Click the grey 'Select' box and choose the delegates you wish to assign to the course. Then click the green 'Save & Close' button.

Please note that the users/employees must already be saved. As mentioned above delegates must be assigned two weeks prior to the course start or you will risk losing your bookings. Please refer to our bookings policy. Reminder emails will be sent out.

Video Link: https://youtu.be/ffnkcaXyU80

How to view a company invoice(s)

From your manager mode dashboard, click 'Finance,' then click 'Invoices' and you will be able to see a list of all the invoices that have been generated from your company's account. To view an invoice, select the drop-down arrow to the far-right of the row and then click 'view'.

Video Link: https://youtu.be/HWn9x9racYc

How to pay a company invoice(s)

From your manager mode dashboard, click 'Finance,' then click 'Invoices' and you will be able to see a list of all the invoices that have been generated from your company's account. To pay an invoice, select the drop-down arrow to the far-right of the row and then click 'pay.' Select your payment method and click 'Make Payment.' Then proceed by entering your payment details.

Video Link: https://youtu.be/CMCUHzg7Mhk