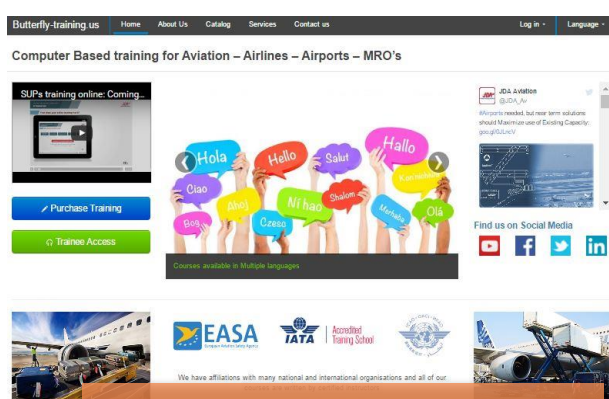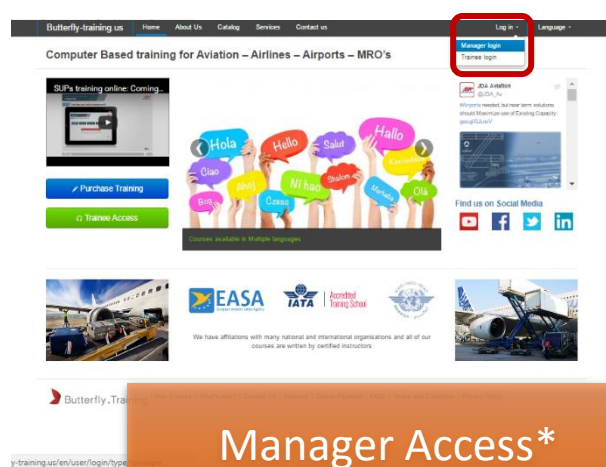# User Guide :

Manager Account
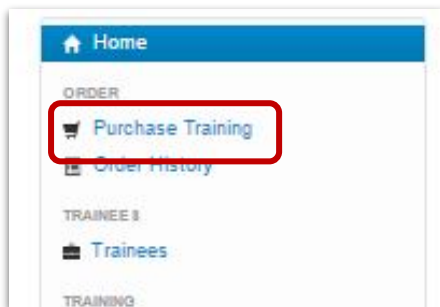
① Manager login

Homepage

Manager Access*

Enter your login**
and password

*Click login in the top right corner **Manager Log always starts with the letter « M » as « Manager »
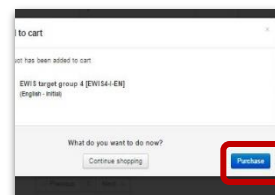
From your Manager Account, Click on Purchase Training

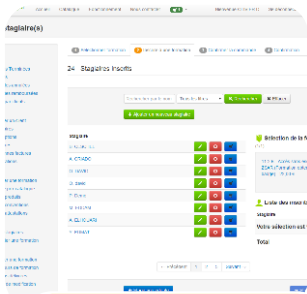Select training from our catalogue**

Click on "Add to cart"

Click on "Purchase"

Select the language and Initial or Recurrent where necessary

You are then directed to the
**Trainee Selection and Assignment
Page. Here we have two options:**

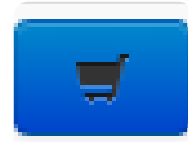*Choose an existing trainee from the Trainee list*
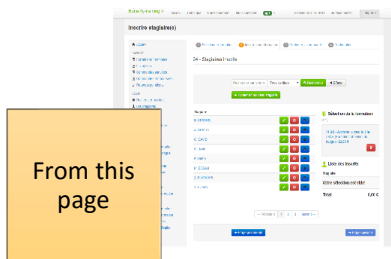

Scroll through the Trainees List

Or Search the Trainee
• by surname

Then click on the blue cart besides his/her name

Create a new Trainee Account

From this page

Click on "Add new trainee user"

Write the First, Last Name
and Birth Date
of your trainee***

Enter Trainee Details

First name *
Last name *
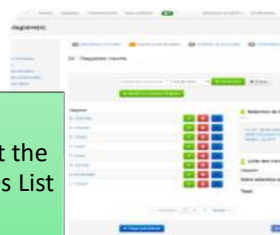
Click on "Add"

Look at the Trainees List

or Search by Surname

Then click on the blue cart besides his/her name

*** these are the mandatory fields. The Manager is solely responsible for determining identity of the trainees on his account

Assign list

Trainee

⊙ Jane Doe

Total $75.00

Trainee name appears at the bottom right of your screen which means that you are about to register this trainee to a new training

You can add and assign as many trainees as you like using this method, the total price will be updated accordingly.

Assign list

Trainee

⊙ Jane Doe

⊙ Robert Smith

Total $150.00

Click on « Next Step », then Read and Accept "Terms and Conditions" if you agree

① Select training ② Assign training ③ Confirm Order ④ Confirmation

Order summary

Training order

Training	Unit price	Quantity	Subtotal	Training Details	
EWIS target group 4 [EWIS4-I-EN] (English - Initial)	$75.00	2 ✎	$150.00	Jane Doe Robert Smith	🗑
Vat @ 0.00 %			$0.00		
Grand total			$150.00		

Payment Method

◉ Credit card

PO Number (if any) [   ]

Terms and conditions

Terms and conditions *   ☐ I have read and agree to the Terms and Conditions *View*

Terms and conditions

Terms and conditions *   ☐ I have read and agree to the Terms and Conditions *View*

→ Next step

Once your Order is validated, you receive an email with our Order Summary and your Trainee Log in and Password
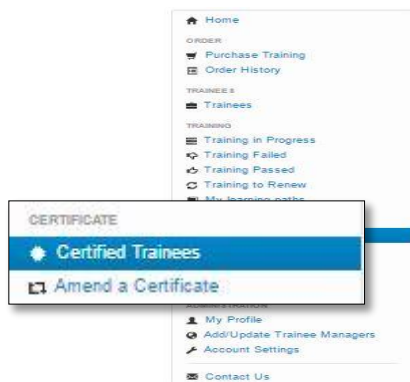
Give your Trainee his/her login details so he/she can start training.

Once the training is validated, you receive an email with the trainee certificate

③ Where to find a certificate?

➢ From your Manager Account, Click on Certified Trainees

💡 You can search for the certificate by First Name, Last Name and Login Username

④ How to ask for a certificate amendment?

➢ From your Manager Account, Click on Amend a Certificate

➢ Select a certificate and Click on Amend

Demonstration Only#5	BLOCK1-EN	3/3/17	3/15/17	82.1%	75%	ⓘ Amend

Enter correct First Name and Last Name and write the reason for your change request and Click on **Amend**.

Certificate amend form

|	
Correct First Name	
Correct Last Name	
Correct Company Name	
Reason(s)	

➢ Please note that changes are not automatic. All requests must be validated and only allowed in cases of adding middle names or small spelling corrections. Butterfly Training keeps all requests on file and are available at all times to the appropiate authorities.
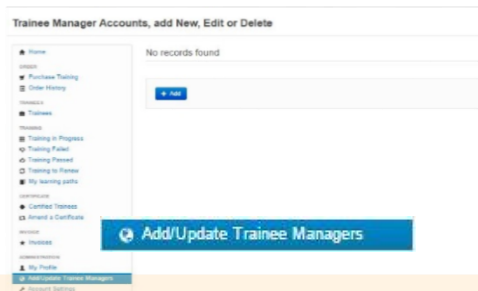
I am looking for an invoice, how can I find it?

⑤

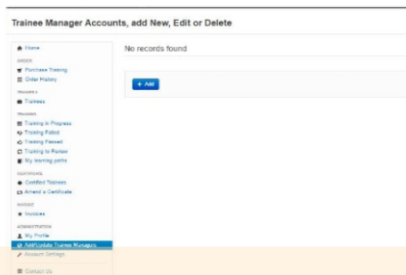➢ From your Manager Account, Click on <u>Invoices</u>
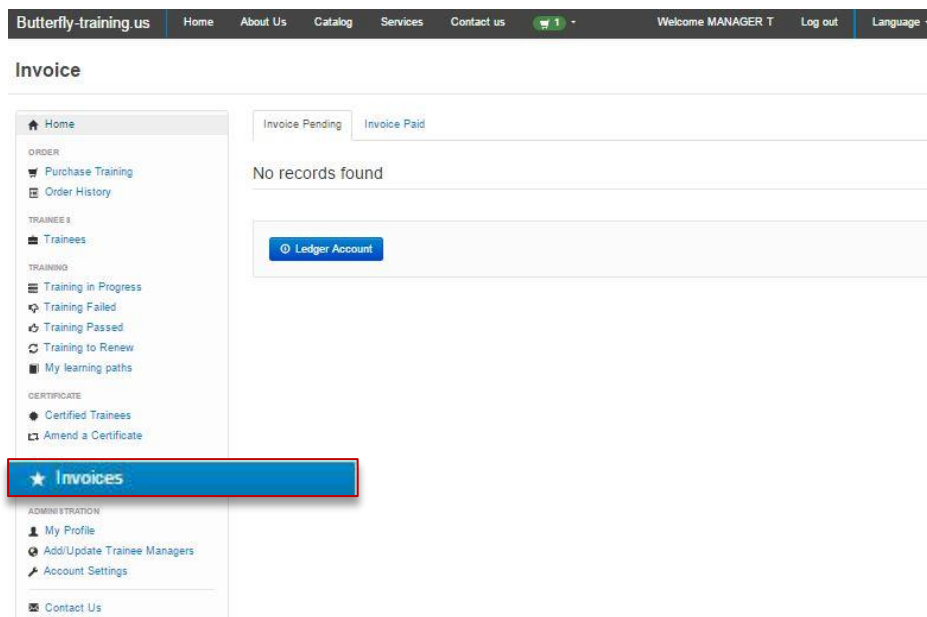
⑥ How to create a new manager?

Trainee Manager Accounts, add New, Edit or Delete

+ Add

Add/Update Trainee Managers

Click on "Add"

From your Manager Account, Click on "Add/Update Trainee Managers"

Trainee Manager Accounts, add New, Edit or Delete

+ Add

Click on "Add"

Fill in the Form*

You receive a confirmation email with the log in and password of the new manager.

Title, First Name, Last Name, email and phone number of the new Manager are mandatory fields

💡 **To erase a Manager from your Account, Click on "Add/Update Trainee Manager", click on « Actions » and then « Delete »**
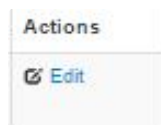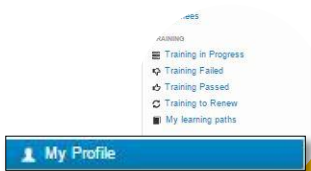
(7) How to change an email address?

Click on "Submit"

Then, change the email address on the dedicated field

Actions
Edit

Click on "Edit"

Click on "My Profile"