benefits cloud

Benefits Cloud

Super User Guide

Welcome!

Welcome to Benefits Cloud. As a Super User you can manage your organisation's access to the benefits and offers we provide.
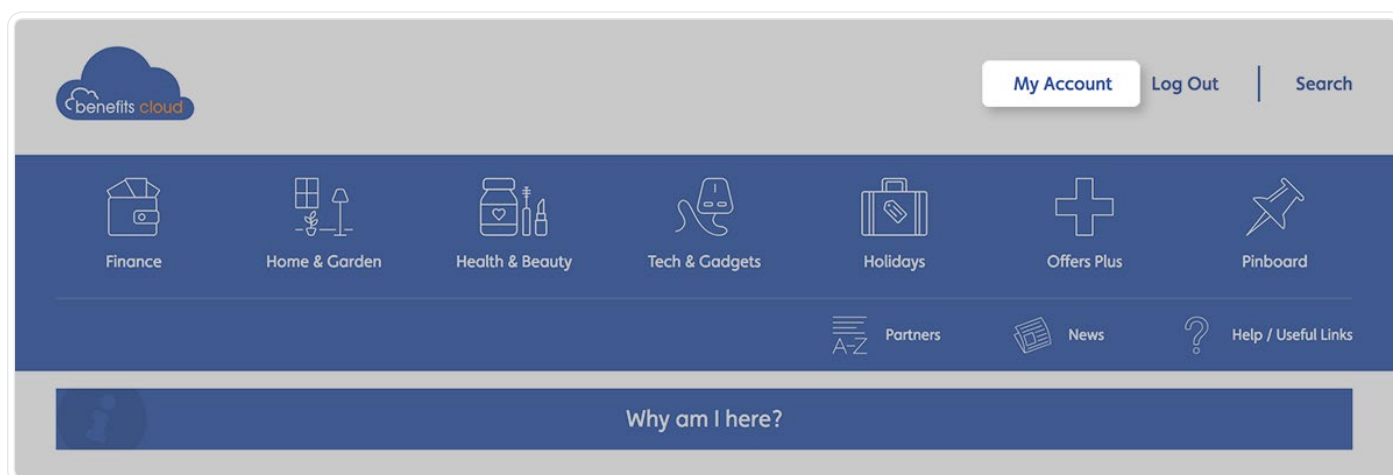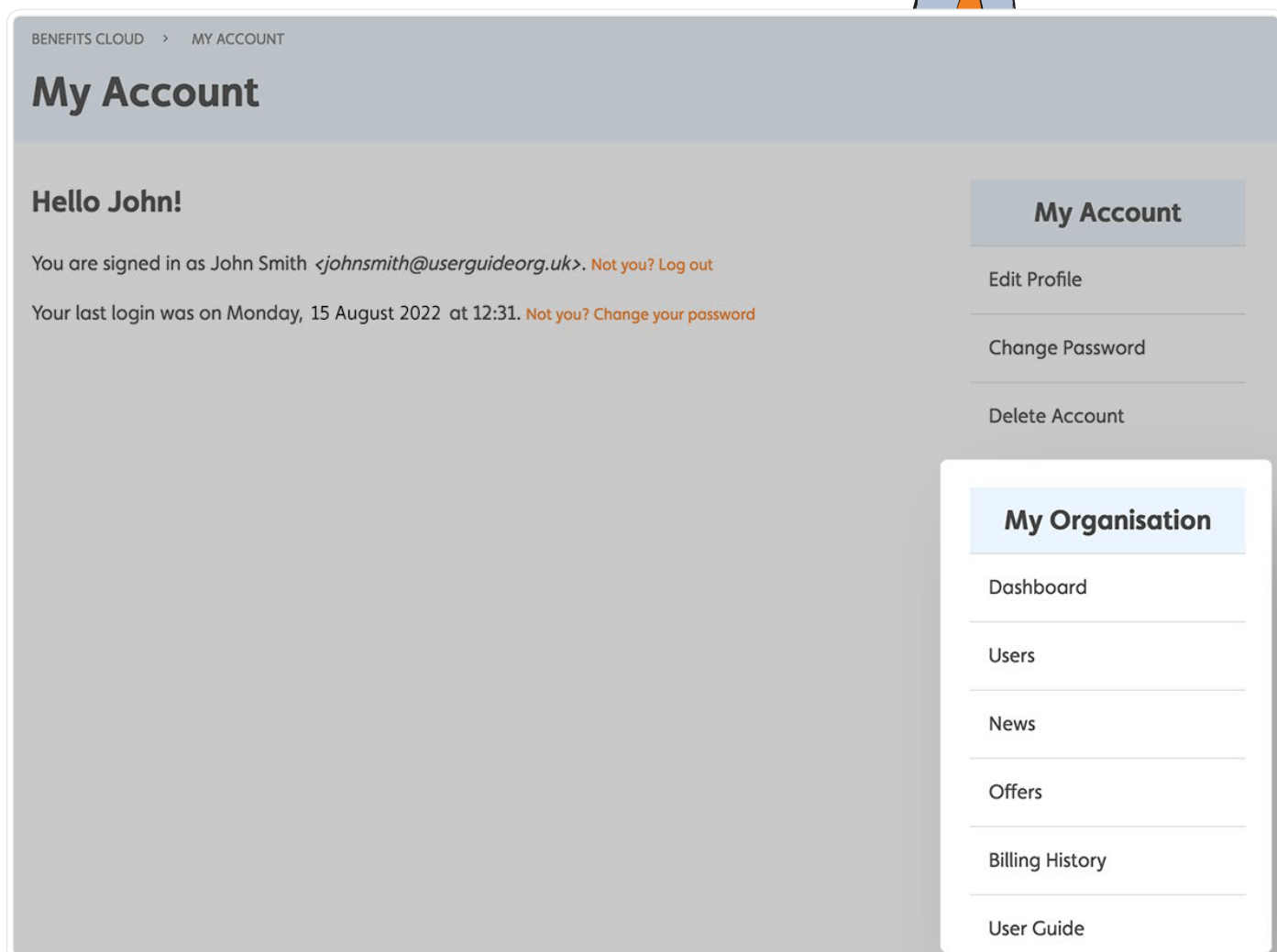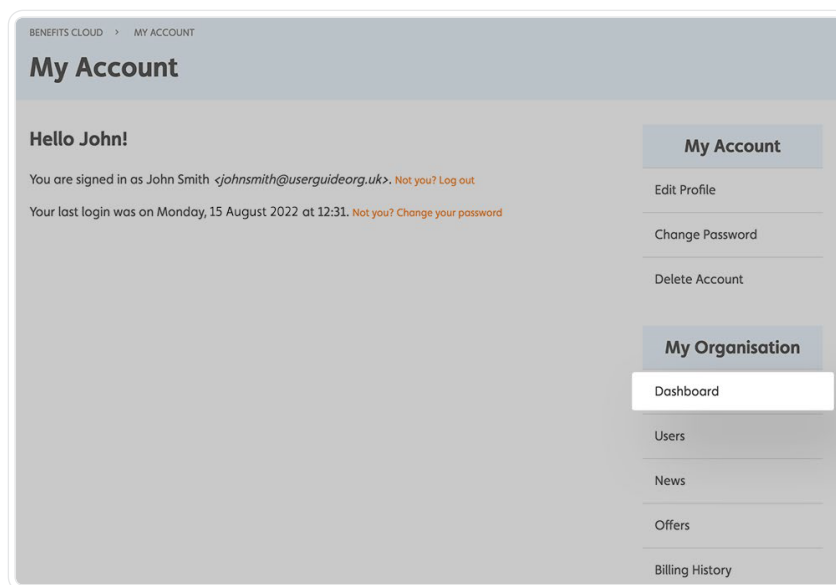Here's a short guide to help you.

Content

Simply select **My Account** from the top right of the homepage and you will see a page as the image below. On the right-hand side is your organisation's **Management Menu**.

2. Dashboard

You can access the **Dashboard** by selecting **Dashboard** from the right-hand menu, as highlighted in the image to the right.

On this page (image below) you can see an overview of how many users you have and how many **News** items, **Own Offers** and **Pinboard Offers** you have posted.

You can also see confirmation of which **Benefits Cloud Plan** you are subscribed to (**Stratus, Nimbus, Cirrus**), your billing status and in addition you can get access to the **Edit Organisation** button to set-up some customisation (see Section 3).
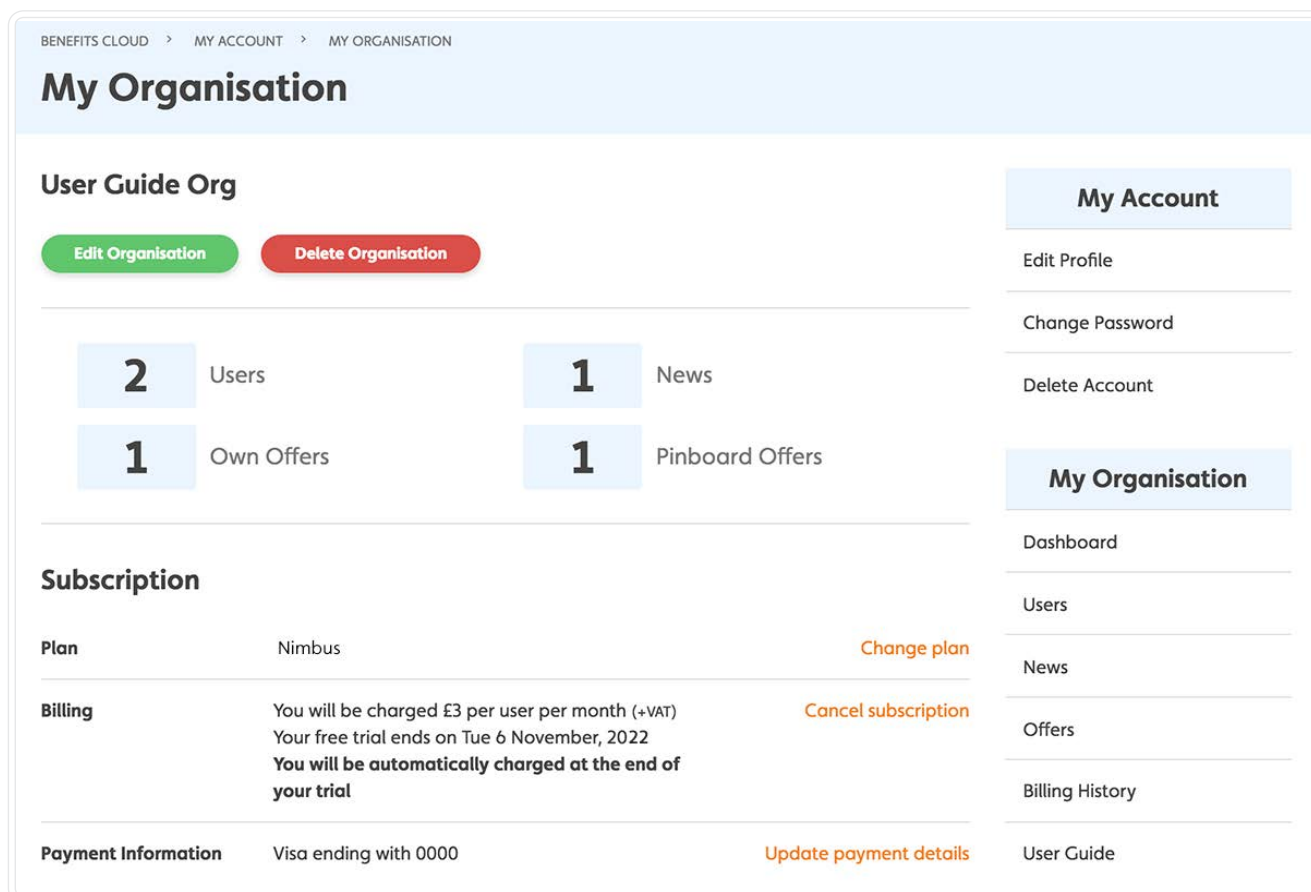
3. Edit your organisation

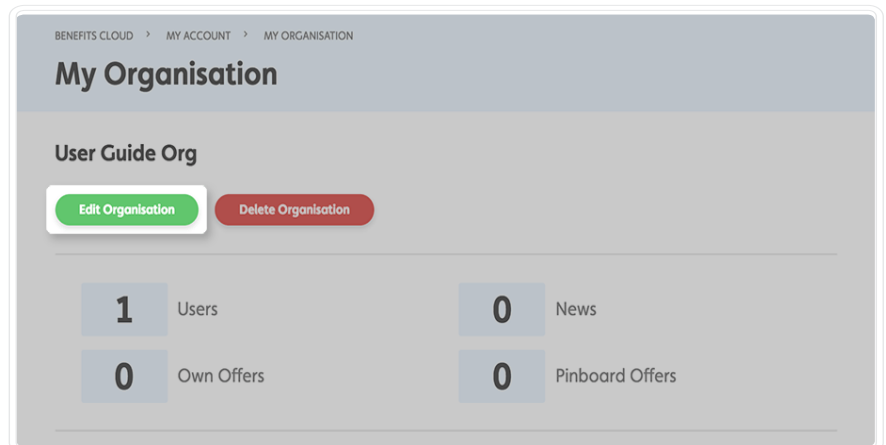To edit your organisation, click the button in the top left corner, as shown in the image to the right.

You can now edit your organisation's **Name** and **Logo**. You can also set the **Primary and Secondary Colour** for your account by selecting a colour with the colour picker and clicking **Choose**.

To add your logo, simply click **Choose File** and upload your logo. To remove a logo, tick the **Delete Image** checkbox. To make any changes take effect you must ensure you click **Save** at the bottom of the page.
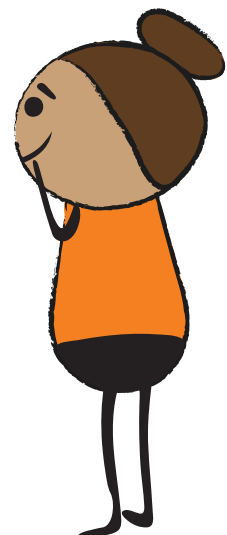
Select **Users** from the **My Organisation** menu and you will see a list of the users currently assigned to your organisation.

From here you can choose to **Add** a user, **Delete** a user that you don't want to continue to have access to Benefits Cloud, or you can choose to **Edit** the user's details.

To **Add Users** click the button in the top right corner of the user list. Add the new user's **Email Address** and, if needed, when you want their access to Benefits Cloud to end by entering an **Expiry Date**.

If you wish to add more than one user, click on the **Add Another** button. When you have added all new users' details, click on the **Send Invitations** button and the new user(s) will receive an invitation by email to activate their account. If they forget their password at any time in the future they can reset it themselves and you will not need to do this for them.

Please Note: You may need to add the address **info@benefitscloud.co.uk** *to your safe senders list to ensure that emails to your users are received.*
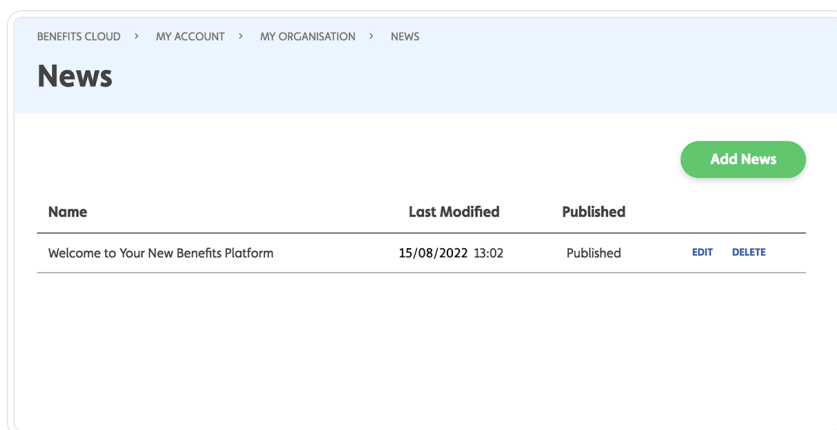
On the **Edit User** page you can update the **Email Address**, amend their **Name** (for example, if an employee gets married) and also amend their **Expiry Date** (for example, if an employee is on a temporary or fixed-term contract).

5. Create, edit and manage news
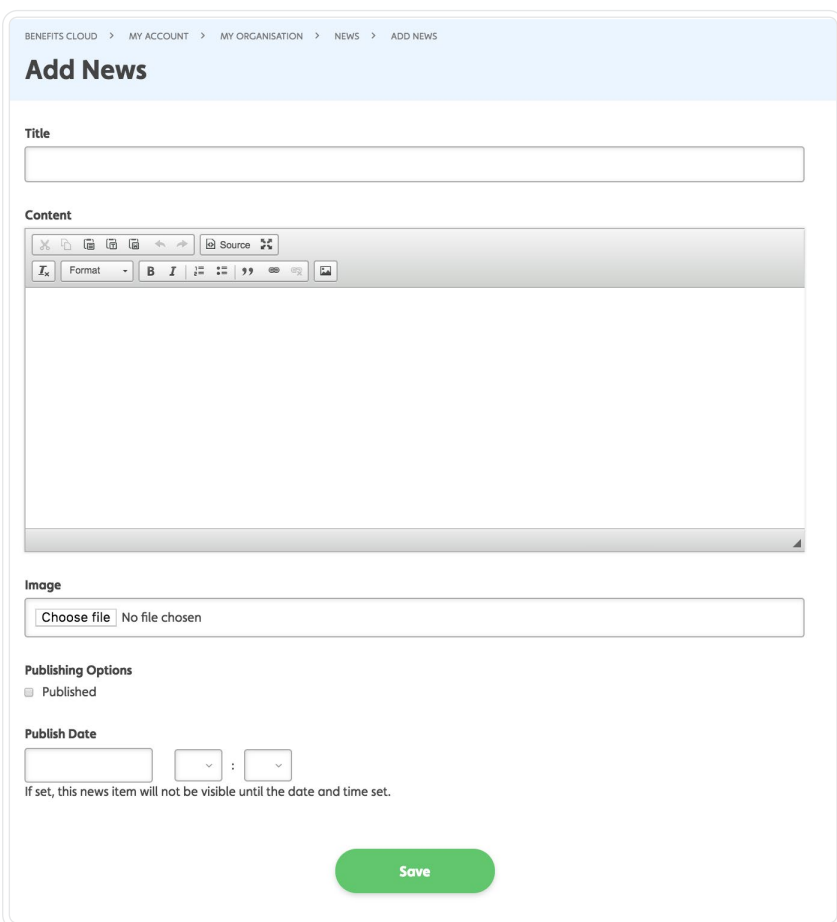
We provide you with the ability to add your own announcements to your organisation's news feed. To manage your news items, click the **News** link in the **My Organisation** menu.

Here you can **Edit**, **Delete** and **Add News** items.

News

Add News

Name	Last Modified	Published		
Welcome to Your New Benefits Platform	15/08/2022 13:02	Published	EDIT	DELETE

Add News

Title

Content

Image

Choose file | No file chosen

Publishing Options
☐ Published

Publish Date

If set, this news item will not be visible until the date and time set.

Save

The image on the left shows the page you see when you **Edit** or **Add** a news item. Here you can enter a **Title**, the **Content** and upload an **Image** by clicking **Choose File**.

You can temporarily remove a news item by unticking the **Published** checkbox.

Should you wish to create a news item that goes live on a future date, you can enter a **Publish Date** and time.

Click **Save** to ensure any changes are reflected on the website.
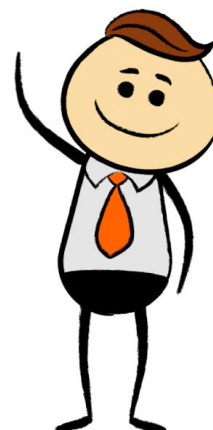
6. Create, edit and manage additional offer

At Benefits Cloud, you are able to add your own offers for your organisation, depending on your plan. There are two types of offers you can add:

- **Pinboard Notice** – This can be used in the same way that an old fashioned cork pinboard on the wall would be used. For example, staff may want to advertise "wanted or for sale" items, they may wish to publicise a charity event or a reminder about the forthcoming Christmas Party.

- **Offers Plus Notice** – This can be used for any other offers that you have negotiated with local suppliers, such as a discount at the local restaurant, sandwich shop or gym.

To manage your offers, click the **Offers** link in the **My Organisation** menu. Here you can **Edit, Delete,** and **Add Offers.**

The image on the left shows the page you see when you click **Edit** or **Add Offer**.

Here you can enter a **Title**, set the **Type** to either **Pinboard Notice** or **Offers Plus Notice** and add/edit the **Content**.

In the **Contact/Claim Information** describe how a user can claim the offer. Add a **Quote/Reference** if one is needed.

We recommend adding an **Image** by clicking the **Choose File** button.

You can choose whether to publish the offer by ticking the **Published** checkbox. To set a time limit on an offer set the **Start Date** and **End Date**.

Click **Save** to ensure any changes are reflected on the website.

7. Upgrade your plan

If you'd like to upgrade or change your plan at any time, go to **My Account** and select your organisation **Dashboard**. From here you can select **Change plan**.

Here it shows your **Current** selected plan (image below) which you can then change by **Selecting** a new plan and confirming it by clicking the **Change** button. On the next page you will be asked for your payment details and once that is confirmed your plan will have been updated.

BENEFITS CLOUD   >   MY ACCOUNT   >   MY ORGANISATION

My Organisation

User Guide Org

Edit Organisation   Delete Organisation

2	Users	1	News
1	Own Offers	1	Pinboard Offers

Subscription

Plan	Nimbus	Change plan
Billing	You will be charged £3 per user per month (+VAT) Your free trial ends on Tue 6 November, 2022 **You will be automatically charged at the end of your trial**	Cancel subscription
Payment Information	Visa ending with 0000	Update payment details

	Stratus	**Nimbus**	**Cirrus**
	Free	£3 PER PERSON PER MONTH	£30 PER PERSON PER MONTH
Own branded benefits portal	✔	✔	✔
Manage and add your users	Unlimited	Unlimited	Unlimited
Access to new offers daily	✔	✔	✔
Add your own locally negotiated offers	✔	✔	✔
Add company news	✔	✔	✔
Use our pin board to share opportunities and local offers	✔	✔	✔
Access premium offers	✘	✔	✔
Access bespoke package of wellbeing benefits	✘	✘	✔
		30-DAY FREE TRIAL	30-DAY FREE TRIAL
	Select	Select	Select

All prices shown are excluding VAT at 20%

8. Upgrade to Nimbus

You can now support users to access premium offers by enabling them to upgrade on an individual basis. They will pay a fee direct to us for the premium access and you don't need to do anything. If you later buy premium access for everyone in your organisation, they can cancel their direct upgrade and continue to access it. They can buy access using their own payment details in their own **My Account** section.

If the user has a discount code available they can use this by entering it in the **Voucher** input and clicking the **Apply** button. If the code is valid, the discount will be automatically calculated and taken off the total amount.

BENEFITS CLOUD › MY ACCOUNT

My Account

Hello Jo!

You are signed in as Jo Smith *<jo@userguide.uk>*. Not you? Log out

Your last login was on Sunday, 14 August 2022 at 20:08. Not you? Change your password

Subscription

Would you like to upgrade to a premium account? Yes please! Upgrade me to Nimbus!

Should you wish to remove a user from your organisation, they might request continued system access so please let us know by emailing us with their details at **gethelp@benefitscloud.co.uk** so that we can make arrangements for them to continue to have access for the remainder of their upgrade period.

BENEFITS CLOUD › MY ACCOUNT › PAYMENT DETAILS

Payment Details

Description	Date	Amount
1 user × Benefits Cloud Nimbus (at £25.00 / year)	August 20, 2022 – August 20, 2023	£25.00
Tax (20%)		£5.00
	Total	**£30.00**

Voucher

[   ] [Apply]

Billing Address

LINE 1 [   ]

LINE 2 [   ]

CITY/TOWN [   ]

COUNTY [   ]

POSTCODE [   ]

Billing Email

[individual@benefitscloud.co.uk]

Cardholder Name

[   ]

Credit/Debit Card (Card Number, Expiry Date and CVC)

[💳 Card number   MM / YY CVC]

Your card details are encrypted and passed securely to our card processing partner Stripe. Benefits Cloud does not store any card details.

My Account

Edit Profile

Change Password

Delete Account

Billing History

[Submit]

9. Making the most of Cirrus benefits

Your **Cirrus benefits** have already been pre-loaded onto **Benefits Cloud** and are immediately available for your employees to use:

24 hour Advice and Information Line

Available for you, your partner and dependent children to receive confidential guidance on medical, legal and domestic issues from experienced counsellors, lawyers and medical advisers.

Elder Care

Advice and information for working families with older dependents, who need to navigate the complexities of the social care system.

Gym Discounts

Gym Discounts provides you with access to discounted gym and digital fitness memberships,along with active lifestyle discounts in order to support your journey to your best health. Save upto 40% on a membership.

Doctorline

You and your partner can call DoctorLine from anywhere in the world, 24/7. An experiences healthcare operator will take your details and arrange a call with a GP at a time that suits you.

Whitecalm

One-stop wellbeing support platform, with content covering all aspects of wellbeing including sleep, nutrition, fitness, mental health and lifestyle.

Annual Financial Health Check

Get a clear understanding of your financial wellness and gain the knowledge to help you make important financial decisions

The Cinema Society

Save up to 40% on cinema tickets for yourself, family and friends at hundreds of cinemas including Cineworld, ODEON, Vue and many others, by buying vouchers from The Cinema Society any time and you can buy as many as you like!

Don't forget to tell us when employees join and leave, so we can ensure new colleagues are given access and those leaving can be removed. A monthly summary of joiners and leavers should be sent to **gethelp@benefitscloud.co.uk**

10. The Cloud Store

The Cloud Store contains some amazing, additional offers that will be of interest to employers as an upgrade to their existing package. To inquire about any of these offers, please complete the details requested and a member of the relevant team will be in touch with further information.

11. Hints and Tips

Here are some helpful hints and tips to help you get the most out of Benefits Cloud!

- Think carefully about how you communicate the launch of your new Benefits Cloud platform to your employees / members.

  If you need any help with pre-launch communication, posters or other tips to help them get the best out of Benefits Cloud, just drop us a line at **gethelp@benefitscloud.co.uk**

- Do encourage your users to set and update their interests via **My Account > Edit Profile** and tick the relevant boxes. This will create a personalised user experience for them and activate their **Offers for You Dashboard** on the homepage.

- Ensure you keep your list of **Users** up-to-date.

Have Fun Using

benefits cloud