

Aurenza
CONSULTING

AURENZA PORTAL

Admin user guide

Set up your sales team, review outreach results and move signed opportunities into delivery.

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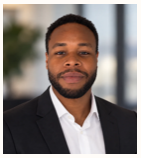
Sign in to the portal ↗

Try the sample workspace ↗

YOUR AURENZA TEAM



Ivan Nlondock
Head of Product

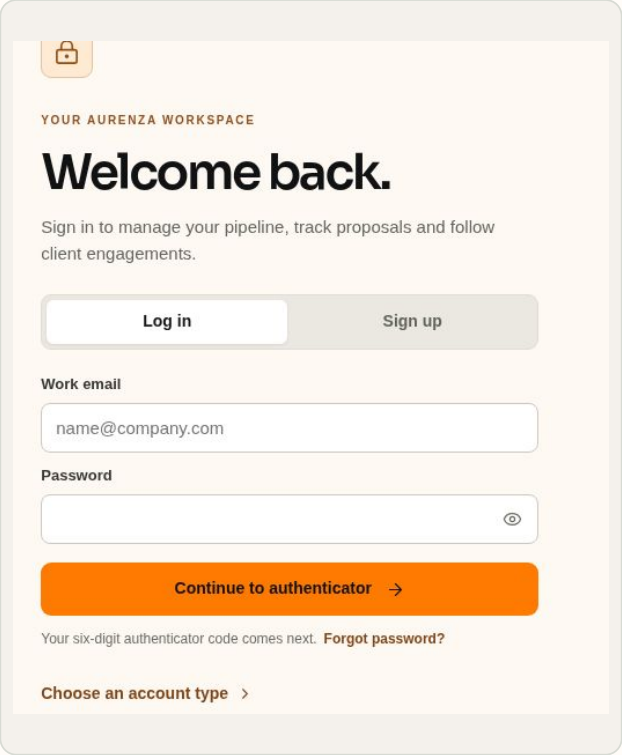


Ausar McGruder
Head of Sales

GETTING STARTED

Sign in and find your guide

On your first verified sign-in, the portal offers a walkthrough for your account type. You can replay it from User guide whenever you need it.



Sign-in screen on the portal domain.

1. Choose your entry point

Returning users select Log in. For a new account, select Sign up and choose your role. Use the private setup code issued for your approved email.

2. Verify with your authenticator

Enter your portal password. At first enrollment, scan the QR code in your authenticator app and enter its six-digit code. Save your recovery codes privately.

3. Open the walkthrough

Select Start walkthrough to visit your role's tabs. Use Next step or Back to move through it. If you skip it, open User guide in the sidebar to restart.

If you need help with your password

Select Forgot password? and enter your password recovery key or an admin-issued reset code. Six-digit authenticator codes are used after the password step. Keep both types of recovery information private.

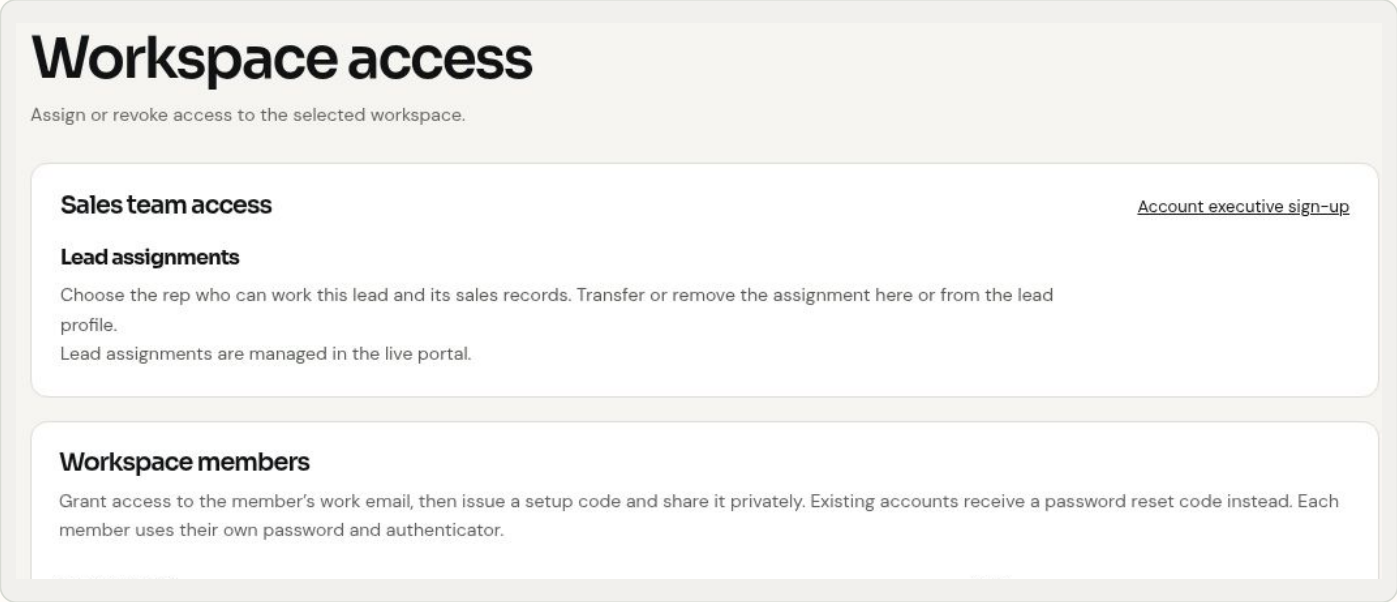
Open user guide ↗ | Open password recovery ↗

To revisit an announcement, open User guide and select View update under What's new.

WORKSPACE ACCESS

Assign an account to a rep

Start in the internal Aurenza workspace. A rep needs approved access and a lead assignment before they can work a live account.



Workspace access in the demo. Assignment controls appear in the live workspace.

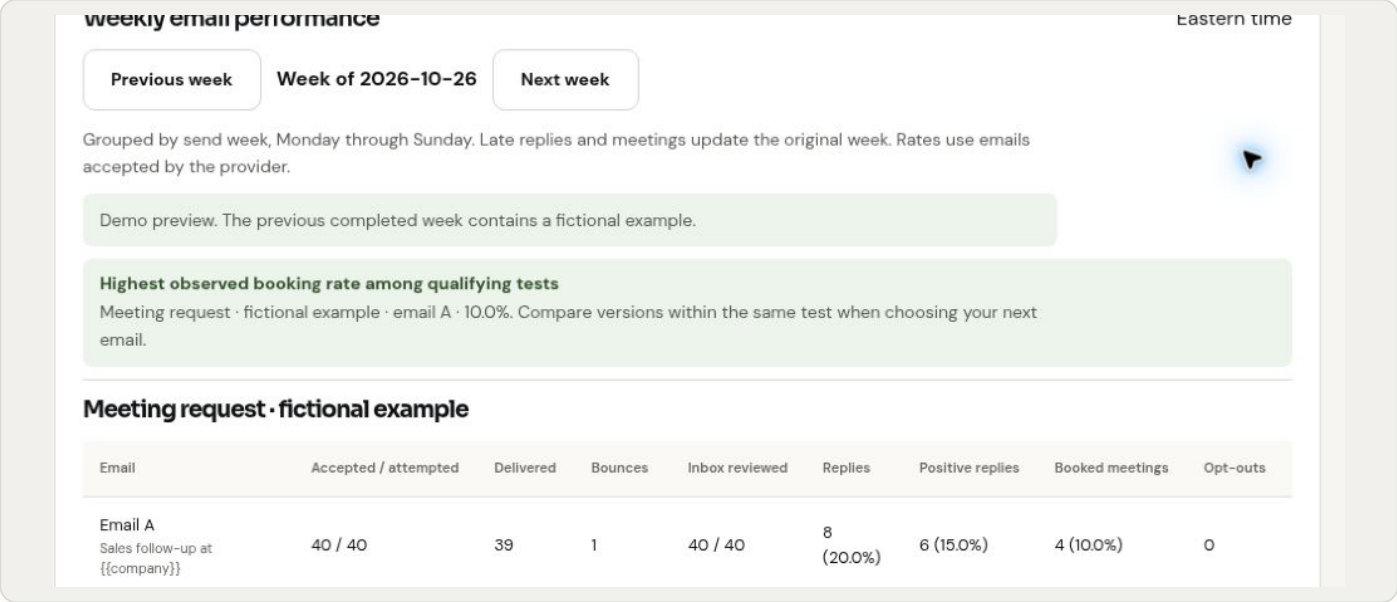
Approve the rep	In Workspace access, open Sales team access and review pending requests. Check the email and approve the person who should join your sales team.
Assign the lead	Under Lead assignments, select the lead, choose the account executive and save the assignment. The same control is available from the lead profile.
Check the handoff to sales	Ask the rep to open My leads, then Assigned leads. Revisit the assignment here if ownership changes.

Open workspace access ↗ Open all leads ↗

CAMPAIGN REPORTS

Review an email split test

Use the weekly report to decide which email to test next. Replies and booked meetings tell you more about buyer interest than send volume alone.



A completed demo week. The figures are fictional and illustrate how to read the report.

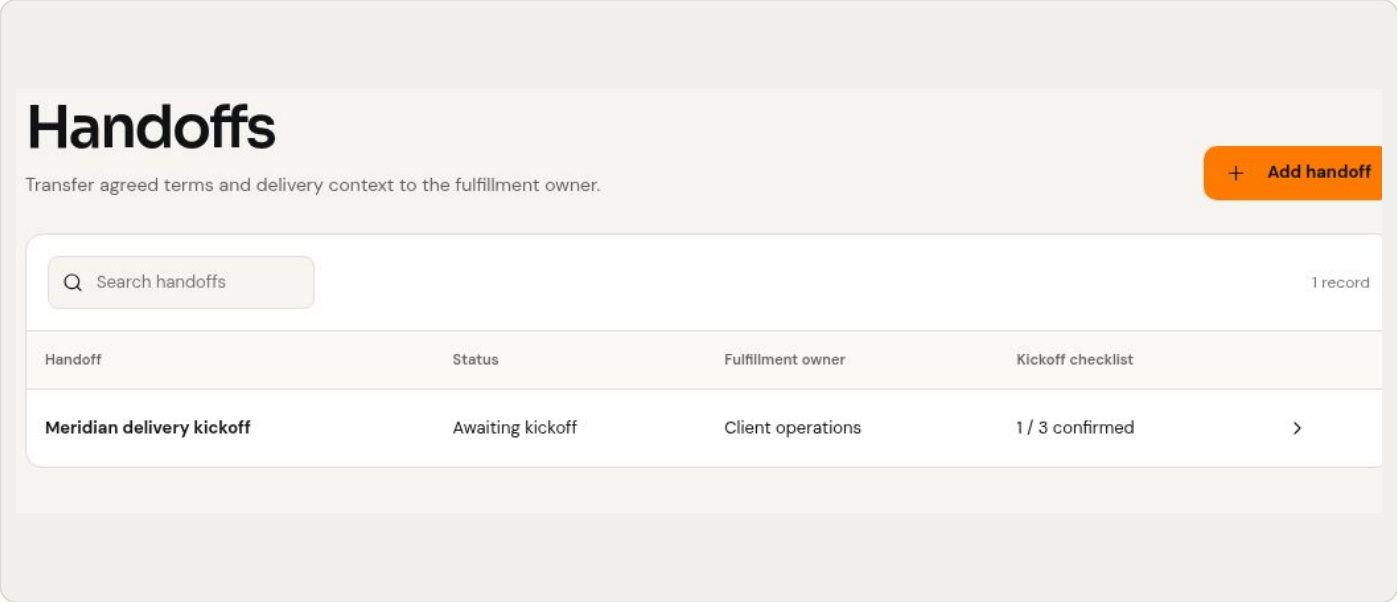
Choose the reporting week	Open Outreach, then Campaign reports. Use Previous week or Next week to select the send week you want to review.
Compare the two emails	Check accepted volume, replies, positive replies and booked meetings for each variant. If few messages were accepted, collect more evidence before choosing a winner.
Plan the next test	Read the recommendation. In Campaigns, prepare the next pair of emails and change one element, such as the meeting request. Review verified contact details and outreach permission before enrollment.

Open campaign reports ↗ Open campaigns ↗

CLIENT OPERATIONS

Move a signed deal to delivery

Keep the terms agreed in sales with the people who will deliver the work. Use product feedback from discovery to inform the roadmap.



The Handoffs list shows the fulfillment owner and checklist progress for each signed deal.

Check the commercial record	In Quote register, review the linked opportunity, latest revision, amount and decision. Confirm the signed terms before setting up delivery.
Brief the delivery owner	Open the matching handoff. Review commercial commitments, required inputs and the fulfillment owner. Share approved kickoff material in Documents.
Route product feedback	Capture buyer needs in the Discovery call register. Review related evidence in Market research and record a decision in Improvement roadmap.

Open handoffs ↗ | Open quote register ↗ | Open roadmap ↗