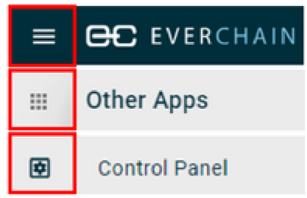
Type: Platform Admin Access

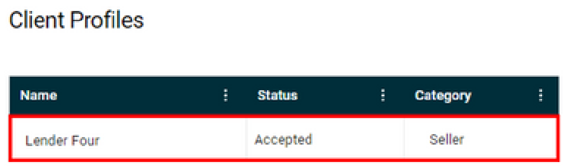
Feature Description: Adding, Enabling/Disabling end-users and setting access level permissions on the platform.

1. From the “3 lines” icon in top left corner,

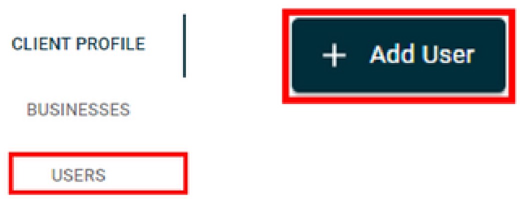
- Click “**Other Apps**” grid icon
- Click “**Control Panel**” squared-gear icon



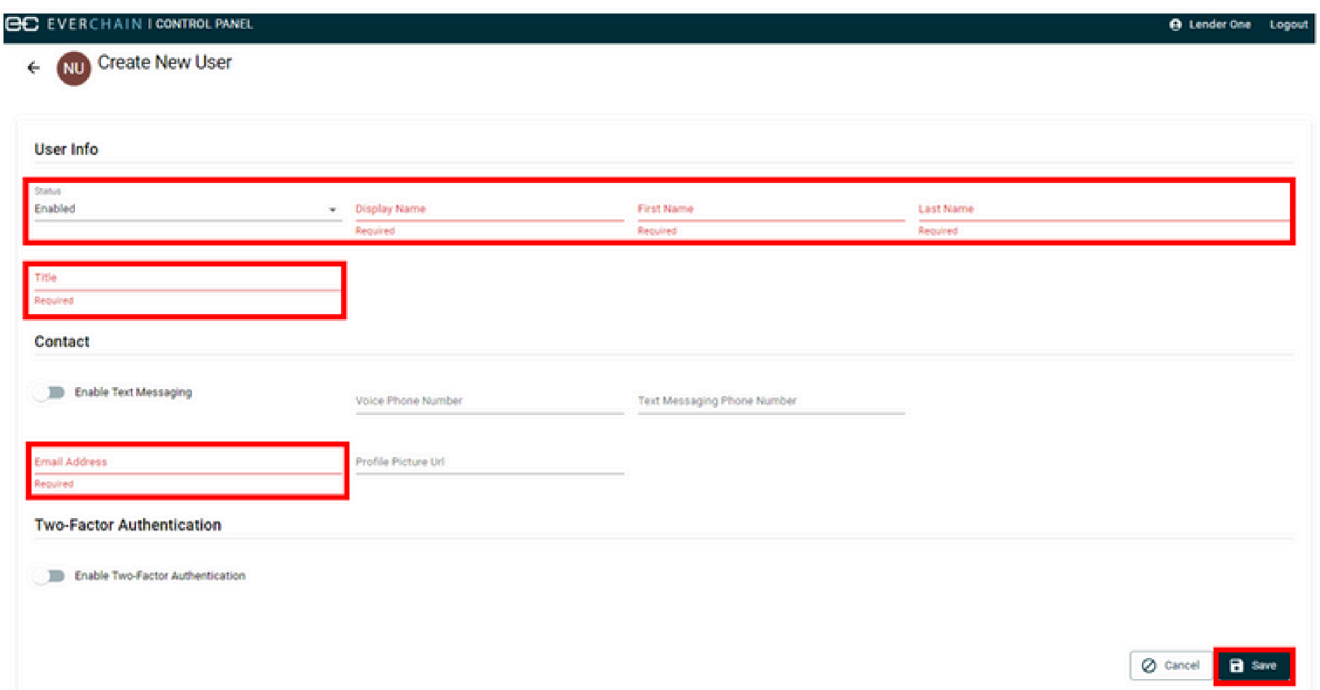
2. Click on the business entity (Lender Four in the example shown here)
NOTE: Status must be in “**Accepted**” which is completed on EverChain’s end.



3. Select “**Users**” then click “**Add User**”

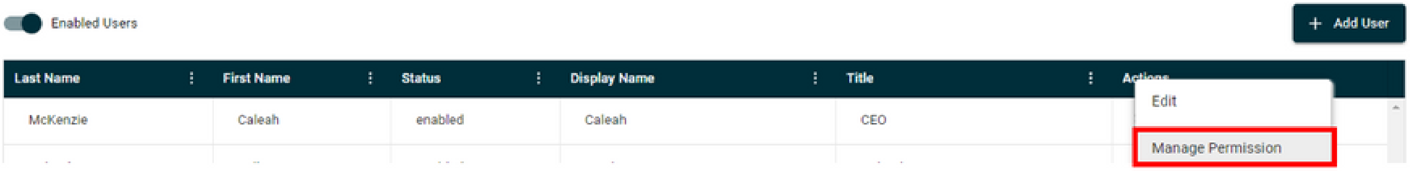


4. In the User Info section, click the Status drop-down and select **Enabled**, then enter the required information: **Display Name, First Name, Last Name, Title, and Email Address**. And finally, click **Save**.



The following notification will appear, confirming that the user was successfully created.

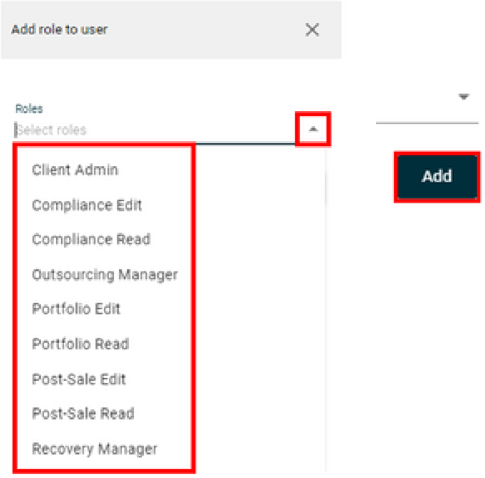
5. Next, on the newly created user, click the 3 dots under "**Action**" and then "**Manage Permissions**".



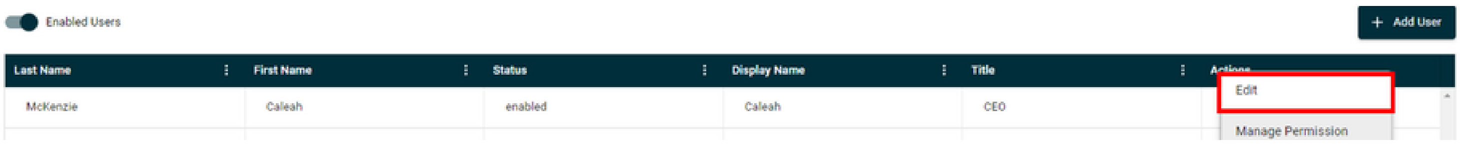
6. Select role(s) to allow user's profile access to that section of the platform and click add.

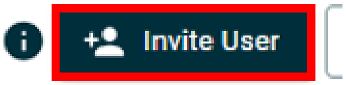
Role options:

- **Client Admin:** Administrative Access
- **Compliance:** Consumer Complaint Manager
- **Outsourcing Manager:** Agency Assignment Manager
- **Portfolio:** Loading Portfolio / Bid Reviewing / Buyer Selection
- **Post-Sale:** Post-Sale Request Manager
- **Recovery Manager:** Debt Sale Manager



7. Lastly, return to platform user list, and under "**Actions**" click the 3 dots, then select "**Edit**". Next, click the "**Invite User**" button to send a platform profile registration email to the newly added user.





Note:
Once a role has been assigned to a user profile, access can be limited to specific functions within the role. This can be done with each user role on the platform.

For example, if given Portfolio Manager access, the user could be given access to load a portfolio to the platform but not have authorization to accept a Buyer's bid.

Once the permission is changed, a notification confirms that the action was successful.