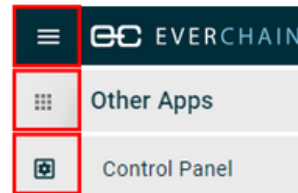


Type: Platform Admin Access

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

- From the "3 lines" icon in top left corner,
 - Click "**Other Apps**" grid icon
 - Click "**Control Panel**" squared-gear icon



- 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.

Client Profiles

Name	Status	Category
Lender Four	Accepted	Seller

- Select "**Users**" then click "**Add User**"



- 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**.

EVERCHAIN | CONTROL PANEL Lender One Logout

← NU Create New User

User Info

Status
Enabled

Display Name
Required

First Name
Required

Last Name
Required

Title
Required

Contact

☐ Enable Text Messaging

Voice Phone Number

Text Messaging Phone Number

Email Address
Required

Profile Picture Url

Two-Factor Authentication

☐ Enable Two-Factor Authentication

Cancel

Save

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



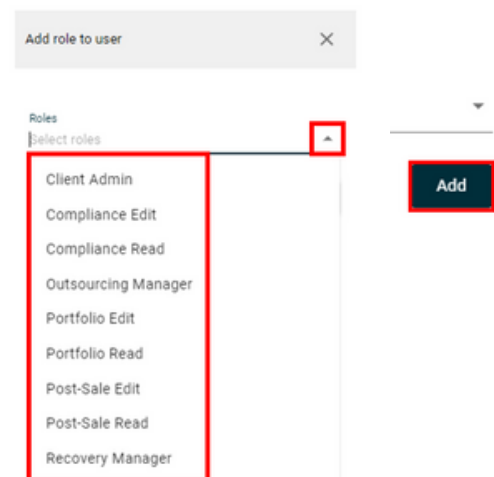
5. Next, on the newly created user, click the 3 dots under “**Action**” and then “**Manage Permissions**”.



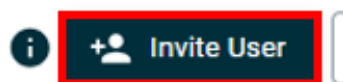
6. Select role(s) to allow user’s profile access to that section of the platform and click add.

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.

The screenshot displays the Everchain Control Panel interface. At the top, a notification bar indicates "Accept Bid" permission updated successfully. The main header shows the user "Caleah" (Lender Four) and navigation links for "PERMISSIONS" and "ROLES". The "PERMISSIONS" tab is active, showing a list of permissions categorized by function: Marketplace, Basic, Forward-Flow, Buyer Compliance Overview, Workflows, and Post-Sale. The "Accept Bid" permission under the "Basic" category is highlighted with a red box, showing it is currently set to "Deny".

Category	Permission	Current Status
Marketplace	Marketplace	Allow (inherited)
Basic	Upload Portfolio	Allow (inherited)
	Submit Portfolio Scrub	Allow (inherited)
	List Portfolio	Allow (inherited)
	Accept Bid	Deny
	Confirm Portfolio Funding	Allow (inherited)
	Download Portfolio Files (PFI)	Allow (inherited)
	Download Portfolio Files (Non PFI)	Allow (inherited)
	Upload Media Files	Not Set
	Access to Portfolio Deck	Not Set
	Access to Digital Seller Survey	Not Set
Forward-Flow	Forward-Flow	Allow (inherited)
Buyer Compliance Overview	Open Buyer Compliance Overview (BCO)	Allow (inherited)
	Buyer Compliance Overview	Allow (inherited)
Workflows	Access to PSA Workflow	Allow (inherited)
	Access to BOS Workflow	Allow (inherited)
Post-Sale	Create Post-Sale Request	Not Set
	Accept/Reject Post-Sale Request	Not Set
	Attach File to Post-Sale Request	Not Set