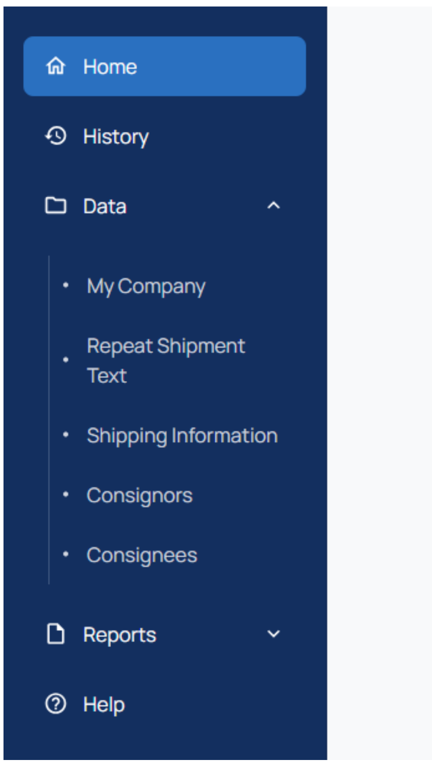
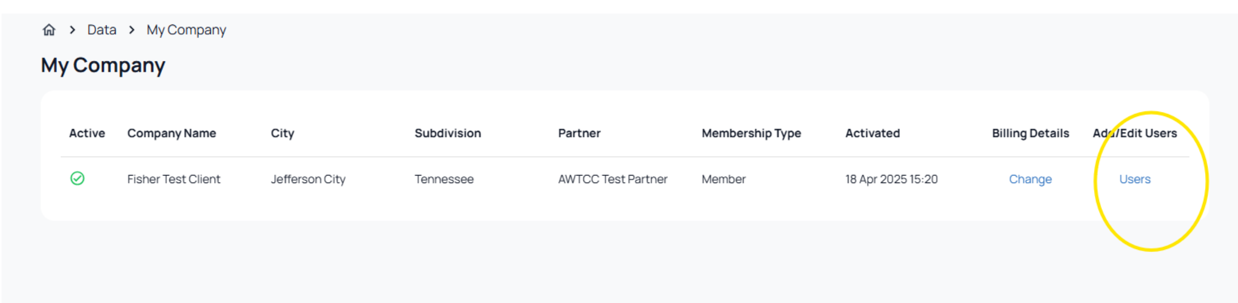
Adding Users Guide

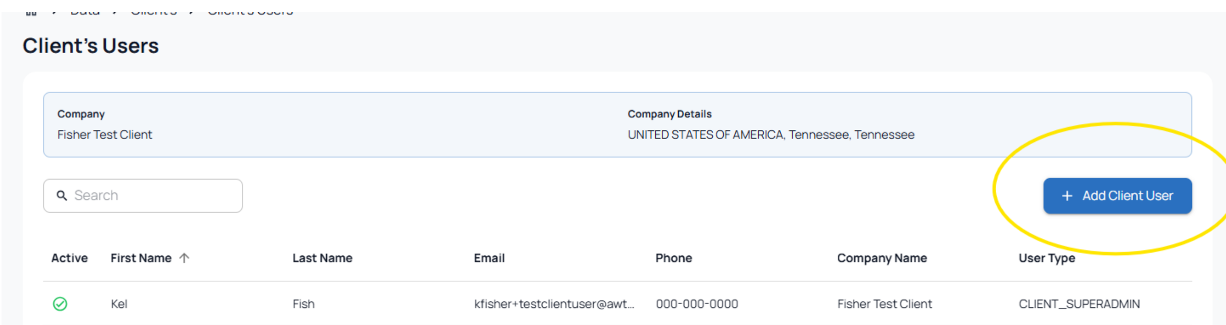
Step 1. Select Data > My Company



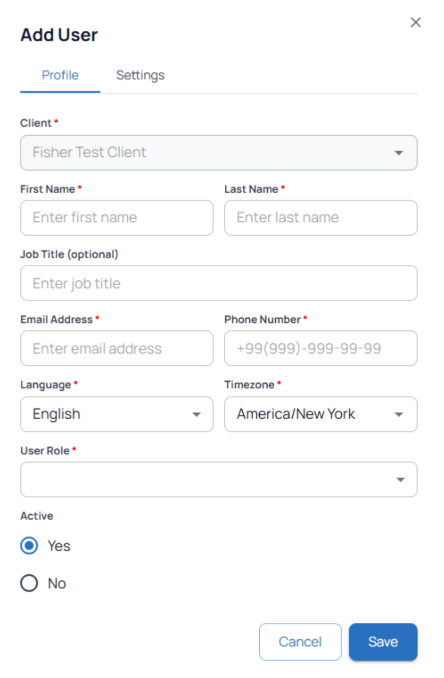
Step 2. Select Users Link



Step 3. Select + Add Client User



Step 4. Input Required Info > Save



Three levels of Client Users are:

SuperAdmin – Grants access to add users and manager payment methods for the company account. Usually assigned to a manager or designated team member responsible for overseeing the user list and saved payment information. Able to submit applications for certificates. Access to all History, draft and active documents.

Client Admin – Permitted to submit applications for certificates. Access to all History, draft and active documents.

Client View Only - Limited to View Only access for History and draft/active documents.

Additional Note: There can be multiple SuperAdmins on the account.