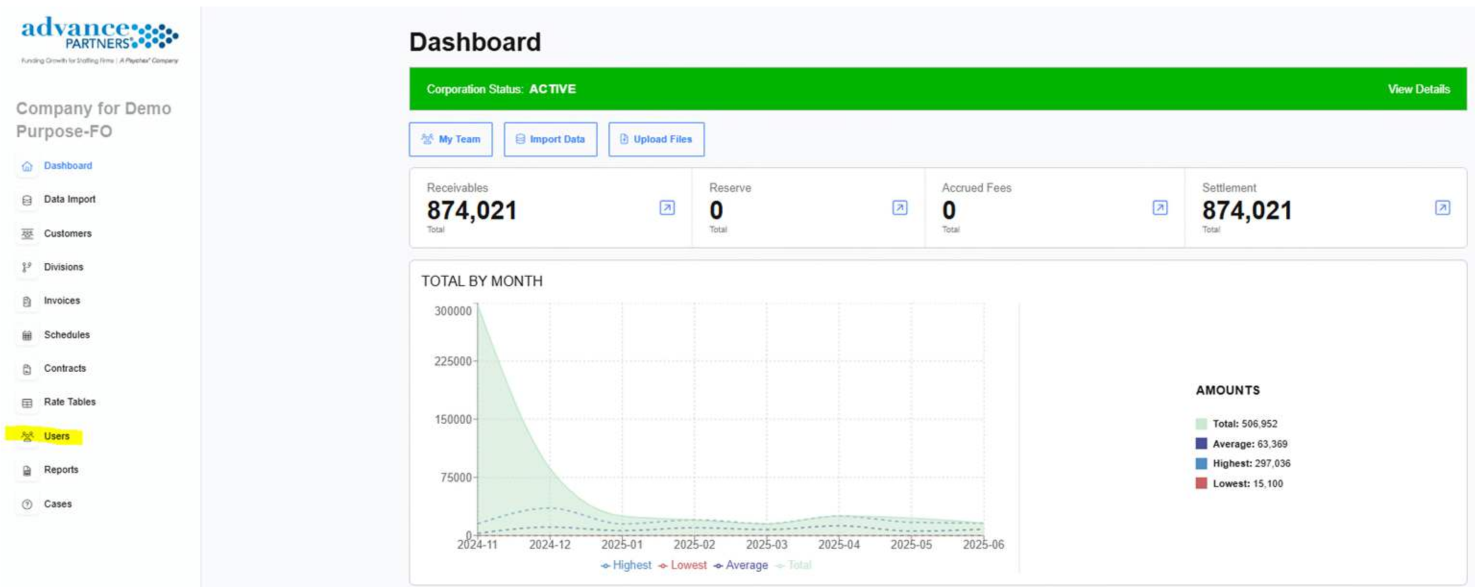
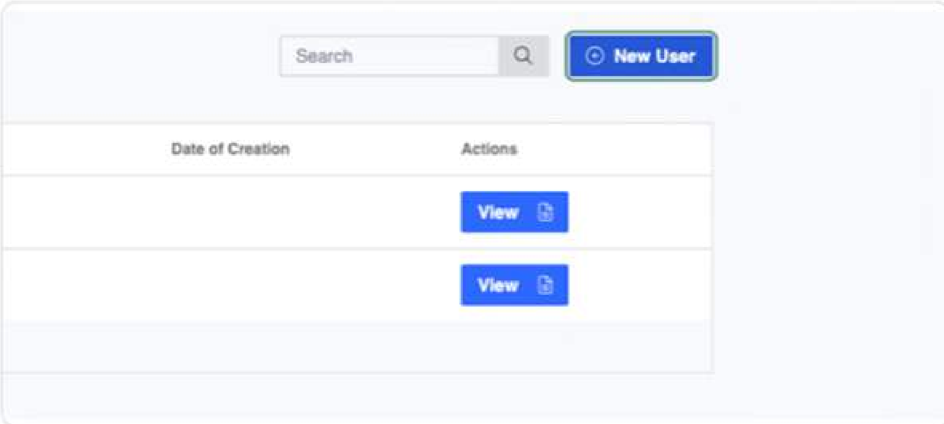
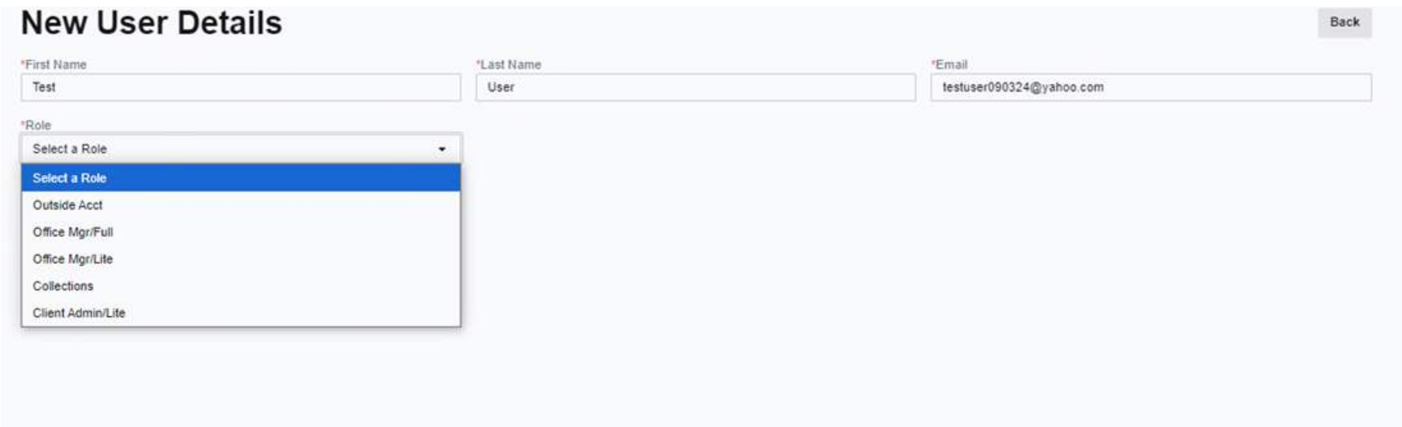
How to Setup/Change Users in Client Portal



From the Dashboard
Click Users

Click on New User





First Name
Last Name
Company email address
Select Role

Note the following chart will allow you to determine which role you would like the new user to have.

	Client Admin/Full	Outside Acct	Office Mgr/Full	Office Mgr/Lite	Collections	Client Admin/Lite
View Debtors	✓	✓	✓	✓	✓	✓
Create Contacts	✓					✓
View Contacts	✓	✓	✓	✓	✓	✓
Delete Contacts	✓					
View Rate Tables	✓					✓
View Branches	✓					✓
View Invoices	✓	✓	✓	✓	✓	✓
Create Invoices	✓		✓	✓		✓
View Invoice Adjustments	✓	✓	✓	✓	✓	✓
Create Invoice Adjustments	✓		✓	✓	✓	✓
View Schedules	✓	✓	✓	✓	✓	✓
View Chargebacks	✓	✓	✓	✓	✓	✓
View Chargeback List	✓	✓	✓	✓	✓	✓
View Payments	✓	✓	✓	✓	✓	✓
View Credits	✓	✓	✓	✓	✓	✓
View Reserves	✓	✓	✓			✓
View Weekly Funding	✓	✓	✓	✓		✓
View Cases	✓	✓	✓	✓	✓	✓
Create Cases	✓	✓	✓	✓	✓	✓
REPORTING						
Aging	✓	✓	✓	✓	✓	✓
Collections	✓	✓	✓	✓	✓	✓
Purchases/ Advances	✓	✓	✓	✓		✓
Reserve	✓	✓	✓	✓		✓
Fee	✓	✓	✓			✓
Net Out	✓	✓	✓			✓
Settlement KPI	✓		✓			
Total By Month KPI	✓		✓			
Top Schedule KPI	✓		✓			
Top Debtors KPI	✓		✓			

Click Submit

The User will receive an email asking them to “Verify Your Account”

Verify Your Account

Your account information

Account	testuser@gmail.com
Verify Link	https://ap-icp-auth-clt-dev.us.auth0.com/u/email-verification?ticket=UvgbVhzFJ83b8JTS78W1nk2pwzmUi5FG#

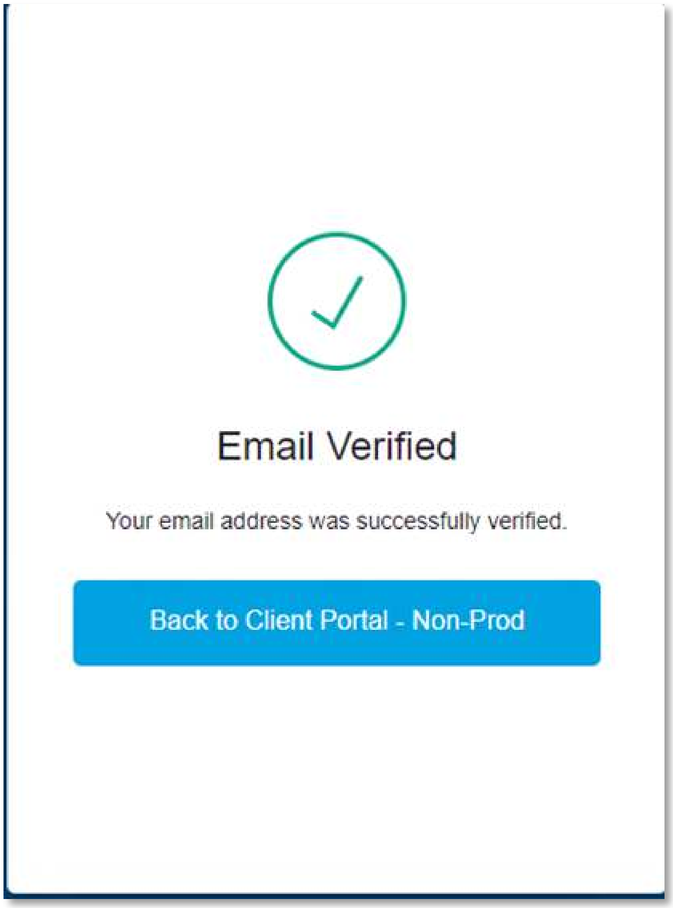
VERIFY YOUR ACCOUNT

If you are having any issues with your account, please don't hesitate to contact us by replying to this mail.

Thanks!

The user will click the Verify Your Account button in the email

The user will receive a message that the email was verified.



Click Back to Client Portal