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Client facing brokers or bankers

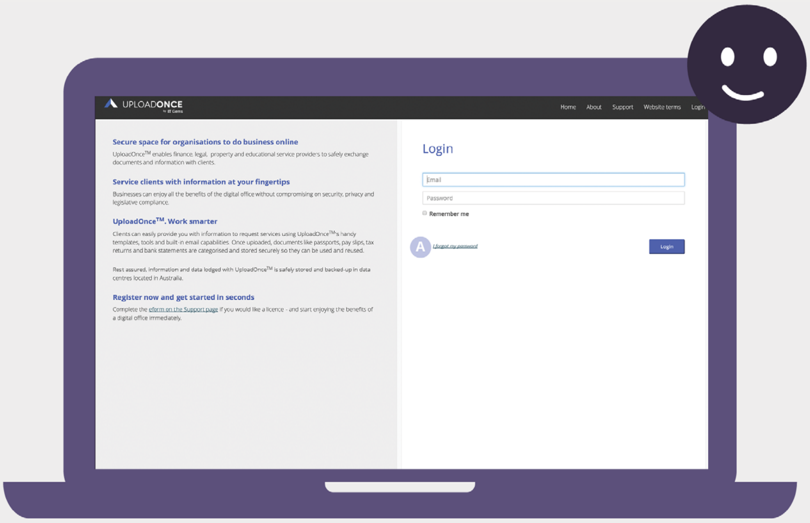
Service Provider Admin

Service Provider Admin

In this role, you manage workflows and add company wide templates
To request documents or complete tasks on a document request, you must switch to the Service Provider profile.

Setting up

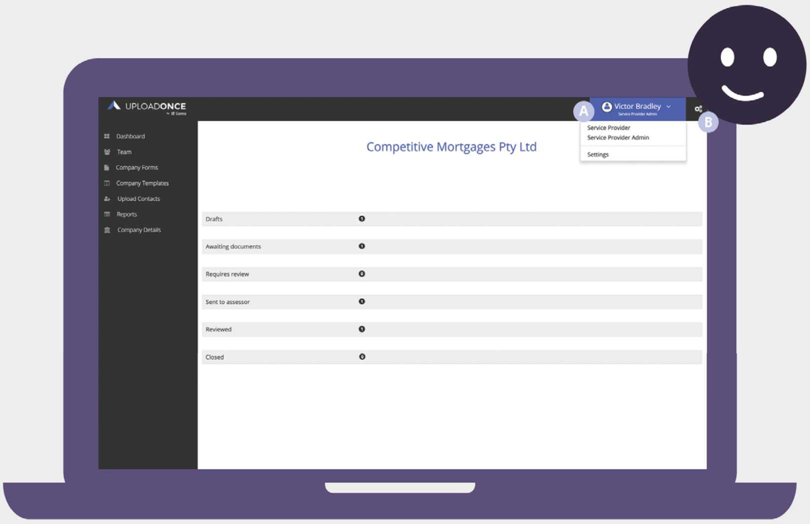
Initial Login



A
When signing in for the first time, enter your email address in the Email field, then click ***I forgot my password***.
If the welcome email does not arrive within 10 minutes, check your spam folder

Switching profiles

Your profile determines the information you see and your level of access. It will always default to Service Provider. The Administrator profile manages workflows and add company wide templates.

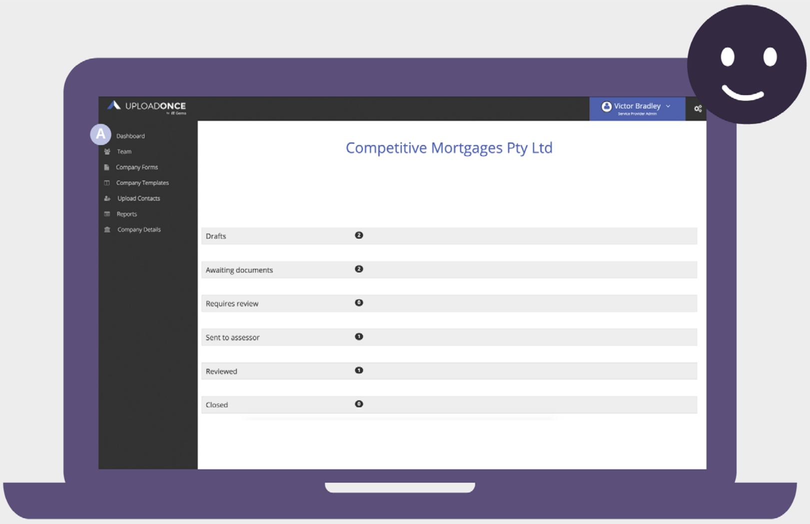


A
To switch profiles, go to top menu and click on your name.

B
To access more profiles, go to the **Support** page to log a request.

Dashboard

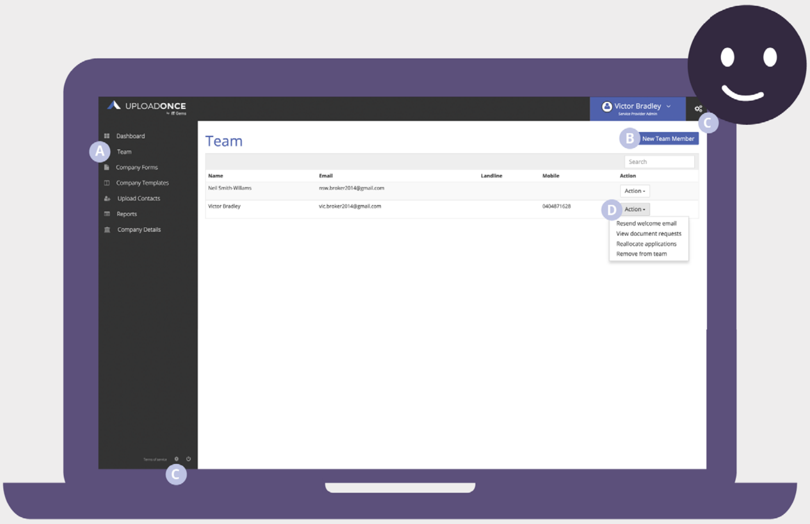
Each profile has a dashboard relevant to their role.



A To see the Dashboard, go to left menu and select **Dashboard**.

Teams

As the administrator, you can add or remove people to the organisation and allocate or reallocate work.



A From the left hand menu, select **Add Team** The Service Provider profile is given to any person who can progress or work on a request.

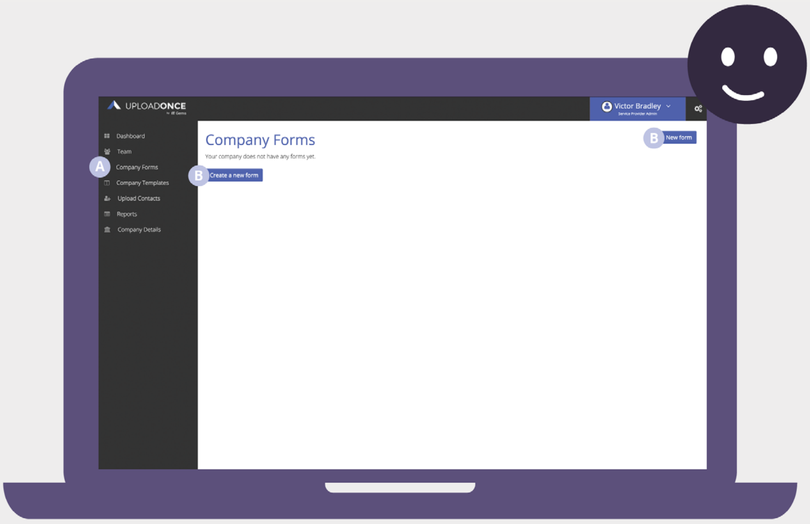
B To add people to your organisation, from top left, select **Add Team Member**.

C To grant another person with Administrator access, go to the **Support** page and submit a **Support Request**.

D To reallocate work or delete a team member if they leave, go to **Action**. If you delete a team member, you will be prompted to reallocate their work.

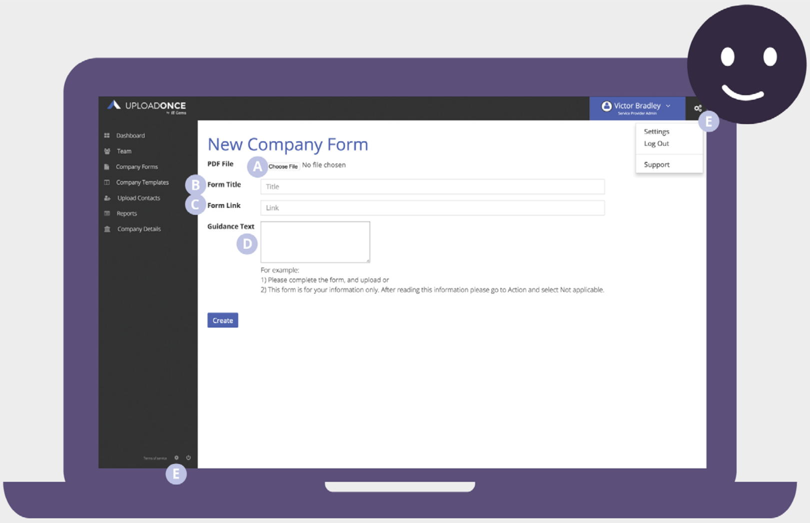
Company Forms

The Administrator can add an organisation's forms or links to webpages so they appear as drop down items on document requests accessible by everyone in an organisation. Links prevent inconsistencies if the organisation already has online forms, guides or terms of service.



A To view a list of all company forms, from the left hand menu select **Company Forms**.

B To add forms or links to the drop down menu for Service Providers to choose from, click **Create new form**.



A — Use this field to have a pdf document appear in the Document Request drop down menu.

B — This is the title of the form or link.

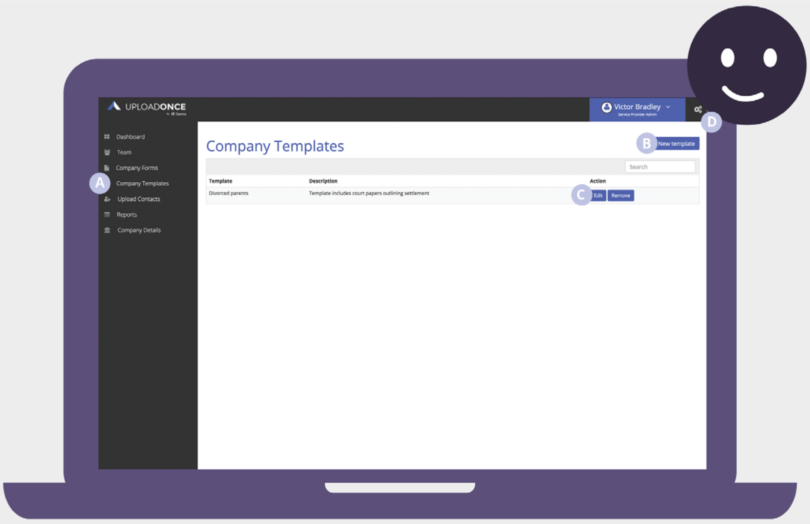
C — Use this field to have a link to a webpage appear in the Document Request drop down menu.

D — The guidance text is visible to the client. Outline instructions for the client on what they should do with this item for example, Sign and Upload, or for your information only.

E — To delete a form, go to the **Support** page and submit a **Support request**. This prevents forms being accidentally deleted as others across your organisation may require these forms or links.

Templates

Add and tailor templates to fast track the document request process for your team.

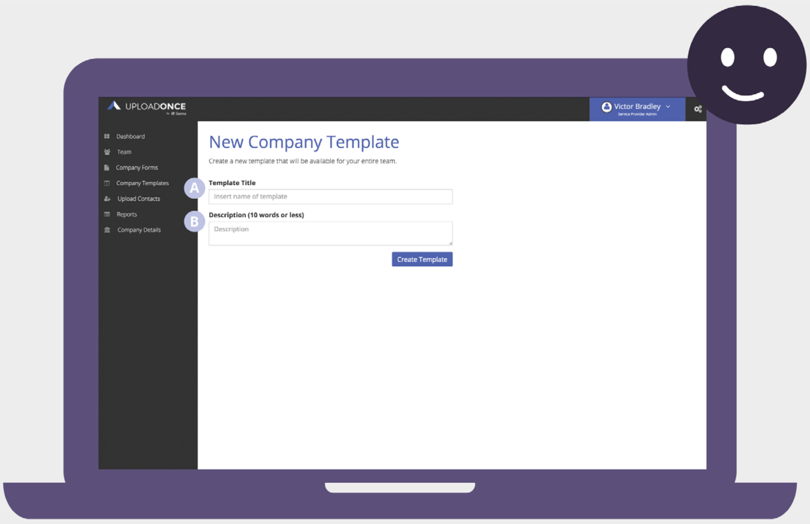


A — To view all templates, from the left hand menu select **Company Templates** and follow the prompts.

B — To create a new template, from the top right click **New template**.

C — Once a template is added, you can edit the template.

D — To delete a company template, go to the **Support** page to log a **Support request**. This prevents templates being accidentally deleted.

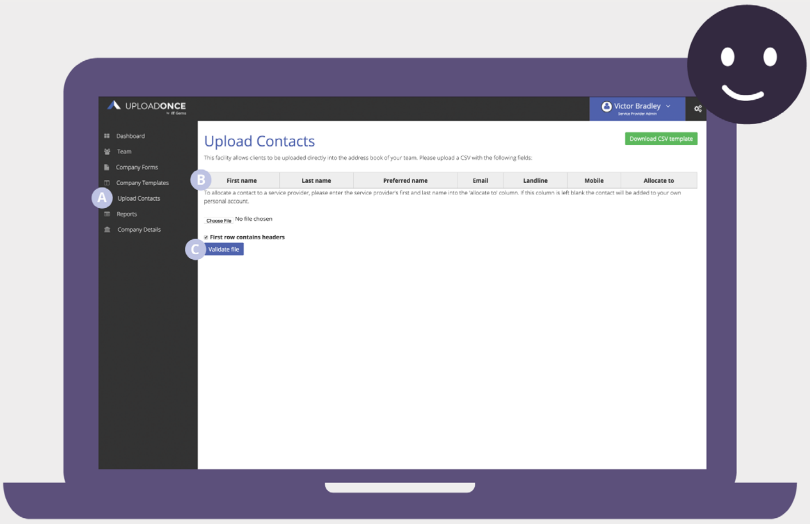


A — Add a title to make it easy for your team to choose the right template.

B — Description are notes for Administrators about the template's purpose and versioning. For example created in 2015 or template expires 1 Jan 2016 and needs to be removed by 31 Dec.

Upload Contacts

Only the Administrator can bulk upload contacts to the private address book of each Service Provider.



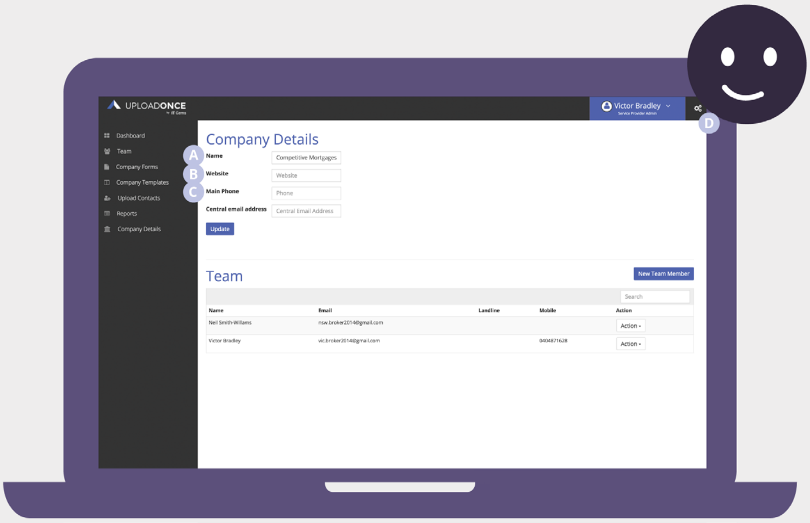
A To bulk upload Contacts, go to the top left and select **Upload Contact**. This provides a csv file to paste contact information.

B These are the fields which will appear in the CSV file.

C To bulk upload contacts, click **Validate File** button. If the one client is working with two service providers in your organisation e.g. the accountant and the mortgage broker, add the contact in twice.

Company Details

Insert details to ensure your organisation's details appear consistently in communications.



A Insert your company name as you would like it to appear in communications with all clients.

B Include a landing page on your website. For example, link to the 'contact us' page.

C Insert a general number for all clients to contact you if this is applicable.

D If you would like any additional information, contact **Support**. The company details can be tailored upon request.