Whitespace Platform Roles and Permissions for Broker Users

User roles on the Whitespace Platform are assigned/managed via the 'Users' tab of the administration portal.

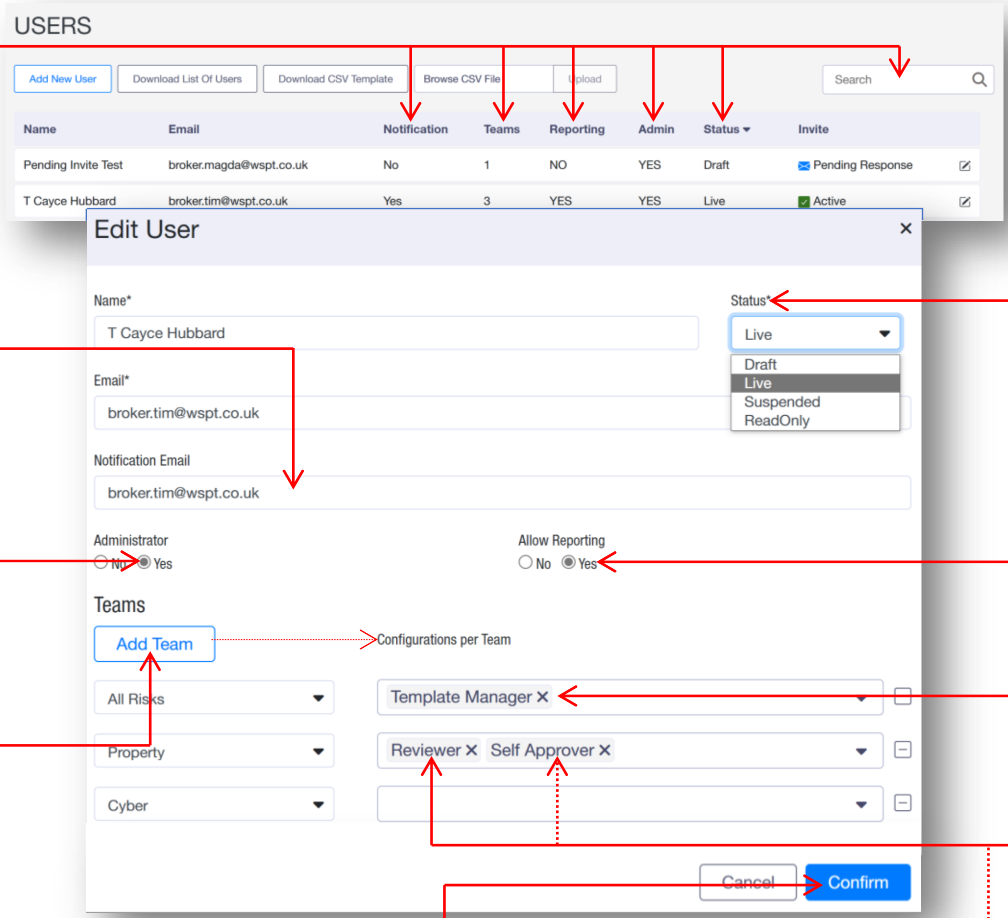
Roles that apply across the whole platform – whether email **notification** is enabled, number of **teams** joined, MI **reporting** and **admin**istrator permissions, and **status** of user account – are summarised on the main users tab alongside the user's name and email. Type in the search box to filter by user name/email, and click on a line to edit that user.

To enable email notifications for significant events on the platform, enter an email address in the user's '**Notification Email**' box.

Toggle the '**Administrator**' radio button to '*Yes*' to give the user access to the admin portal. Admin permission extends to the whole corporate account, not just to an administrator's teams. To create a dedicated administrator-only account, set the user status to '*ReadOnly*' and do not assign any teams.

Each contract and template on the Whitespace Platform is associated with a single user team. Users can be added to as many teams as needed. Click '**Add Team**' and select an available team from the blank dropdown that appears as a new entry in the Teams list.

User permissions for each team are shown to the right of the team name. Click on the drop-down configurations box to add a permission, or click on the '*x*' after a permission to remove it.



PLEASE NOTE that some role and permission changes may incur charges. Please contact hello@whitespace.co.uk for more information.

'**Status**' determines the user's level of access to the Platform.

- Users who are still being set up can be set to '*Draft*'. They cannot access the platform.
- '*Live*' users have full platform access.
- '*Suspended*' users cannot access the platform and are hidden from other users. To request deletion of a user, set them to 'Suspended' and notify support.
- '*ReadOnly*' users can access the platform and read and export their teams' contracts and attachments, but they cannot make changes or conduct any business.

Toggle the '**Allow Reporting**' radio button to '*Yes*' to give the user permission to create new MI Reports for the teams that they are a member of.

The '**Template Manager**' team permission allows a broker to create, lock, unlock, and edit templates for that team. Please note that all users can clone their teams' templates as new contracts.

'**Reviewer**' permission allows the user to assess contracts sent for Internal Review and authorise/deny progress to the next stage.

'Reviewer' users with the additional '**Self Approver**' permission can authorise their own contracts. Only reviewers can have self-approver status.

PLEASE NOTE that clicking '*Confirm*' returns you to the 'Users' tab, but does not finalise your changes. You must click the '**Save**' button to the bottom right of all admin portal main pages to permanently commit your updates.