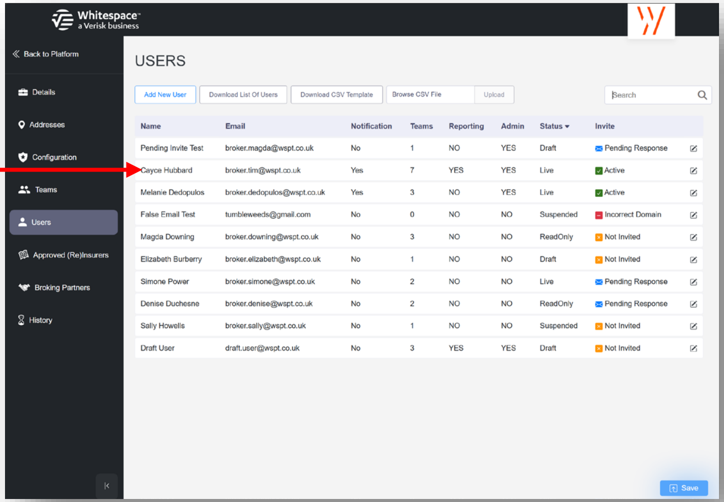
New Broker Creation and Management Permissions for the Platform and API

1.



A suite of permissions gives organisations fine-grained control over broker user account activity, including both on the platform and via the API.

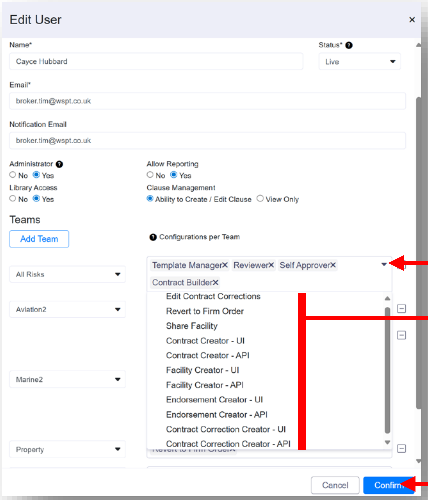
These permission are issued to users on a team-by-team basis.

Users who do not have a permission for their current team are not shown the associated action.

To minimise disruption, all broker users default to being given these permissions at roll-out for all the teams that they are assigned to. After the initial roll out of permissions, Admins need to assign them to new users as usual.

To edit permissions, select the 'Users' tab in the Admin Portal and click on the entry for the user. By default, a user being added to a team is assigned any permissions common to all other members of that team.

2.



In the 'Edit User' pane, click the drop-down box showing the user's permissions for the team to revise.

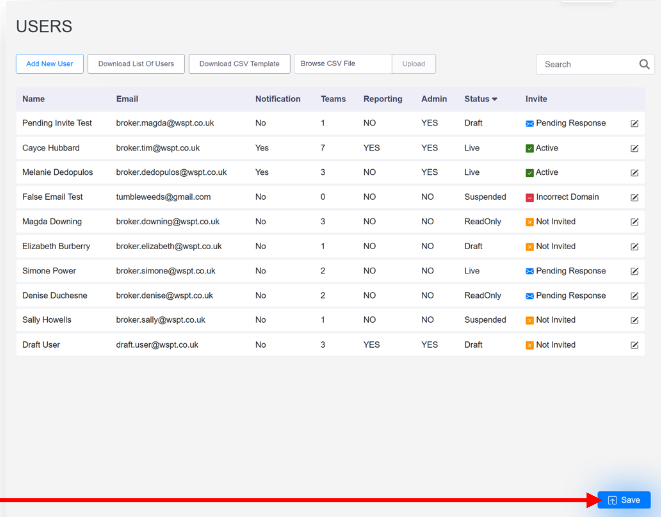
'Revert to Firm Order' was introduced in v3.0 of the Platform, and 'Contract Builder' and 'Share Facility' in 3.1. These permissions give access to the named functionalities.

Specific permissions control whether brokers may create new contracts (and declarations), endorsements, or facility agreements, on the Platform (UI) or via use of API calls (API).

The older 'Contract Corrections' permission has been broken into the dual 'Contract Correction Creator – UI/API' permissions for opening a new blank contract correction document to a contract, and 'Edit Contract Corrections' for populating, progressing, and finalising a blank correction.

When all necessary team permissions have been configured, click 'Confirm' to set the changes as pending.

3.



Once all necessary users have been given the appropriate permissions, click 'Save'.

Please note that no pending changes in the Admin Portal are actually applied until the 'Save' button has been pressed.