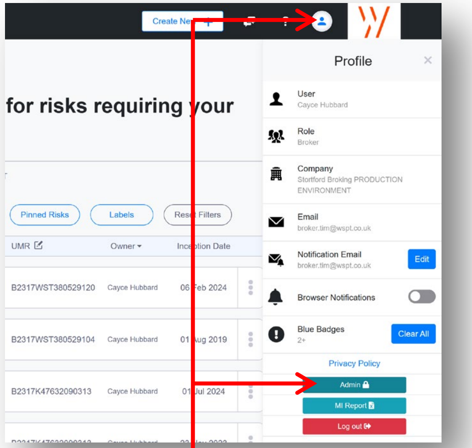
Adding a Draft User and Setting Them Live

1.

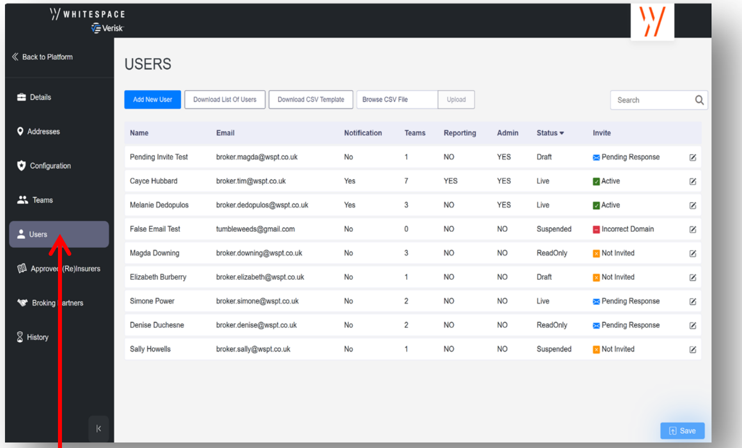


Please Note: Only users with 'Administrator' permission are able to access the admin portal.

Other users will not see the 'Admin' button.

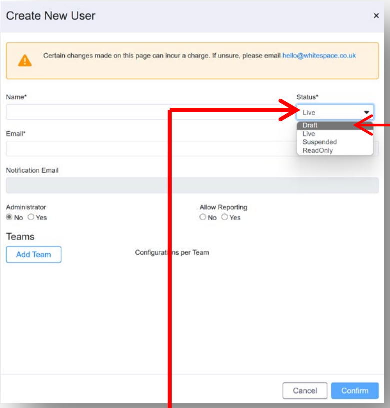
Click the profile icon near the top right of the dashboard and then click the 'Admin' button in the drop-down Profile box.

2.



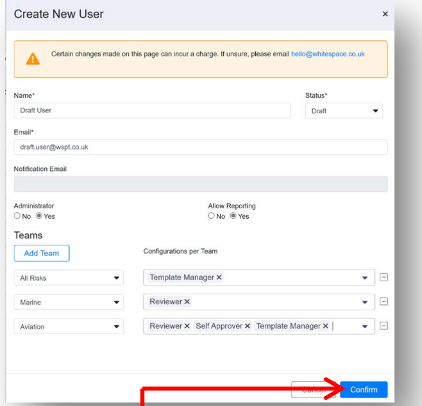
In the Admin Portal, click on the 'Users' button in the black sidebar to open the Users Panel.

3.



Click on the drop-down 'Status' box and select 'Draft' from the list of options.

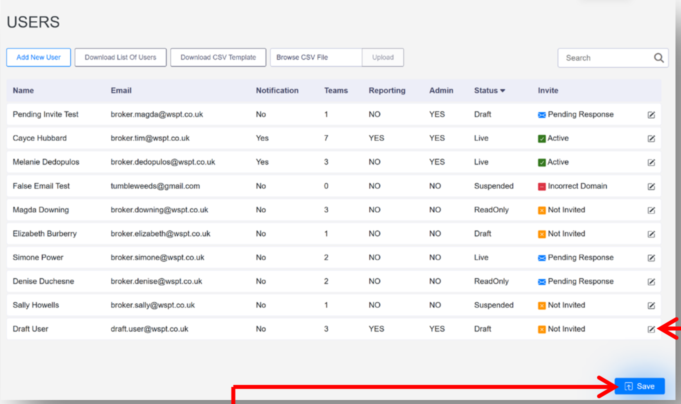
4.



Please note that 'Template Manager' is a team permission that only applies to broker users. (Re)insurer users will not see this team option.

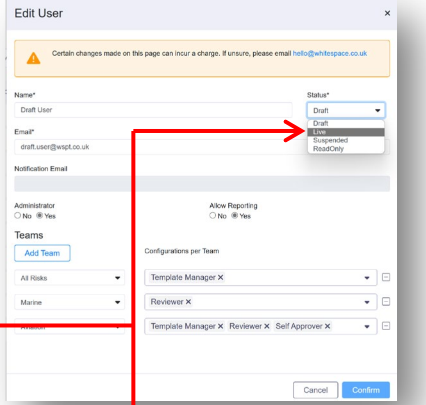
Fill in the user's name and email address, toggle Admin and Reporting permission if required, and optionally click the 'Add Teams' button to add one or more teams with permissions as appropriate. When the user is configured, click 'Confirm' to continue.

5.



All changes confirmed in the Admin portal are considered pending until saved. You **must** click the blue 'Save' button in the bottom right corner to actually finalise the changes. The new user will then receive an invite email to log in to the Platform.

6.



For a full guide to adding and editing users, including adding very basic user profiles in bulk, please see the comprehensive **Admin Portal Guide** on our user guides page, whitespace.co.uk/user-guides

To change the user's status from 'Draft' to 'Live', click the pen-and-paper icon at the far right of their Users Pane entry to open the 'Edit User' box, then click on the 'Status' drop-down and select 'Live'. Remember to click 'Confirm' and 'Save' to finalise the change.