The Financial Implications of User Role and Status

Free Administrator and Librarian Users

To add a free Administrator user, set their status to 'ReadOnly' and their 'Administrator' flag to 'Yes'. Do NOT assign them any teams.

'ReadOnly' users without teams can also be given permission to access and make changes to the Contract Library without incurring charge. To activate this permission, set their 'Library Access' flag to yes.

Librarians can also be given 'Clause Management' permission, allowing them to create and edit Library content of the 'Clause' Line Item type. This does not affect their free/paid status.

A free user can be both an Administrator and a Librarian, if required.

Broker Librarians with assigned teams have full access to the Contract Builder in all their teams, irrespective of the team permissions. However, since the Contract Builder creates new contracts in one of a user's teams, free Broker Librarians cannot access it.

MI and Contract Builder

To access MI reports, a user must be a chargeable 'ReadOnly' or 'Live' user assigned to the team/s to view the MI reports for, and their 'Allow Reporting' flag must be set to 'Yes'.

To use the Contract Builder, non-Librarian Broker users must be 'Live', and they must have the 'Contract Builder' permission added to each appropriate team.

Draft and Suspended:

Users set to 'Draft' or 'Suspended' cannot log into the platform and do not incur charges.

Once a user has accepted their initial platform invitation and become 'Active', they can be set as 'Suspended', but not set back to 'Draft'.

If you reinstate a 'Suspended' user within six months of their suspension, they will incur charges backdated to when they were suspended.

Read Only and Live

'ReadOnly' users can access the platform and view/export contracts of teams they are assigned to, but they cannot conduct any business. They incur charges when assigned to any team.

'Live' (commonly known as "Full User") users have normal access to the platform and incur the charges associated with a Live user.

Please note that there is a minimum of three months' charge upon saving a user as 'Live', or as 'ReadOnly' with team access, even if that user is then suspended.