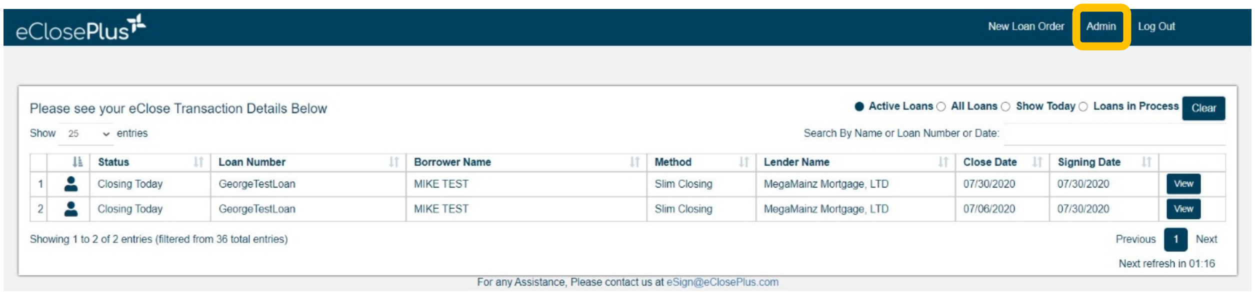
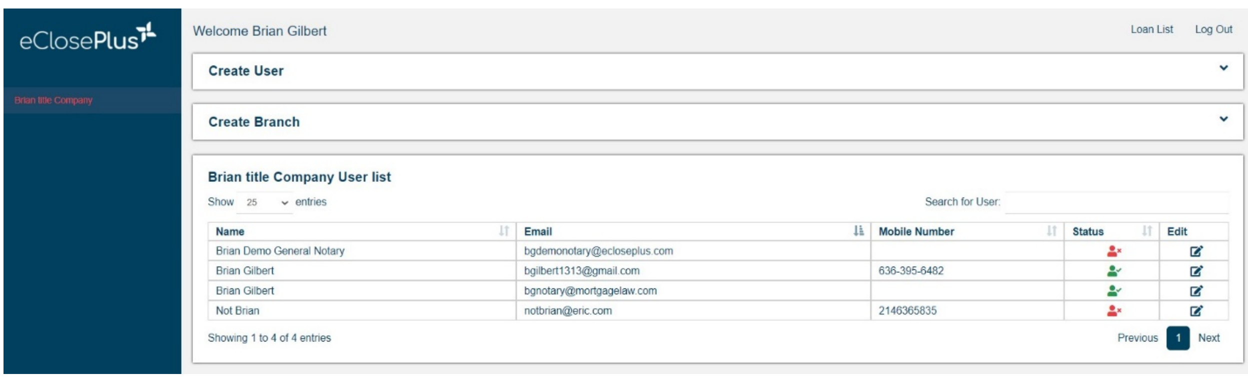
To access the admin features of the eClosePlus portal, click on “Admin” from the Transaction List Page.



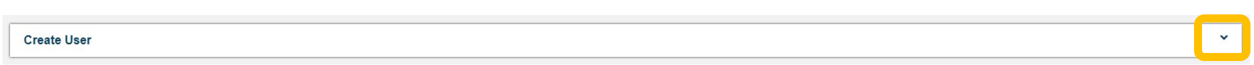
From the Admin page you can:

- Create users
- Edit their permissions and information
- Create branches

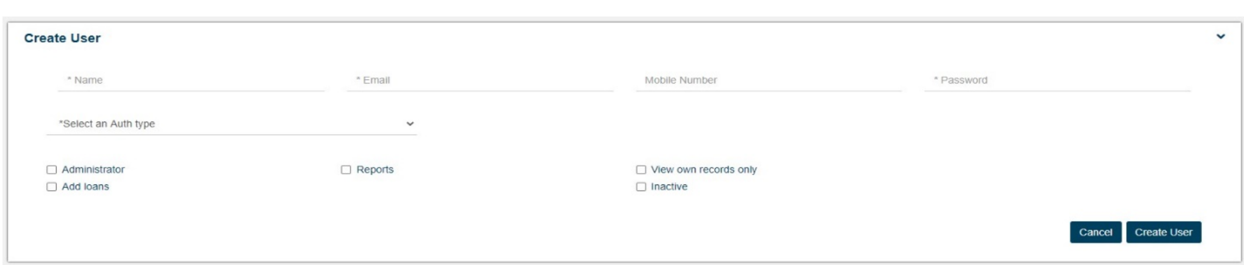


Create a New User

To create a new user, click on the downward arrow from the main Admin page.

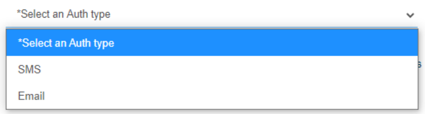


This will reveal the form to enter all of the new user’s information.

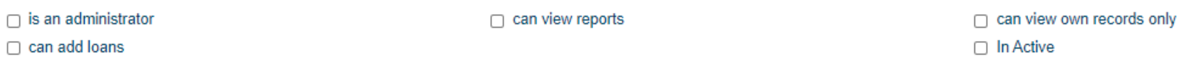


Enter the user’s: Name, Email, Mobile Number and Password here.

Select the preferred method for the 2-factor authentication.



Select the desired permissions for the user.

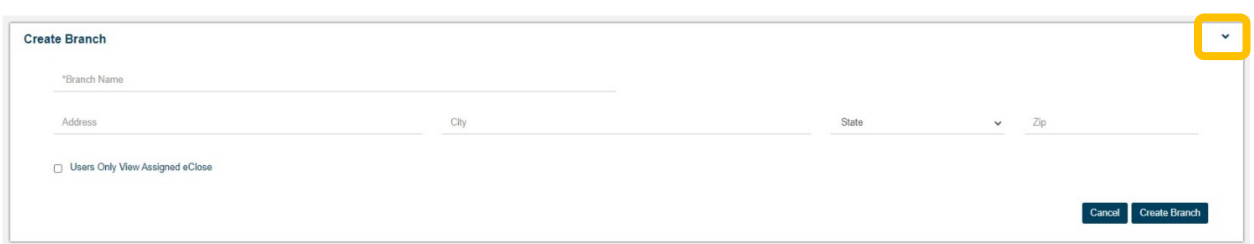


- **Administrator** – User can create and manage other users in the Admin portal, can make all available changes in the Loan portal
- **Add loans** – User can manually add loans in the New Loan Order screen
- **Reports** – User can access and review all available reports
- **View own records only** – User is restricted to viewing only their loans in the Loan List
- **Inactive** – All user permissions and access has been suspended

When finished, click “*Create User*”

Create a New Branch

To create a new branch, click on the downward arrow from the main Admin page.



Enter the branch information and click “*Create Branch*”

Edit a User

The Company User List will show all users that have been created and the status of each user.

- Is an active user

- Is an in-active user

Brian title Company User list

Show 25 entries Search for User:

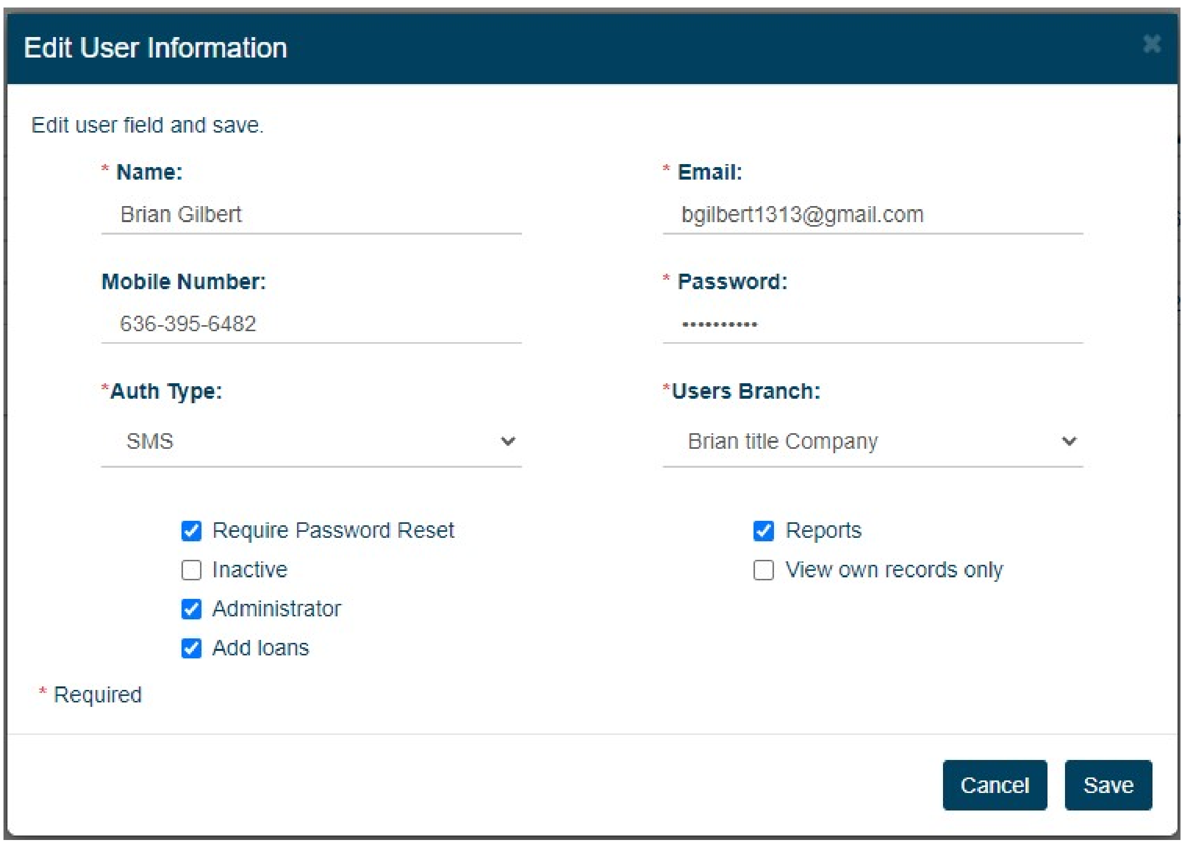
Name	Email	Mobile Number	Status	Edit
Brian Demo General Notary	bgdemonotary@ecloseplus.com			
Brian Gilbert	bgilbert1313@gmail.com	636-395-6482		
Brian Gilbert	bgnotary@mortgagelaw.com			
Not Brian	notbrian@eric.com	2146365835		

Showing 1 to 4 of 4 entries Previous 1 Next

To search for a specific user, enter their information here: Search for User:

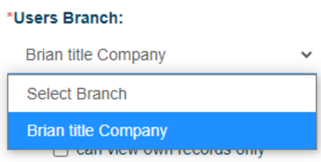
To edit a user, either double click on the user or select the edit icon:

The Edit User Information screen will appear.

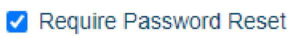


From here you can edit any of the information for the user including their information, password, and 2-factor authentication type.

You can now assign that user to a specific Branch



You can change any of their permissions including requiring them to reset their password.



To accept all changes to the user's account, click "*Save*"

Help

If you have questions or need additional help, click the chat icon on the bottom right of the page to speak with one of our Concierge team members.