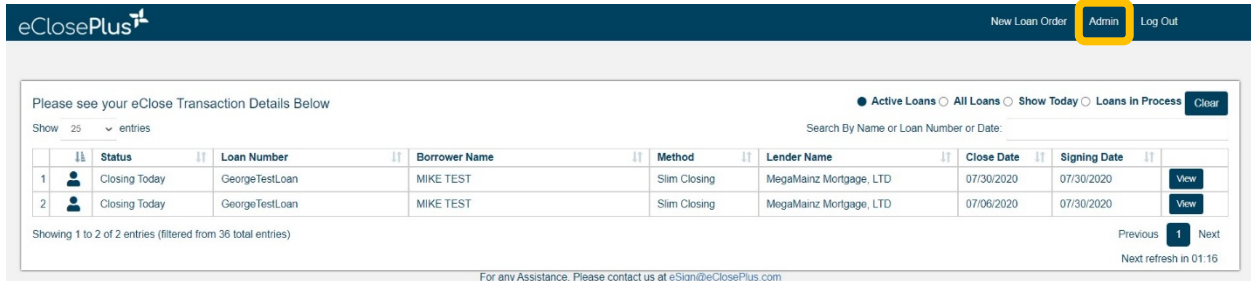
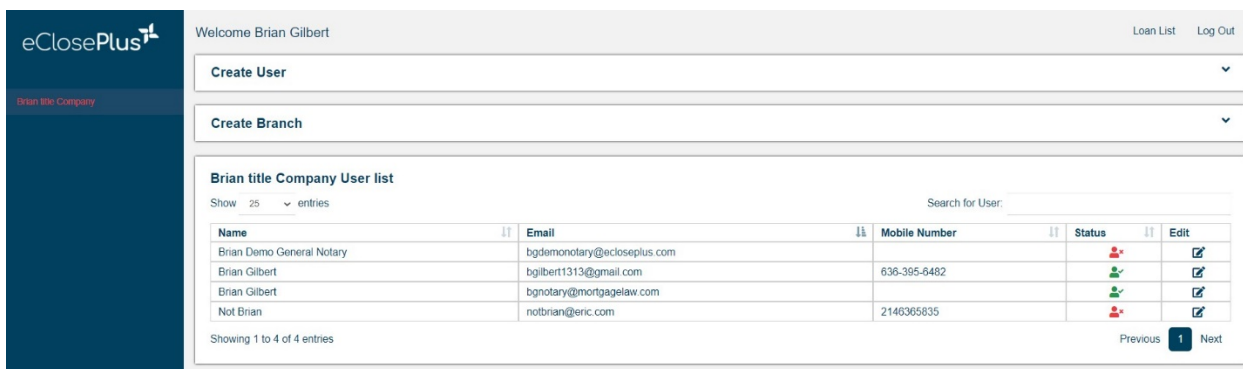


To access the admin features of the eClosePlus portal, click on “Admin” from the Transaction List Page.



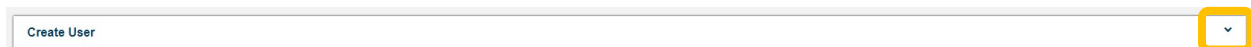
From the Admin page you can:

- 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.

Create User

* Name * Email Mobile Number * Password

*Select an Auth type ▼

Administrator Reports View own records only
 Add loans Inactive

Cancel Create User

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

* Name _____ * Email _____ Mobile Number _____ * Password _____

Select the preferred method for the 2-factor authentication.

*Select an Auth type ▼

*Select an Auth type

SMS

Email

Select the desired permissions for the user.

- is an administrator
 can view reports
 can view own records only
- can add loans
 In Active

- **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.

Create Branch ▼

*Branch Name _____

Address _____ City _____ State _____ Zip _____

Users Only View Assigned eClose

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:

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

The Edit User Information screen will appear.

Edit User Information ✕

Edit user field and save.

*** Name:**

Mobile Number:

***Auth Type:**

*** Email:**

*** Password:**

***Users Branch:**

Require Password Reset

Inactive

Administrator

Add loans

Reports

View own records only

* Required

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

***Users Branch:**

Brian title Company ▼

Select Branch

Brian title Company

can view own records only

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

Require Password Reset

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

Cancel 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.

