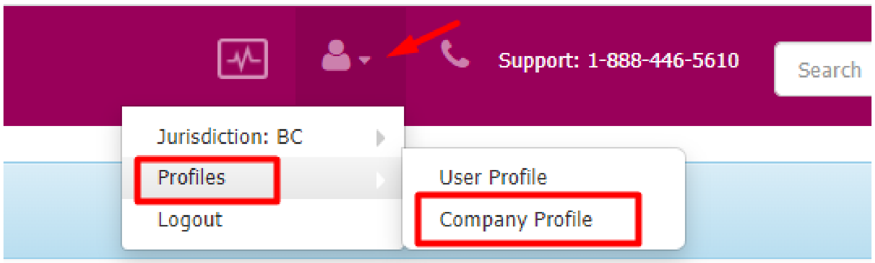
SETTING UP A NEW USER

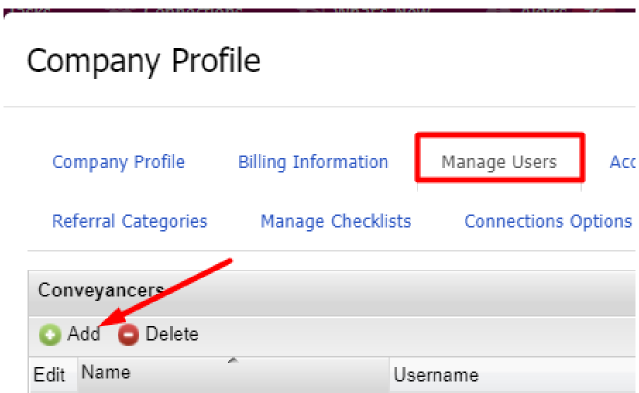
A user at a firm with administrative privileges in econveyance is able to add a new user (conveyancer) to the Company.

Navigate to the Profiles icon on the pink menu bar across the top of the econveyance page.

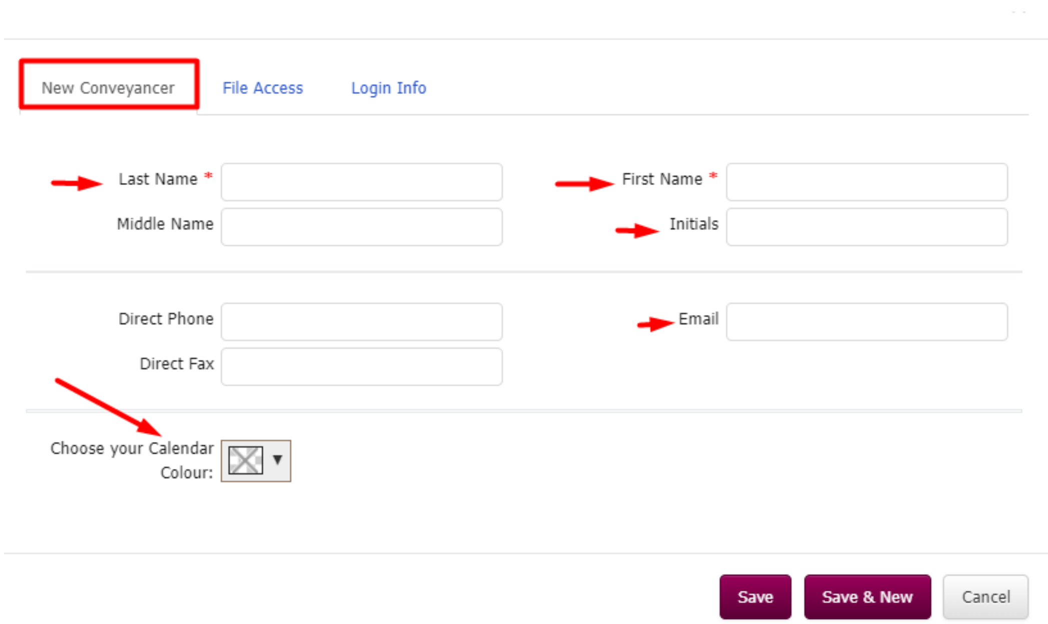
1. From the drop-down menu hover your cursor over **Profiles** and then click on **Company Profile** in the fly-out menu.



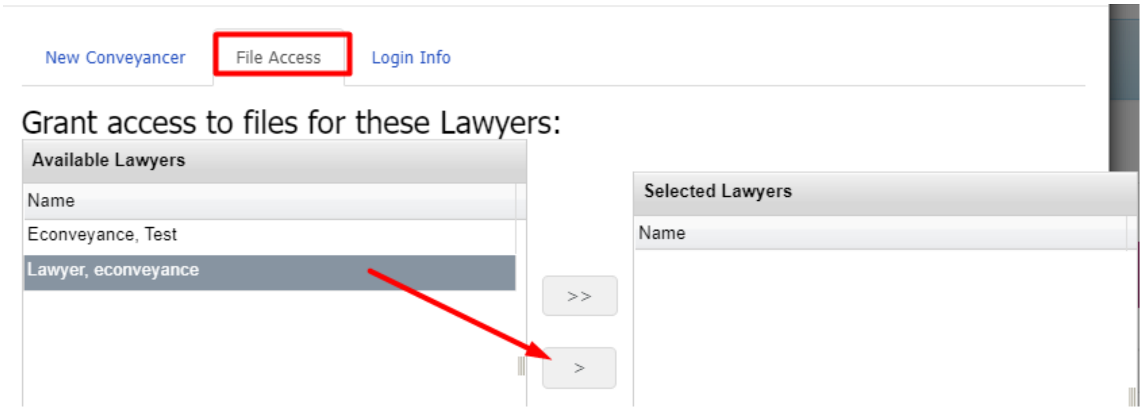
2. Click on the **Manage Users** tab and click **Add** at the top of the list of Conveyancers



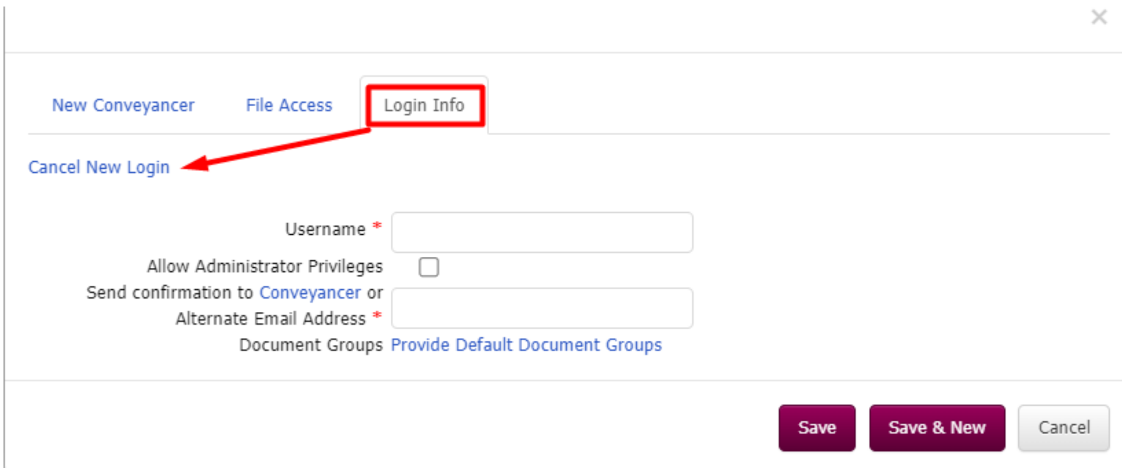
3. On the first tab **New Conveyancer** fill in the last name, first name, initials and email address for the user. You may also set the file color for the calendar if your firm uses this feature.



4. On the second tab File Access select and move the Lawyers/Notaries that the user will be doing files for from the list of Available Lawyers/Notaries to Selected.



5. On the third tab **Login Info** you can create the login/username for the user by clicking "Create New Login":



1. Enter the username. The username can be anything of your choosing such as an email address or first initial and last name.
2. If the user is to have Administrative Privileges in econveyance select the tick box. The Administrator has the ability to make changes in the Company Profile and add and remove users. We suggest only one or two people having administrative privileges at a firm at one time.
3. Click on the blue link conveyancer to bring in the email from the new users' profile to send the confirmation email to or enter the email address where the authentication email is to go to so that the user can be authenticated and set up. *(This email will have steps to set up the user and a temporary password)*.
4. Click "Provide Default Document Groups". This will trigger the default document groups to be provided to the user in their files and it will trigger the email to be sent from the program. If you have customized documents the user can add them to their groups and modify their groups at any time.

The email should arrive in approximately 2-5 minutes. Because the email is auto generated by the system sometimes it may go to your Junk folder and sometimes the email may not come in at all. It depends on the firewall settings of your firm. If the email is not delivered, please call the Very Helpful Desk and we will reset the password from our end.

Please note: The activation email expires after 48 hours.