



# **AD Appraisal Center**

## **User Guide for Clients:**

### ***User Profile***

Powered by



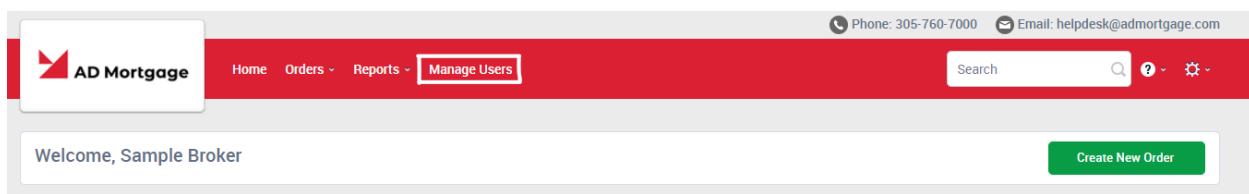
## User Profile

### Add New Users (Master Users Only)

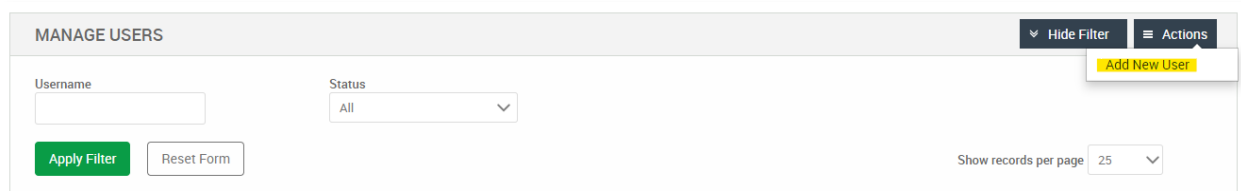
Client **Master Users** have the ability to add users for their company to the system.

To **Add Users** to the system, follow the steps below:

- 1) Log on to your AD Appraisal Center account.
- 2) Click on **Manage Users** on the navigation bar.



- 3) Click on the **Actions** button on the top right of your screen and click on **Add New User**.



- 4) Fill out the user's information and assign them a username and password.

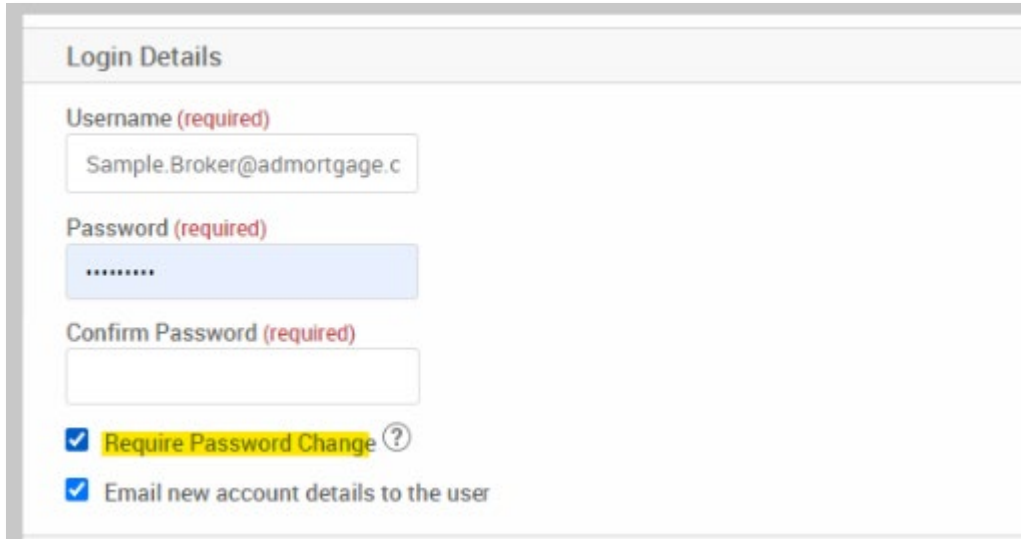
#### ADD NEW CLIENT USER

You may use the screen below to add users for your company. When you add a user, they will receive an email notification with their credentials

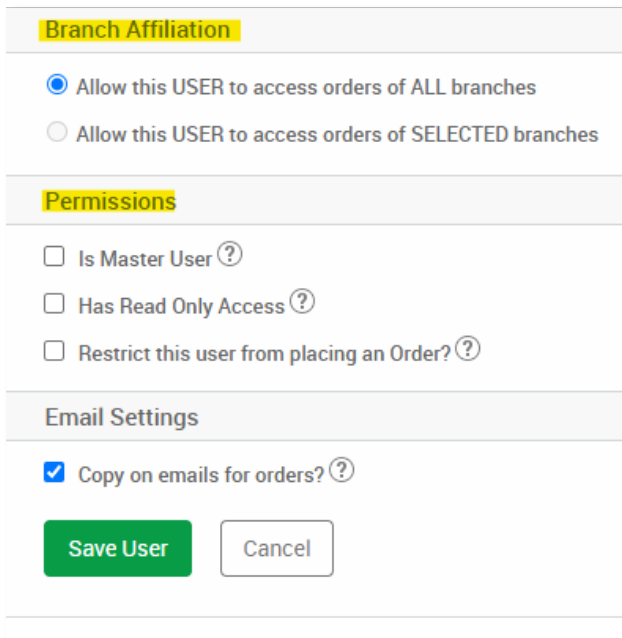
**User Details**

<p><b>Client (required)</b> !!! Test Broker</p> <p><b>First Name (required)</b> <input type="text"/></p> <p><b>Email (required)</b> <input type="text"/></p> <p><b>Department</b> <input type="text"/></p> <p><b>User Notes</b> <input style="width: 100%; height: 40px;" type="text"/></p>	<p><b>Last Name (required)</b> <input type="text"/></p> <p><b>Phone</b> <input type="text"/></p> <p><b>Type</b> Select One</p>
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5) Username is the user's email address. Select the Require Password Change button.



6) Select the Branch Affiliation and the type of Permissions the user will have.



**Note:** Hover over the question marks for description of each permission access.

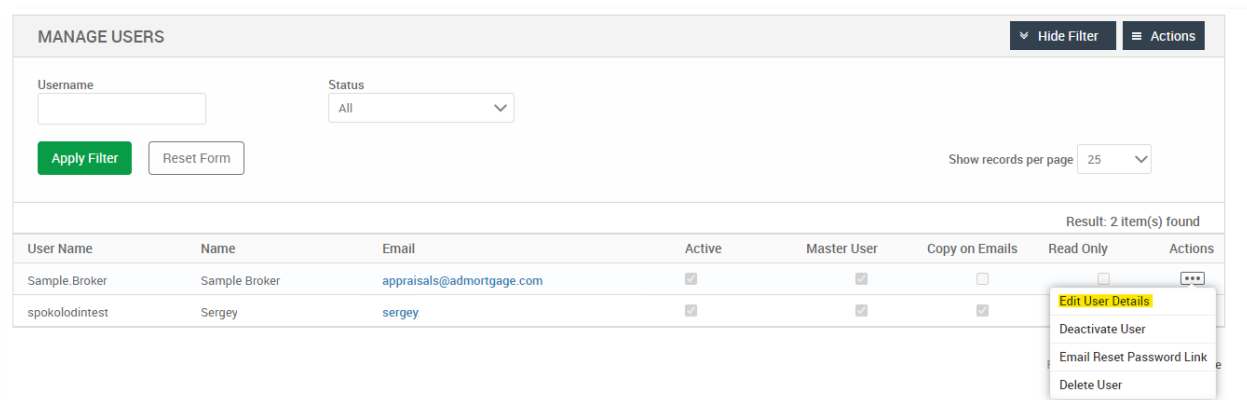
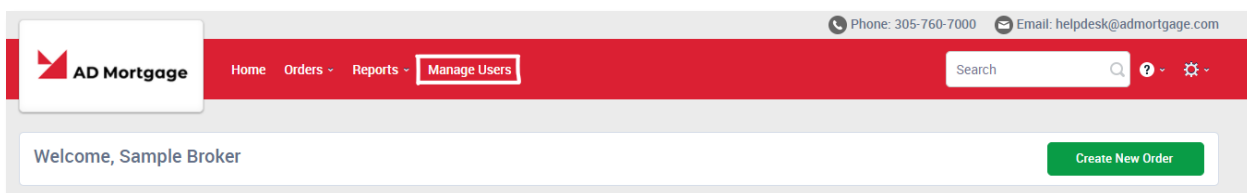
7) Click on the **Save User** button to add the user to the system.

## Edit Company Users (Master Users Only)

Client Master Users can also edit/update information for all users for their company.

To **edit information of Company Users** on the system, follow the steps below:

- 1) Log on to your AD Appraisal Center account.
- 2) Click on **Manage Users** on the navigation bar.



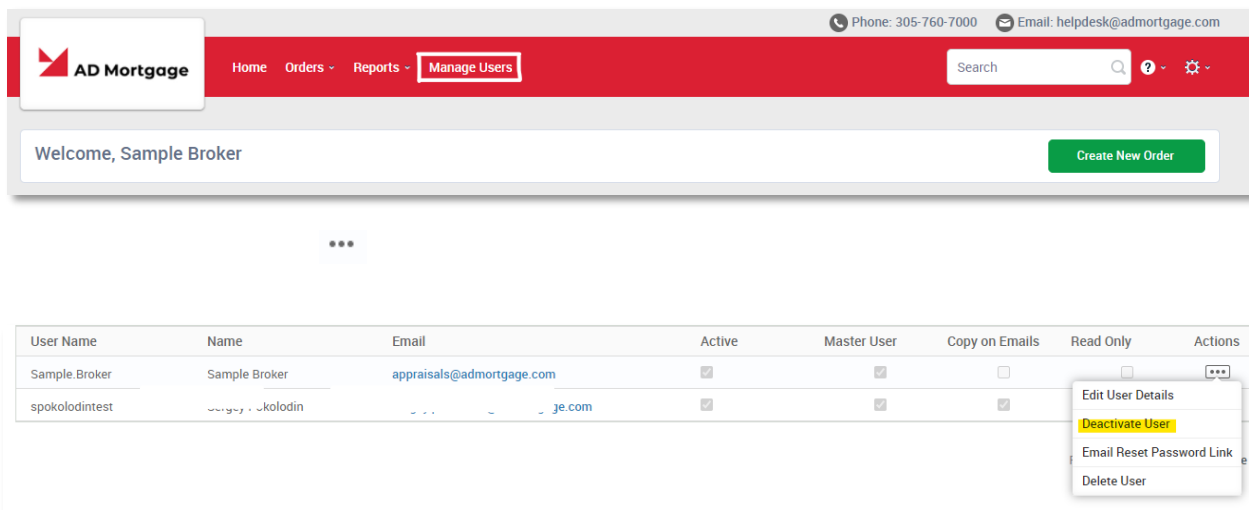
- 4) Make the necessary changes to the user's profile.
- 5) Click on the **Save User** button to save the updated information in the system.

## Deactivate Company Users (Master Users Only)

Client Master Users have the ability to deactivate users in their company so that they no longer have access the system or receive system notifications.

To **Deactivate Users** on the system, follow the steps below:

- 1) Log on to your AD Appraisal Center account.
- 2) Click on **Manage Users** on the navigation bar.



- 4) Click on **Deactivate User** to deactivate the user's profile.

The same process can be followed to re-activate profiles of users which have been deactivated.