



USERS, ROLES, AND PERMISSIONS

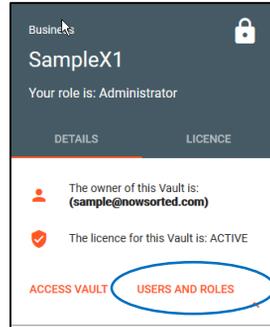
- Now Sorted’s sophistication enables a Vault owner to permit others full or limited access.
- To ensure security, there are three separate stages (filters) for a Vault owner to control.
- These stages are described below.

Stage 1: Users & Roles

Users & Roles defined:

Whether as a Business or Personal User, the person who signs up to pay for a vault licence, is identified as **the Administrator** of the vault. They have full control of the vault and can see everything in it no matter who entered the data or uploaded the documents.

The **Administrator** controls the vault for which they are paying Now Sorted a licence fee; they may invite others to have full or limited access to the vault. To do this, they start by clicking on **Users & Roles** on the card representing their vault.



When **Users & Roles** is clicked, an icon with a **person and + sign** is seen to the left. Click this icon to invite (add) a new User to the vault.



After the icon is clicked, an **invitation card** appears. Enter the invitee’s details. When you come to User Role, note there are three options: **Administrator**, **Create Family**, **View Family**. Take care with your selection.

If you select **Administrator** (only three in total are allowed per vault) you are granting the same ‘highest level’ privileges as for yourself – including the power to delete *any* other User. You would normally select **Administrator** when you are incapacitated or where you plan to sell the business to a new owner. Be sure they are trustworthy.

If you select **Create Family**, you are most likely a Business User and are giving permission to an employee or associate to attract families to the vault; such Users can only see the families they attract. If you select **View Family**, you are going to give access to a relative or friend of family to view some or all family records (see below).

Once you have decided on a Role for the invitee User, select it before moving to the next stage – selecting a specific family within the vault to grant Overall Permissions.

Stage 2: Overall Permissions for a Specific Family

Overall Permissions

On the **invitation card**, below the Users & Roles, section, appears a **list of Families** in the User’s vault. In this example, we feature the **Sample** Family. The initial status shows that **No Access** is allowed. To change this, go to the **V** down arrow on the right.



Clicking on the **V** brings up a menu of items: **No Access**, **Read**, **Read/Write**, **Read/Write/Delete**. **Read** means an invitee can only read what they see.

Read/Write, means an invitee can read, edit and add to what they see. **Read/Write/Delete**, means an invitee can carry out any of these actions.

Once selected, in this example, the **Overall Permission** for the invitee for the **Sample** Family is **Read/Write**.

For Stage 3 – Detailed Permissions, see next page.

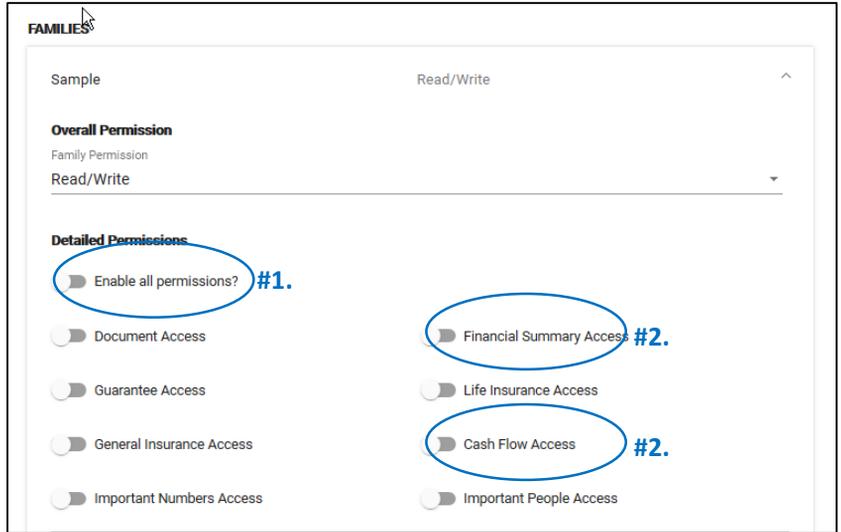


Stage 3: Detailed Permissions for a Specific Family

Detailed Permissions

These are very easy to set up and setting them will depend upon what kind of access the Vault owner wished to permit. As can be seen in the table, there is a series of buttons – which, by default are all in the Off position.

If the invitee is a senior family member, it may well be that they are accorded **Enable all permissions** status, in which case there is only one button to turn On (#1.)



On the other hand, it may be that the family wants their accountant to have **Financial Summary Access** as well as **Cash Flow Access** but nothing else (#2.) In this case those are the two buttons to turn On.

Warning:

Data and documents stored in a User’s vault will most likely be private and privileged information. Vault owners must exercise great care in setting up permissions so that nobody is allowed to see anything other than what a family wishes.

Final step:

- Once the permissions are set up as required, simply click the Invite button on the invitation card.
- An email goes automatically to the invited User.
- The email contains a link for the invitee to click so that they can log in to the relevant vault and, setting up their own U/name and P/word, they can log into the vault and abide by the permissions that have been granted.

Re-cap on Users, Roles, and Permissions

1. While in the vault, click **Users & Roles**.
Decide on the role for your invitee: **Administrator**, **Create Family**, or **View Family**.
Click the **Person with + sign icon** to create an invitation card.
2. On invitation card, set specific family **Overall Permission** as **Read**, **Read/Write**, or **Read/Write/Delete**.
3. Below Overall Permission, set **Detailed Permissions**. Use on/off button feature to set up.
First button **Enables all permissions**. Set other buttons individually to suit requirements.

Double check to make sure as required. If OK, send invitation email.
On receipt, invitee uses email address as U/name and sets up P/word to log in to relevant vault.

If further help is required we suggest:

- Visit www.nowsorted.com > Facilities > Great Links > Videos
- Visit www.nowsorted.com > Facilities > Great Links > FAQs
- Email us: support@nowsorted.com