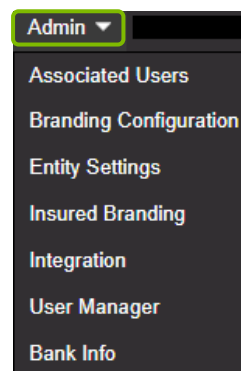




The Administrative User will manage ipfs.com settings.

The first user to register the entity on ipfs.com is an Admin, only Admins can view the Admin tab. Additional Admins can be assigned.



Associated Users

- Add or remove users associated to work under this entity profile.

Branding Configuration/Insured Branding

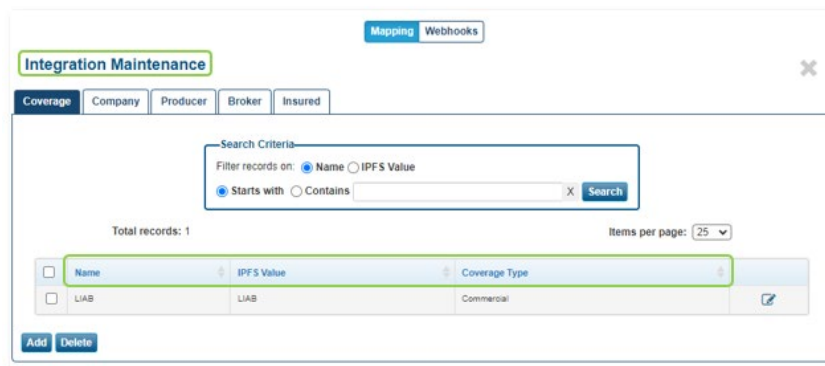
- Setup or edit branding with IPFS. This allows you to integrate your logo and color schemes onto IPFS platforms.
- Contact your Sales Executive or see [Quick Guide – Branding](#).

Entity Settings

- Control how the PFA displays fees and how they are disclosed.
- Enable email settings.
- Setup AutoPay options offered to your clients.

Integration

- Allows you to map the codes/names in your Agency Management System to comparable IPFS values.
- Coverage, company, producer, broker and insured can be mapped.
- Web Hooks allows for subscription management to track events in the loan cycle when subscribed.



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User Manager

User Manager

Help for User Manager

- Add or delete users.
- Edit users by clicking on their Login.



Add New User

- When adding a new user, assign roles to the user.
Checking the Admin role provides all role options to be available.
- Save the entry, and an email will be sent to the user to complete the registration process.

Add User

Full Name:

First Name:

Last Name:

Email Address:

Roles:

- eSign
 - Agent Signs on Behalf of Self and Insured
 - Insured Signs First, then Agent
 - Agent Signs First, then Insured
- Show 1st Invoice Button
- Admin
- Account Status
 - Online Payments
 - Return Premiums Allowed
 - View Own Notes and Reminders
 - No Notes or Reminders Viewable
 - View All Notes and Reminders
- Reporting
- Show Amount Financed per Policy
- Quoting
 - Renewals
 - Hide Delete Bank Account Button
 - View Own Quotes Only
 - Allow Edit APR
- Document Management Full Access
- Manages Webhook registrations and subscriptions

Down Payment Methods (select one or both)

- Down Payment Via ACH
- Down Payment Via CC

Bank Info

- Add new ACH accounts for use with IPFS.
- Edit or replace existing ACH accounts.
- Track pending ACH account requests.

Bank Info

Active ACH Accounts

Account Nickname	Bank Name	Account Number	ABA/Routing Number	Type	Actions
	UMB, NA	*****4789	****0804	Net Premium (Trust Account)	
	FIRST HORIZON BANK	*****1444	****0413	Policy Commissions & Fee Credits (Operating Account)	View / Replace

Pending ACH Account Update Requests

Request Type	Status	Account Nickname	Bank Name	Account Number	ABA/Routing Number	Type	Actions
EDIT	PENDING	Loan Funds	UMB, NA	*****4789	****0804	Net Premium (Trust Account)	Edit / Delete

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