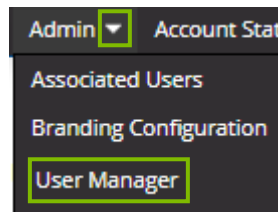




## ipfs.com

1. Log in to ipfs.com
2. Only Admins can add users and make changes under User Manager.



## User Manager

Click here for on screen guidance

User Manager		Help for User Manager			
	Login	Name	Email	Created	Last Login Date
<input type="checkbox"/>	ryantest1	Ryan	Ryan@ipfs.com	5/5/2021 10:04:25 AM	4/23/2025 02:47 PM
<input type="checkbox"/>	demouser	Demo User	test@ipfs.com	4/23/2025 2:44:12 PM	4/23/2025 02:46 PM
<input type="checkbox"/>	No login ID	Matt Wilson	Matt@ipfs.com	10/5/2023 12:55:11 PM	

1. Click the **Login** name to access that user
2. Delete a user by checking the box next to their Login and select **Delete**



If there is no date under, **Last Login Date**, registration has not yet been completed. You can **Resend Registration Email** within the user access by clicking **No login ID**. (See *additional details at the end of this document*.)

## Add User

1. On the **User Manager** page, select **Add**
2. Complete the fields to enter the **Full Name**, **First Name**, **Last Name**, and **Email Address** of the user.
  - a. The designated email address from this field will receive the registration email.

<b>Full Name:</b>	<input type="text" value="Test User"/>
<b>First Name:</b>	<input type="text" value="Test"/>
<b>Last Name:</b>	<input type="text" value="User"/>
<b>Email Address:</b>	<input type="text" value="test@agent.com"/>

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3. Select the roles you want to assign to the user. These roles can be edited at any time.

**User**

Full Name:

First Name:

Last Name:

Email Address:

Roles:  eSign

- Agent Signs for Self and Insured in Non-Sign State
- 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
- Webhook Admin ?

Down Payment Methods (select one or both)

- Down Payment Via ACH
- Down Payment Via CC

**Resend Registration Email**

**Save** **Cancel**

4. Select **Save**.

5. The added user will receive an email to complete registration, which will expire in 48 hours.

a. You can **Resend Registration Email** by selecting the option within User access.

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