

Guide to setting up a new branch user

Insured Scheme

This guidance document details step by step instructions on how to set up a new branch user in the TDS Insured Scheme and provides a breakdown of the branch user permissions and functions.

- 1 Firstly, click on **Edit account**, and add your email domain into the fields (as outlined in the screenshot below) under **Member User Settings**. This allows you to add users with the domain in one of the below fields.

Edit Account

Any fields marked with an * must be completed

Account Details

Company Name: Test Agent

Trading Name: test

Phone *: 01234567891

Email Address: joe.bloggs@tenancydepositscheme.com

Website: Website

Invoicing Details

Contact name for invoices: Contact name for invoices:

E-mail address for invoices to be sent to: E-mail address for invoices to be sent to:

Contact telephone number for invoice queries: Contact telephone number for invoice queries:

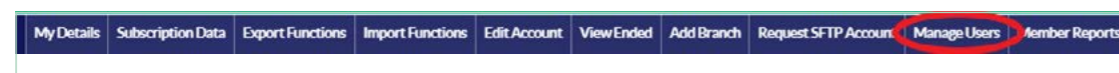
Member User Settings

Allowed user email domain: testtest.com

Allowed user email domain: @exampledomain.co.uk

UPDATE

- 2 Next, select the **Manage Users** tab, which is available at the top of your main account page. You can manage the user in the **Manage Users** section (below), where you can create new users, edit existing users, and disable users.



- 3 For each user you can also update their permissions for certain branches and add/delete branches:

Edit User test user

User Details | **User Permissions**

Add New Permission

Here you can select which branch(es) this user has read only access to.
You can select 'Global Member Access' to allow them read only access to all branches within this membership

Branch Access*: Nothing selected

SAVE

Existing Permission Management


Please note the user will have read only permission until the options below are changed.
You can also remove access to certain branches from this page by selecting delete next to that branch.
For details on the different permission options please view our guidance document here (hyperlinked to a document we will add)

Branch	Permission Levels Options	Options	
Testagent2 Branch ID: -1::108582 Address: Testagent2 1 The Progression Centre Mark Road Hemel Hempstead Industrial Estate Hemel Hempstead HP2 7DW	Admin Import Export Dispute Management Tenancy Management	<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	DELETE

- 4 Permission level options per branch are: **Admin, Import, Export, Dispute Management and Tenancy Management**. If no permissions are set for the branch this will be read-only access.
- 5 An additional level of permission is to select **Global member access**, which allows the user to view all branches associated with that member.
- 6 Global member access permissions are: **Admin, Import, Export, Dispute Management, Tenancy Management, Request SFTP and add branches**.
- 7 If no permissions are set for global member access, they will have read-only access across all branches.

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