



Note: This option is only available to Company Administrators.

Log in to your Pavaso account and select **My Company**. Choose **Edit** next to the appropriate branch. You may need to search for a particular branch.

The screenshot shows the 'My Company' page in the Pavaso interface. The navigation bar includes Home, My Messages, My Team, My Company (highlighted with a red box), Help, and Cindy Closer. The main content area has tabs for 'Companies' and 'Users'. Below the tabs is a search bar for companies. A table lists two companies:

Company Name	Company Type	Address	City	State	Action
(TEST Training) B...	Title	2901 Dallas Pkwy	Plano	TX	Edit Add Branch
(TEST) BH Lender	Lender	1234 Test Street	Plano	TX	View Add Branch

At the bottom right of the table, it says 'Display 2 of 2 items'.

Select the **Users** tab and **Add User**.

The screenshot shows the 'Edit Company' page for '(TEST Training) BH Title'. The navigation bar is the same as the previous screenshot. The main content area has a breadcrumb trail: 'My Company / (TEST Training) BH Title Edit Company'. On the left, there is a sidebar with navigation options: General Information, Users (highlighted with a red box), Partners, Branches, Instruction Configuration, Pre-Close Setup, and Message Configuration. The main content area has a search bar for users and a table of users:

First Name	Last Name	User Name	Email	UserType	Status	Action
Frank	Closer	frankcloser	frankcloser@mail...	Adminis...	Active	Edit Disable Remove
Eddie	Closer	eddiecloser@emai...	eddiecloser@em...	User	Active	Edit Disable Remove
Cindy	Closer	cindycloser	cindycloser@mail...	Adminis...	Active	Edit
Breanne	Haas	bhaas@pavaso.com	bhaas@pavaso.c...	Adminis...	Active	Edit Disable Remove

At the bottom right of the table, it says 'Display 4 of 4 items'.



Enter the user's email address and first and last name.

My Company / (TEST Training) BH Title
Edit Company

Details for

User Status: Active

User Type: User Primary Admin

* Email: ellieuser@email.com

* First Name: Ellie

* Last Name: User

* Default Role: None

Cancel Save

Select a **Role** for the user. Any role select in the **Role** dropdown must also be selected for the **Default Role**.

- A. Title companies will always select **Closing Agent**. This is applicable for all types of individuals including Escrow Officers, Processors, Assistants, etc. Title company users will always be the Closing Agent role type.
- B. Lender companies will always select **Lender**. This is applicable for all types of individuals at a Lender company.

My Company / (TEST Training) BH Title
Edit Company

Details for

User Status: Active

User Type: User Primary Admin

* Email: ellieuser@email.com

* First Name: Ellie

* Last Name: User

* Role: Closing Agent

* Default Role: None

Save



Select a **User Type**.

- A. The Administrator role has permissions to add users, certain company configuration settings, and ability to view all orders for branches. There is no limit on the number Administrators for a company.
- B. The User role does not have permission to add users, company configuration settings, and will only see orders assigned to them specifically.

The screenshot shows the Pavaso web application interface for adding a user. The top navigation bar includes the Pavaso logo, Home, My Messages, My Team, My Company, Help, and a user profile for Cindy Closer. The main content area is titled 'My Company / (TEST Training) BH Title' and 'Edit Company'. A left sidebar contains a menu with options like General Information, Users, Partners, Branches, Instruction Configuration, Pre-Close Setup, Message Configuration, Configuration, Closing Methods, Company Configuration, Notary Maintenance, and Report Configuration. The 'Details for' form is displayed with the following fields: User Status (Active), Email (ellieuser@email.com), User Name, Phone, Role (Closing Agent), and Test User (checkbox). The User Type dropdown menu is open, showing 'User' as the current selection and 'Administrator' as the highlighted option. A 'Primary Admin' checkbox is also present. At the bottom of the form are 'Cancel' and 'Save' buttons.



Once all fields are complete, select **Save**.

The screenshot shows the Pavaso user creation interface. At the top, there is a navigation bar with the Pavaso logo and links for Home, My Messages, My Team, My Company, Help, and a user profile for Cindy Closer. Below the navigation bar, the breadcrumb path is "My Company / (TEST Training) BH Title" and "Edit Company". On the left, there is a sidebar menu with options: General Information (selected), Users, Partners, Branches, Instruction Configuration, Pre-Close Setup, Message Configuration, Configuration, Closing Methods, Company Configuration, Notary Maintenance, and Report Configuration. The main content area is titled "Details for" and contains the following fields:

User Status	Active	User Type	User	Primary Admin	<input type="checkbox"/>
* Email	ellieuser@email.com	* First Name	Ellie		
User Name		Middle Name			
Phone		* Last Name	User		
* Role	Closing Agent	* Default Role	Closing Agent		
Test User	<input type="checkbox"/>				

At the bottom of the form, there are two buttons: "Cancel" and "Save". The "Save" button is highlighted with a red box.

Pavaso Support

Business Hours: Monday – Friday 7:00 am – 8:00 pm CST

Email: support@pavaso.com

Phone/ Closing Hotline: (866) 288-7051

24/7 Online Help Library: Log in to your Pavaso account and click on **Help** next to your name.