



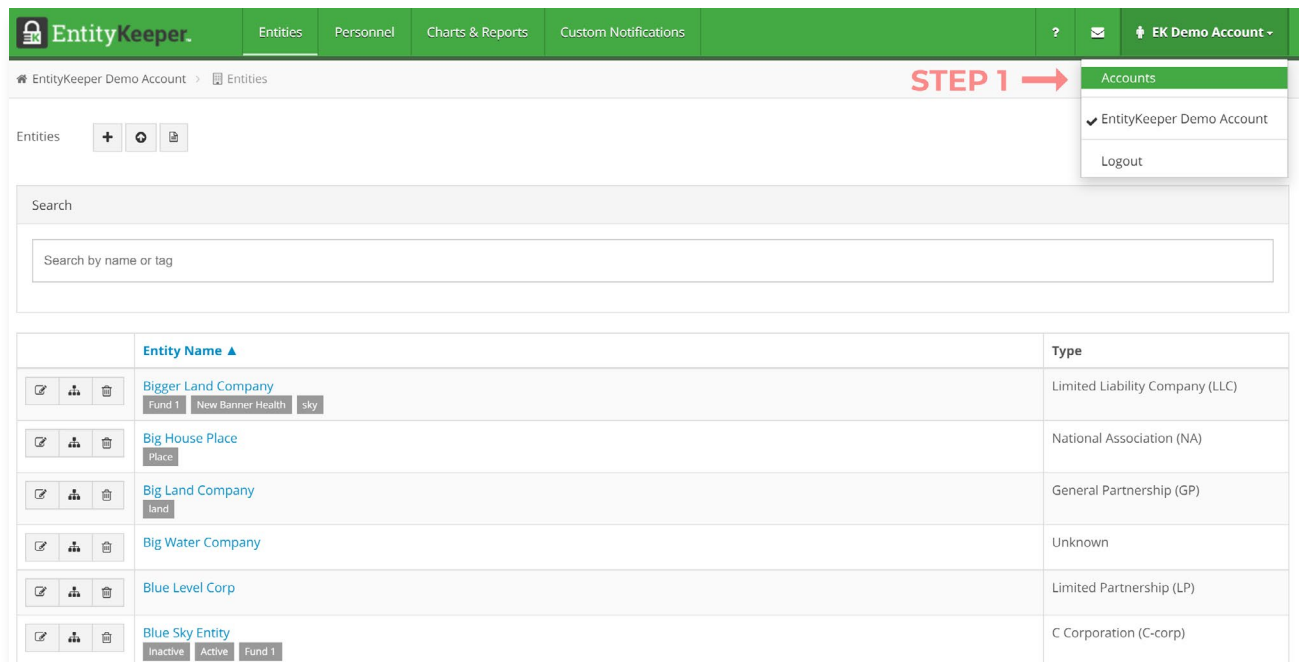
USER GUIDE

Assigning Custom Entity Access for a New User



















**Available for Enterprise users only.*

Custom Entity Access allows administrators to grant users access to view specific entities.

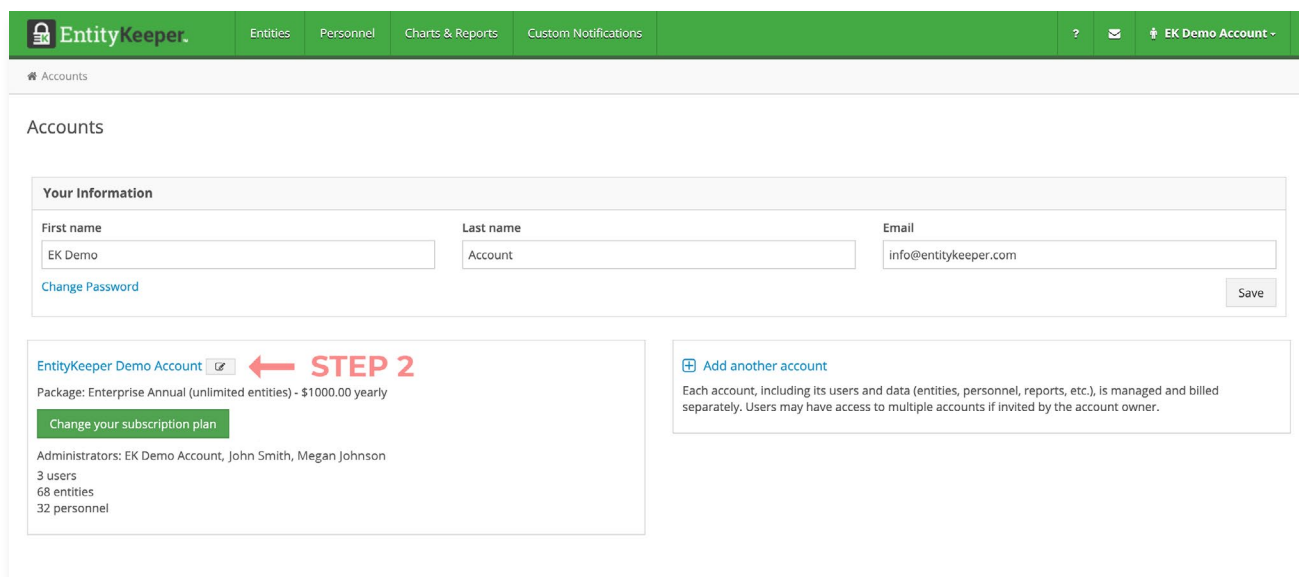
STEP 1 | Navigate to the Account section located at the top right corner of the screen, in the dropdown menu select 'Accounts'.



The screenshot shows the EntityKeeper application interface. At the top, there is a green navigation bar with the EntityKeeper logo and several menu items: Entities, Personnel, Charts & Reports, Custom Notifications, a help icon (?), an email icon, and a user profile icon labeled 'EK Demo Account'. Below the navigation bar, the breadcrumb trail reads 'EntityKeeper Demo Account > Entities'. A red arrow labeled 'STEP 1' points to the 'Accounts' option in the dropdown menu that is open under the user profile icon. The dropdown menu also includes 'EntityKeeper Demo Account' (with a checkmark) and 'Logout'. Below the menu, there is a search bar with the placeholder text 'Search by name or tag'. The main content area displays a table of entities.

	Entity Name ▲	Type
  	Bigger Land Company Fund 1 New Banner Health sky	Limited Liability Company (LLC)
  	Big House Place Place	National Association (NA)
  	Big Land Company land	General Partnership (GP)
  	Big Water Company	Unknown
  	Blue Level Corp	Limited Partnership (LP)
  	Blue Sky Entity Inactive Active Fund 1	C Corporation (C-corp)

STEP 2 | Click on the 'Edit' icon located next to the account name.



The screenshot shows the 'Accounts' page in the EntityKeeper application. The navigation bar is the same as in the previous screenshot. The breadcrumb trail reads 'Accounts'. Below the breadcrumb, there is a section titled 'Your Information' with three input fields: 'First name' (containing 'EK Demo'), 'Last name' (containing 'Account'), and 'Email' (containing 'info@entitykeeper.com'). There is a 'Change Password' link and a 'Save' button. Below this section, there is a box for the 'EntityKeeper Demo Account' with a checkmark and a red arrow labeled 'STEP 2' pointing to it. The box contains the following information: Package: Enterprise Annual (unlimited entities) - \$1000.00 yearly; Change your subscription plan (button); Administrators: EK Demo Account, John Smith, Megan Johnson; 3 users; 68 entities; 32 personnel. To the right of this box is an 'Add another account' button and a text box explaining that each account is managed and billed separately.

STEP 3 | Click on the [+] next to 'Users' to open the next dialogue box.

The screenshot shows the EntityKeeper application interface. At the top is a green navigation bar with the EntityKeeper logo and menu items: Entities, Personnel, Charts & Reports, Custom Notifications, a help icon, a mail icon, and a user profile icon labeled 'EK Demo Account'. Below the navigation bar is a section titled 'Custom Fields' with a '+' icon. It contains a table with columns 'Name' and 'Field type'. The table lists several date-related fields and a 'Signer' field.

	Name	Field type
	Acquisition Date	entity
	Consolidated Date	entity
	Date of Incorporation	entity
	Dissolution Date	entity
	Dissolve Date	entity
	Signer	bank

Below the 'Custom Fields' section is a section titled 'Users' with a '+' icon. A red arrow points to this '+' icon, and the text 'STEP 3' is written in red next to it. The 'Users' section contains a table with columns 'Name', 'Email', 'Permissions', and 'Invitation Status'. It lists three users: 'EK Demo Account', 'John Smith', and 'Megan Johnson', all with 'Permissions: Master Control' and 'accepted' status.

	Name	Email	Permissions	Invitation Status
	EK Demo Account	info@entitykeeper.com	Permissions: Master Control	accepted
	John Smith	jsmith@ekdemo.com	Permissions: Master Control	accepted
	Megan Johnson	mjohnson@ekdemo.com	Permissions: Master Control	accepted

At the bottom left of the interface is a green circular icon with a white question mark.

STEP 4 | Fill out the new user details. Grant permissions levels. Select which entities the user can access to view. Save.

New User

User Details ← ADD USER INFO

Email: email | First Name *: First Name | Last Name *: Last Name

General Permissions ← SET PERMISSIONS

Master Control *NOTE | Can Add Entities
 Can View Reports | Can Edit Entities
 Can See Sensitive Information | Can Delete Entities

Entities Accessible by User ← SELECT ENTITIES

Search: []

All Entities
 Secondary Entity 2 (multi tiered)
 Second Tier Entity (multi tiered)
 Slate Rock Capital
 Snow Shoe LLC
 Solar Sky Investments
 Something Else
 South Marina Owner
 Spotted Circle

SAVE → Save

Note: Make sure the 'Master Control' check box is unchecked to ensure the user does not have full access to all entities. (view above image - red rectangle)