

## HOW TO CREATE MAILBOX ACCESS FOR YOUR CUSTOMER

### Creating New Mailboxes

If you are adding a User to a new Mailbox you are creating, click on Mailboxes in your left side navigation panel. In the upper right-hand corner of the next page, add the new mailbox name, then click Add. If you are a Reseller/Partner network, you will also see the “Portal/No Portal” option. If you want your customers to have portal access to their mailbox(es), move the box in front of the Add button to “Portal”:



Once the mailbox is set up, you will click on Users under Management in the left side navigation panel, then on the next page, click Create:



Follow these steps:

1. Choose the relevant mailbox from the Mailbox drop down
2. Create a Login Name for your User
3. Create a password for your User (or click Generate Password and we will create one for you)
4. Choose your User’s Authorization Level by clicking on the drop down – Auth level explanations are on page 1
5. Choose whether to send a Notification Email to the User
6. Finish the User Contact information on the bottom of the page and click Save

## Create User

List

The create user function only supports the creation of users/admins for a mailbox.

If no portal exists, then the created user will only have API access to the mailbox or be listed in the Mailbox Detail notification dropdowns.

If a portal exists, then the created user will also be able to login to the specified portal for the mailbox.

If you want to create both a new user and mailbox with a portal login, please use the Invite capability from the left side menu.

### Access Information

**Mailbox:** \* Portal Demo (59631519)

**Login Name:** \* Portal Demo User

**Password:** \*

**Auth Level:** \*

**Send Notification Email:** No  Yes

### Authorization Levels

The Loren Data portal allows Admin users to grant users different role-based access controls. Additionally, Reseller/Partner networks can provide unique portal access to their clients, based on their mailbox. To ensure users have the right access and controls, we have several roles with different access levels, visibility, and edit rights.

There are four main roles for ECGrid Customer users:

**MailboxUser:** This role essentially provides a read-only set of capabilities on the portal and cannot add/edit/invite users but has limited management capabilities for a single mailbox. ***This is most likely the role you will want to grant to your customers/contractors when you give them individual mailbox access.***

**MailboxAdmin:** This role can add/edit/delete IDs, partnerships, and users for a given mailbox. This is the default role for legacy Hubbub users.

**NetworkUser:** This role is used by our resellers and their Operations teams to search transactions across all mailboxes on a network. This is a limited role for internal employees.

**NetworkAdmin:** This role has full access to customizing the portal, sending notifications, adding/editing users, resending files, and full management of all mailboxes for their customer organizations or trading partners.