

Login and Access to Back-office/Admin system

How to access CreditSnap Back-office/Admin system?

1. **CreditSnap Back Office/Admin system URL is unique for your Organization**
 - It usually will be something like <https://abc.creditsnap.com>, where *abc* would be your organization name. Please contact your internal CreditSnap admin if you do not have this URL
2. **Login Credentials**
 - When you are added into the system, you will receive an email with a link to set your own password. If you have not received one, then reach out to your internal CreditSnap admin
 - CreditSnap admin at your organization has the ability to add anyone from the organization to access CreditSnap backoffice/admin system (If you are an admin, see below on how to give CreditSnap backoffice access to employees at your organization)
3. **Login Password Policy:** Your login password must contain at least eight characters, including one uppercase letter, one number, and one special symbol

ADMIN

Employee Management - How to add/remove an employee to the CreditSnap back office and define their permissions ?

1. In order to add/remove an employee to the CreditSnap backoffice/admin system, you will first need to login and will need to have this permission - "*Can Add, Remove, Reset Password for Employees Access*". The master admins on your team will already have this permission enabled. If you are not a master admin please ask your internal master contact to grant access.
2. Navigate to the **Admin** dashboard by clicking on the gear icon (⚙️) on the top right of the BO.
3. This will direct you to the **Employee Management Dashboard**
4. To add an employee click on the **+ Employee** button on the top right of this screen
5. This will surface the Add Employee pop-up
6. On this page you will be asked to add the basic information such as Employee Name, Employee ID and Email. Please ensure the email address is accurate as it will be used to deliver a **Reset Password Link**
7. You can provide permissions by selecting one or multiple roles by checking the below items:
 1. Can Add, Remove, Reset Password for Employees Access
 2. Can Change Rates, Credit Policy and More
 3. Employee can see ONLY those apps created by that employee
 4. Employee can see all applications
 5. Merchant Permission - Can only see apps from the POS location (Please unselect all others)
 6. Needs Access to Credit Reports
 7. Authorized to Fund
 8. Can do manual underwriting, override system decisions to change interest rate and term selections
8. The last permission is a product level permission. **Lending** permission is for access to all loan related products and **Deposit** permission is for all account opening related permissions. **All** would provide the use access to both product categories
9. In order to **Delete , Edit or Reset Password** of an existing employee select the gear icon (⚙️) next to the employee you wish to delete - this will be under the **Actions column**. Here you will see the options

Access Management for Back-office

[Click here](#) to view different access role permissions available within back-office.

Queue Management

Queue management enables admins to set up Queues and assign employees to those created queues.

Revision #7

Created 1 June 2024 19:25:49 by Admin

Updated 10 July 2025 17:42:17 by Mahesh