XpressDox User Management and Permissions ®

USER MANAGEMENT OVERVIEW

- **Only Administrators** on an XpressDox account for the firm can add or remove users to an IowaDocs® subscription.
- Login URL: https://iowadocs.xpressdox.com/

UNDERSTANDING ROLES

Role	Description & Notes
Firm Contact	Used by the ISBA to email a leader in your firm about your subscription — typically for annual renewal purposes. *NOTE: Only one person can be the "Main Contact."*
Administrator	Grants administrative privileges to your IowaDocs® account, including adding/removing users and editing firm information. *NOTE: You can have more than one administrator.*
User	A basic user who can access and use the IowaDocs® system, but cannot manage the account. *NOTE: You can have more than one user.*

EDITING EXISTING USERS

1. Log in as the current administrator.
2. Navigate to **Manage → My Users**.
3. Click the **Edit** button next to the user's name (left side).

Within the Edit screen:
- Check or uncheck the **Roles** as needed (see Role definitions above).
- Ensure the subscription remains active (**IowaDocs® Subscribe** checkbox).
- Click **Save**.

ADDING NEW USERS

1. Click the **"Add User"** button (upper right corner).
2. Enter the user's name and email address.
3. Select **Roles** (see "Understanding Roles" table above for descriptions).
4. Ensure **"Subscribe"** next to the product IowaDocs® is checked.
5. Click **Save**.

ℹ New Administrator users can add/remove users and edit firm information immediately upon saving.

REMOVING USERS

1. Click the **Delete** button to the right of the user's name.
2. Confirm the deletion when prompted.

ℹ Use this when a user no longer needs access or has left the organization.

ROLE CHANGES

- Users can be switched between regular User and Administrator status at any time.
- **Regular users** — Access to IowaDocs® but cannot administer the account.
- **Administrators** — Full account management capabilities.

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