ShareSecure Command Center – Management Component

This guide provides step-by-step instructions on how to properly leverage the **Management Component** within the ShareSecure Command Center. The ShareSecure Command Center lives within Altvia's AIM CRM and enables efficient user management actions between AIM and ShareSecure.

The **Command Center** serves as a comprehensive tool designed to streamline user operations between AIM contacts and their associated ShareSecure user. Each AIM contact is exclusively tied to a single ShareSecure user, ensuring a 1:1 relationship. This promotes clarity and avoids potential overlap or confusion regarding user statuses and actions.
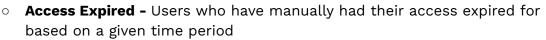
Core Functionality - Below is a breakdown of its core functionalities:

1. **View All Contacts:** Display all Contacts for easy access and management. This is the default view displayed on the table.
2. **Table column information:** For each contact, you can view:
   - **Name**: View the full name of the contact.
   - **Email**: Access the contact's email address.
   - **Account**: Obtain details about the contact's associated account.
   - **ShareSecure Status**: See the contact's current status on ShareSecure, whether they're linked, active, or yet to accept an invitation.
   - **Linked:** Whether or not the AIM contact is linked to a corresponding ShareSecure user.
3. **Actions: Below is the definition of each action that is available for a single or multiple contacts in the table:**
   - **Invite & Link** - This action is creates a new user in ShareSecure and links them to the designated Contact on the table
   - **Re-invite** - This action resends an invite to a Contact who is already linked to an existing ShareSecure User.
   - **Link w/out Invite** - If the user already exists in ShareSecure, this action links it to this Contact, and if the user does not exist, creates it with this Contact's information but does not yet invite them.
   - **Unlink** - This action unlinks an existing Contact with an existing ShareSecure user who **was** previously linked.
4. **Filter by Entity:** Refine your Contact list based on specific entities, making it easier to manage and cater to specific groups or individuals associated with particular entities.
5. **Filter by Investor:** Refine your Contact list based on specific Investors so you can manage and cater to specific groups or individuals at the Investor Level.
6. **Filter by ShareSecure Status:** Sort contacts based on their current ShareSecure status giving you a real-time overview of user activity and engagement. The following statuses are available for filtering on the table:
   - **Unavailable** - User is not a known created or existing ShareSecure user and most likely needs to be created and invited.
   - **Invitation Expired** - Users who were invited to join the portal but didn't accept the invitation before it expired. They need to request a new invitation to join the platform. Invitations expire in 60 days by default.
   - **Pending Invitation -** Users who have been CREATED in the portal but NOT INVITED. Users in this state do not have access to the portal and are waiting to be invited.
   - **Pending Confirmation -** User has been INVITED but not logged into create their account. Users will remain in this status for 14 days after being sent an invite and then move to Invitation Expired if they have not confirmed their account.

- ○ **Access Expired -** Users who have manually had their access expired for based on a given time period
- ○ **Active** - User has accepted the invite to the portal and has access
- ○ **Locked** - This status applies to users whose access to the portal has been temporarily suspended due to suspicious activity during login.

7. **Status & Actions** : For each of the statues above you can take the following actions
   - ○ **Unavailable** - Invite & Link, Link w/out Invite
   - ○ **Invitation Expired** - Re-Invite, Unlink
   - ○ **Pending Invitation** - Invite, Unlink
   - ○ **Pending Confirmation** - Re-invite, Unlink
   - ○ **Access Expired** - Unlink
   - ○ **Active** - No action*
   - ○ **Locked** - No action*

   *denotes actions only available from ShareSecure directly

8. **Bulk Actions**: For efficiency, you can select multiple contacts and perform bulk actions, including Inviting & Linking, Re-Inviting, Link w/out Invite, and Unlinking, all at once.