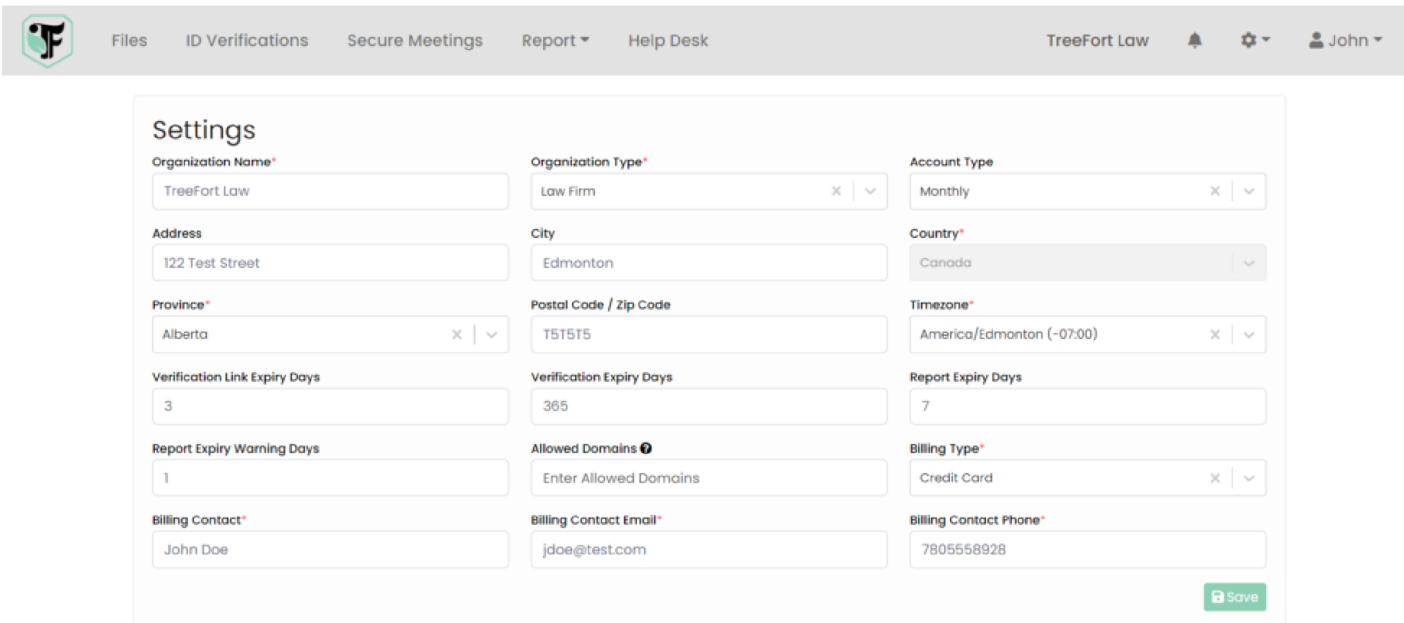
Managing Organization Settings

If you are an administrator at your organization or suborganization, you will be able to manage your organization or suborganization's settings by selecting your name in the top right corner of the TreeFort portal, and selecting **Settings**, as shown below.

You will be directed to a page where you will be able to manage your organization or suborganization's settings, shown below.



Each section in this settings page is described below. **Note:** some options may not be available to select – please contact *support@treefort.tech* for requests to change settings that are not available for selection. If you are an administrator for a suborganization (and not an administrator for the entire organization), some fields may not be available.

Organization Name (Suborganization Name) – this field determines how your organization or suborganization will be represented to your clients during the ID verification process, and the name used for billing reports and invoicing purposes.

Organization Type – this field sets the type of organization (e.g. Law Firm, Insurance Company, etc.), and depending on the type selected, may affect other settings (e.g. required compliance standards for the ID verification process).

Account Type – this field sets the type and tier of your TreeFort account, which may affect features available and pricing.

Address Information – the Address, City, Country, Province, and Postal Code fields are used for billing reports and invoicing purposes.

Timezone – this field sets the default local time zone for users.

Verification Link Expiry Days – this field determines the maximum number of days that the client has to complete the ID verification process using the link sent to the client, which begins once a team member at your organization sends an ID verification request to the client. This can be set to **1, 2,** or **3 days**. Once this time expires, the ID verification request will be cancelled automatically, and a user at your organization must re-initiate the ID verification process with that client.

Verification Expiry Days – this field determines the maximum number of days that a client can remain "verified" in TreeFort and allowed to interact with team members at your organization using TreeFort. Once this time expires, the client will be set as "not verified" and must go through the ID verification process once again for any subsequent interactions with that client using TreeFort. This can be set up to a **maximum of 365 days**.

Report Expiry Days – this field determines the maximum number of days that a client's TreeFort Report is available to be downloaded from TreeFort and saved into an internal document management system at your organization. Once this time expires, the TreeFort Report will no longer be available to download from TreeFort, and details about the ID verification for that client will only be made available in the case of an audit. More information can be found **here** in the **Client Status and Report Expiration** section (section 5.1). This can be set up to a **maximum of 14 days**.

Report Expiry Warning Days – this field determines the number of days before a client's TreeFort Report expires that TreeFort will mark that client's TreeFort Report as a warning status. More information can be found **here** in the **Client Status and Report Expiration** section (section 5.1).

Allowed Domains – entering domains (e.g. @treefort.tech) into this field will require new users at your organization or suborganization to have an email address with that domain. For instance, if the domain @treefort.tech is entered, new users at your organization are required to have an @treefort.tech email address in order to have a TreeFort account. Multiple domains can be entered by using a comma.

Billing Type – this field sets how your organization or suborganization will be billed for charges incurred through use of the TreeFort platform.

Billing Contact Information – use the Billing Contact, Billing Contact Email, and Billing Contact Phone fields to set a contact person for billing and invoicing purposes.