

Adding a Staff Member to the System

To add a staff member the first thing you must do is add them as a person on the software. To do this go to:

- **Person > Add a Person**
- Click **Add**
- From here you can enter their details. The minimum amount of details required are their First and Last Name and their email address. Everything else can be filled in by the staff members themselves at a later date.
- After you have entered their details click **Save** (if you have only entered their name and email the software will notify you that there is missing information. Click **Fix it Later**
- Now that they have been added to the system they can be added as a staff member. Go to
- **My Office > Staff > Select Staff from People List**
- Here you will be presented with a list of every person loaded on to the system. Scroll down the list until you find the person you would like to allocate as a staff member and click on their name.
- After you have clicked on their name the software will require you to add in their username (and email if not provided when adding them as a person).
- Their username will enable them to (along with a password) login into the system, it must be a unique username in order to avoid clashing with another user. The username can contain any spaces. We recommend you try firstname.surname
- Click **Check**
- If this username has already been taken try firstname.surname.company name (or anything else that would make it unique e.g adding a number to the end)
- After you have successfully created a unique username you will be taken to a page to enter in their staff details including:
 - **Password**
 - **Role structure** (Staff, Manager, Partner)
 - **Staff Reference** - This can be their initials but it must be unique e.g you cant have two AE but you can have an AE and an AE1 (staff reference helps allocate companies to this individual by enabling the filter option ((located at the top of many of the systems screens)
 - **Access Rights** - How much access they have on the software e.g can they make changes to information or just look at it but make no changes.
- After all of this is done click **Add Staff**
- We suggest level 5 for all the staff members that will be actively using the system with a couple of level6 Admin users, who can change other users Login IDs or passwords