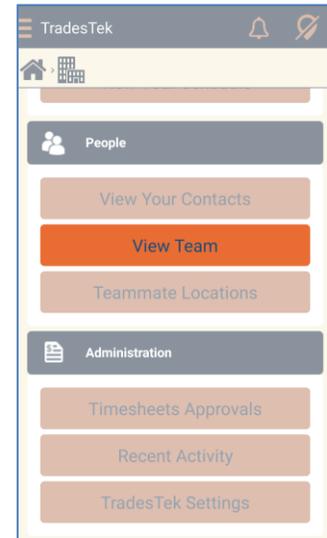
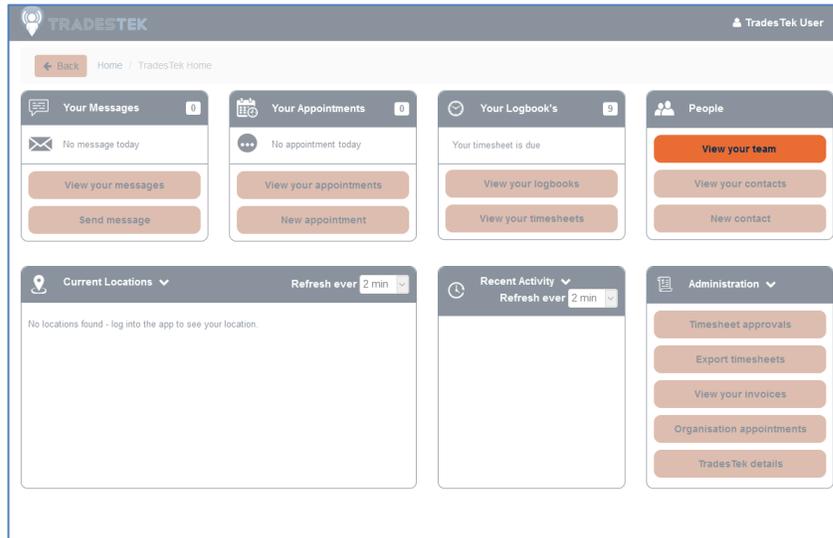


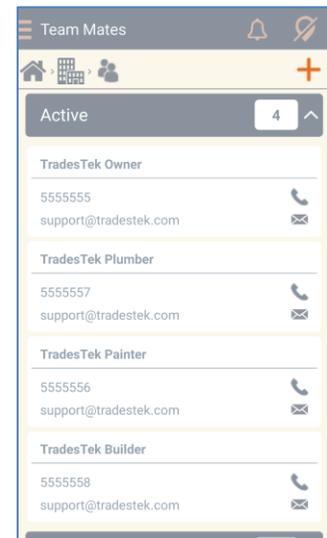
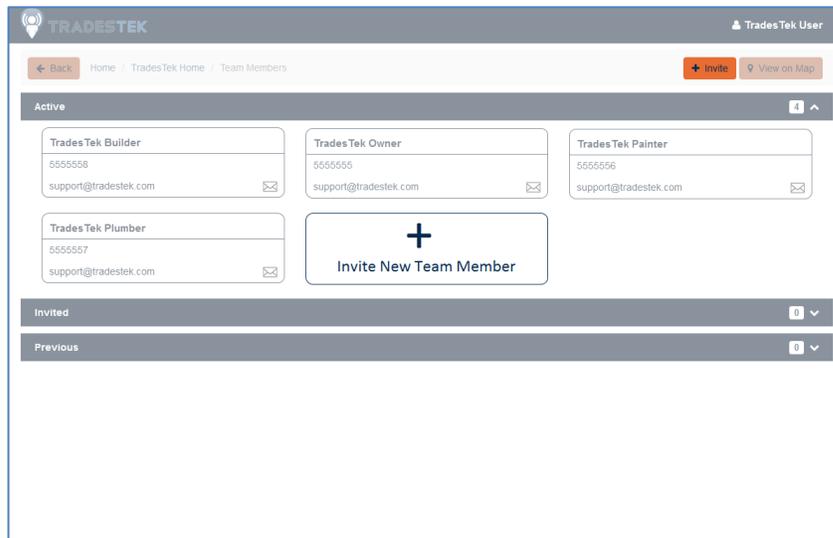


Invite your team

1. Navigate to the Team Screen of the Organisation for which you want to invite a new Team Member.
2. Navigate to the Team Section.



3. Click the "Invite" or "+" button.



4. Complete the "Details" section – This is who the invite is sent to.
If the invitee doesn't already have a TradesTek login they will be prompted to create one with the details entered here.
If they already have a login, as long as it's the same mobile number, they will be prompted to accept your invitation for their existing login to join your Organisation.



TRADESTEK Trades Tek User

← Back Home / Trades Tek Home Team Members Team Member Invite Send Invite Cancel

Details

First Name
TradesTek

Last Name
Electrician

Email Address
support@tradestek.com

Mobile Number
5555559

Settings

Is Administrator

Complete Timesheet

Location Reminder 1 Notification

Location Reminder 2 SMS

Initial location reminder to Administrator Notification

TRADESTEK - INVITE US...

Details

First Name
TradesTek

Last Name
Electrician

Email Address
support@tradestek.com

Mobile Number
5555559

Settings

Is Administrator

Complete Timesheet

Initial location reminder
Notification

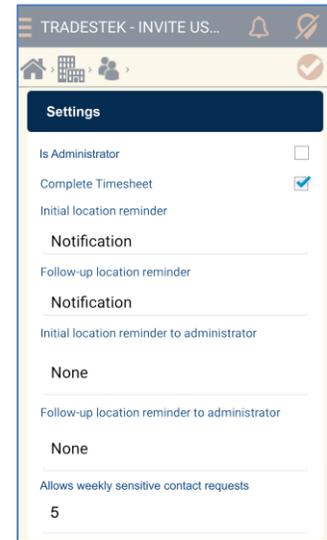
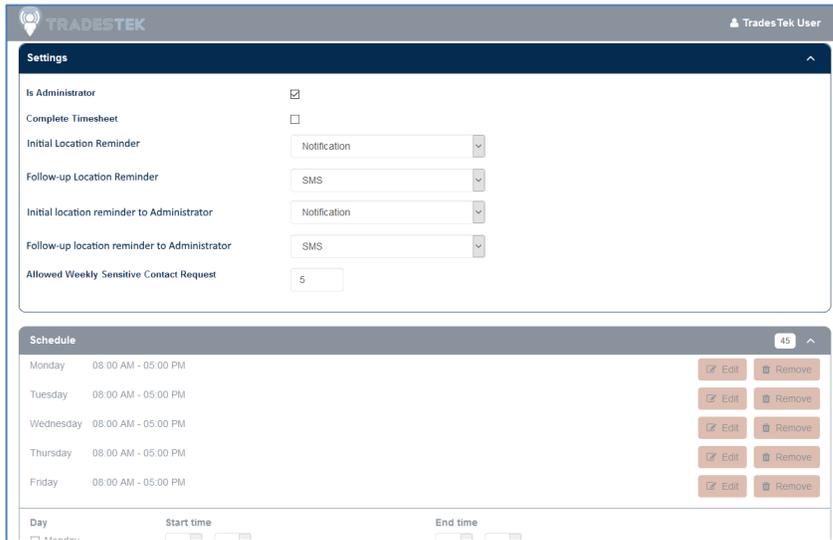
5. Complete the “Settings” section – This defines what they will be able to do within TradesTek and how TradesTek automates tasks for them.

Marking them as an Administrator will grant them the same abilities as you have. For example, they will be able to invite new members to your team, approve timesheets, have unrestricted access to the contacts list, and see the whole team’s appointments.

If Complete Timesheet is selected, TradesTek will automatically build a timesheet for this user for them to check and submit for approval. Uncheck for Admins who don’t have to complete a timesheet so they don’t receive reminders. This feature is only available on the Advanced Plan.

The initial and follow-up location reminders determine how TradesTek notifies the user if it hasn’t been able to determine their location recently. These reminders can also be sent to the Administrators of the Organisation by setting the initial and follow-up reminder to Administrator drop downs.

The allowed weekly sensitive contact requests is a mechanism to allow you to manage access to your valuable information without preventing your users from doing their job. When on the Advanced Plan contacts can be marked as sensitive which restricts their access for all non-admin users. To help ensure your staff are still able to do their job, you can specify the number of sensitive contacts a user can automatically access each week. If set to zero, or if a user has reached their limit for the week, each request to access a sensitive contact will then trigger a message to the Administrators of your Organisation for approval within TradesTek.

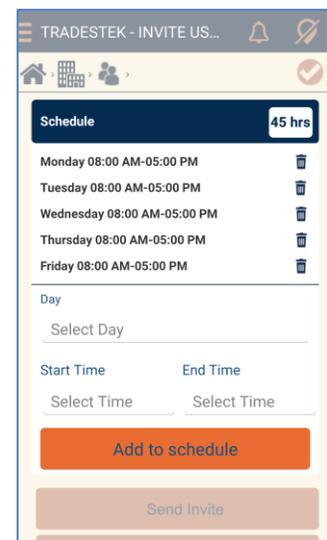
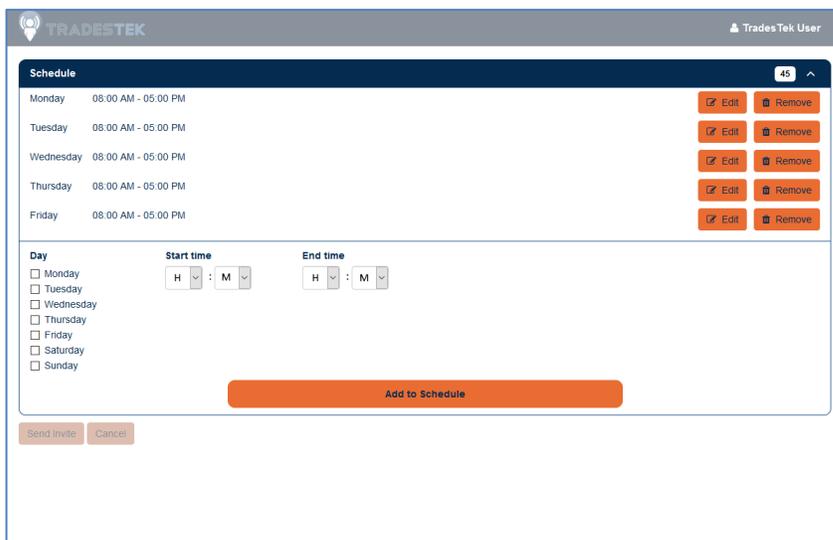


6. Check and update the Schedule section – This defines the hours that the TradesTek system will monitor the User’s location.

Think of it as defining the time that a user is working. If you have set break times you can specify multiple parts of a day as working with break times in-between.

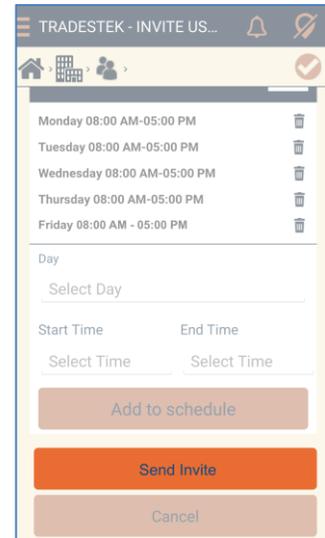
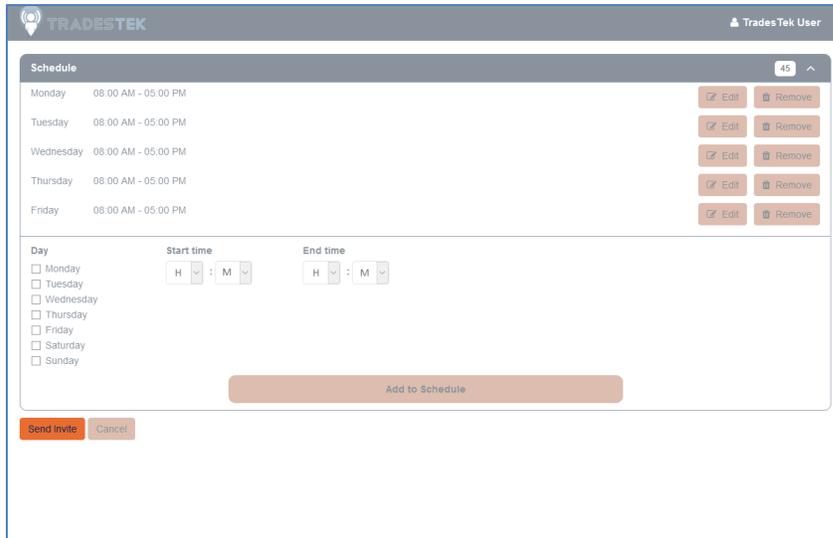
If the time a break is taken is up to the user you can specify their start and end times and then when a break is taken, they can indicate that in the TradesTek app which will also stop the location monitoring during the break.

The users schedule will default to that of the organisation – which can be updated in the Organisation detail screen. Each user’s schedule can then be tailored to them by editing or deleting existing entries of their schedule, and adding new entries by specifying the day, start time and end time and clicking the “Add to schedule” button.





7. Click the "Send Invite" button. This will send an invitation to the User via SMS and Email ready for them to accept.



FAQ

Q: I don't see the invite button from step 3?

A: You need to be an administrator of the Organisation to be able to invite new Users.