

How to get people started and manage roles

IMPORTANT: Before others can start using Business Sorter, the Account Holder must give them access to a plan. To do so, either:

- A. Make them a Team Leader on a plan, or
- B. Make them a Team Member on a plan AND assign them a task on that plan.

Once someone has been made a Team Leader they can also make others Team Leaders and Team Members on plans.

To assign someone a role on a plan, or to change their role:

1. Click on 'Members' in the main menu.
2. Click on the '>' button to the right of their name.
3. On the 'Member's roles' page (below), assign them to the plans you want them to see.
4. Remember to click 'Save'.

MEMBERS

Your organisation has a Basic account.
There are 1/3 Team Leader positions still available and 46/47 Team Member positions still available.

Current members

- Gloria Knight**
Email: gloriamargaretknight@gmail.com
Last login: 29 Nov 2016
- Henry Fox**
Email: henrymichaelfox@gmail.com
Last login: 16 Mar 2017
- John Smart - ACCOUNT HOLDER**
Email: johnoliversmart@gmail.com
Last login: 16 Mar 2017

Click on a member to edit their role on each plan or delete them entirely from this Business Sorter account.

You can resend a pending user's invite to them in case they have lost their activation email.

You can also invite new people to Business Sorter by clicking the button below.

INVITE PEOPLE

The permission levels for each role are outlined in detail on the right-hand side of the 'Member's roles' page.

MEMBER'S ROLES

Gloria Knight

Annual Plan
Sales & Marketing

Team Leader

Unassigned
Team Member
Team Leader

BACK **SAVE**

Assign the member a role on each plan they need access to.

Team Leaders can edit plans they've been added to and start new plans. They can invite other people to these plans and assign them roles - either Team Leader or Team Member.

Team Members can view only the tasks they're assigned (including the related objective and key step). They can't edit plan details, due date, task assignee, or costs. However, they can add notes to their tasks and tick off completed tasks.

Remove this member entirely from this Business Sorter account.

DELETE MEMBER