

Add office staff in one go

When new coordinators start, add them all at once: one line each — name, email, role. Each gets an invitation to choose a password.

1. Under **Add staff**, paste the list — straight from a spreadsheet, or typed: name, email, role. A blank role means coordinator. (Or upload a CSV.)

RECORDS

Staff

Who holds which role. A company always keeps at least one owner.

The roles

Owner. Everything, including who holds which role.

Administrator. Everything but roles: rates, charges and margin, agreements, archiving for good.

Coordinator. The day's work: records, orders, offers, allocation and overrides, credential checks. Not rates, not archiving.

Read-only. Sees the board, the schedule and the records. Changes nothing.

Add staff

1

One person per line: name, email, role (owner, administrator, coordinator or read-only, blank is coordinator). Paste straight from a spreadsheet, or upload a CSV. Each person gets an invitation to choose their own password.

Name, Email, Role

Alex Example, alex@example.com, Coordinator

Or upload a CSV

Choose File

No file chosen

Add

NAME	EMAIL	ROLE	SIGN-IN
Demo Coordinator	coordinator@harlowpeak.invalid	Coordinator	Send a sign-in link
Demo Owner	owner@harlowpeak.invalid	Owner	Send a sign-in link

2. Every line is checked as you type. A line marked in red says what to fix; nobody is added until every line says **Ready**.

RECORDS

Staff

Who holds which role. A company always keeps at least one owner.

The roles

Owner. Everything, including who holds which role.

Administrator. Everything but roles: rates, charges and margin, agreements, archiving for good.

Coordinator. The day's work: records, orders, offers, allocation and overrides, credential checks. Not rates, not archiving.

Read-only. Sees the board, the schedule and the records. Changes nothing.

Add staff

One person per line: name, email, role (owner, administrator, coordinator or read-only, blank is coordinator). Paste straight from a spreadsheet, or upload a CSV. Each person gets an invitation to choose their own password.

Name, Email, Role

Robin Invented, robin@harlowpeak.invalid, Coordinator

Casey Invented, casey@harlowpeak.invalid, Read-only

Or upload a CSV

Choose File

No file chosen

LINE	NAME	EMAIL	ROLE	
2	Robin Invented	robin@harlowpeak.invalid	Coordinator	READY
3	Casey Invented	casey@harlowpeak.invalid	Read-only	READY

Add 2 people

3. Press **Add 2 people**.

RECORDS

Staff

Who holds which role. A company always keeps at least one owner.

The roles

Owner. Everything, including who holds which role.

Administrator. Everything but roles: rates, charges and margin, agreements, archiving for good.

Coordinator. The day's work: records, orders, offers, allocation and overrides, credential checks. Not rates, not archiving.

Read-only. Sees the board, the schedule and the records. Changes nothing.

Add staff

One person per line: name, email, role (owner, administrator, coordinator or read-only, blank is coordinator). Paste straight from a spreadsheet, or upload a CSV. Each person gets an invitation to choose their own password.

Name, Email, Role

Robin Invented, robin@harlowpeak.invalid, Coordinator

Casey Invented, casey@harlowpeak.invalid, Read-only

Or upload a CSV

Choose File

No file chosen

LINE	NAME	EMAIL	ROLE	
2	Robin Invented	robin@harlowpeak.invalid	Coordinator	READY
3	Casey Invented	casey@harlowpeak.invalid	Read-only	READY

Add 2 people

✓ Done. While the company may not send messages, nothing is emailed: copy each person's link and send it to them yourself. It works once. They choose a password, and they are in.

RECORDS

Staff

Who holds which role. A company always keeps at least one owner.

The roles

Owner. Everything, including who holds which role.

Administrator. Everything but roles: rates, charges and margin, agreements, archiving for good.

Coordinator. The day's work: records, orders, offers, allocation and overrides, credential checks. Not rates, not archiving.

Read-only. Sees the board, the schedule and the records. Changes nothing.

Add staff

One person per line: name, email, role (owner, administrator, coordinator or read-only, blank is coordinator). Paste straight from a spreadsheet, or upload a CSV. Each person gets an invitation to choose their own password.

Name, Email, Role

Robin Invented, robin@harlowpeak.invalid, Coordinator

Casey Invented, casey@harlowpeak.invalid, Read-only

Or upload a CSV

Choose File

No file chosen

LINE	NAME	EMAIL	ROLE	
2	Robin Invented	robin@harlowpeak.invalid	Coordinator	READY
3	Casey Invented	casey@harlowpeak.invalid	Read-only	READY

Adding...

✓

Added 2 people. Nothing was emailed — this company is not allowed to send messages yet. Send each person their own link below; it works once.

NAME	EMAIL	THEIR LINK (WORKS ONCE)
------	-------	-------------------------

