

## How to create a new staff, agent, or administrator for your location?

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Within the Seller.CTBIDS.com application you can add users to your location which allows them access to your location information. Such users can have one of three different roles:

Administrators, Staff and Agents

- **Location Administrators** have full access to your location information including managing other users, your location data, sales management, item management, invoice management, customers, and all location reports. Location Administrators can be added and removed (inactivated) from your location with one exception, the original Location Administrator can not be inactivated (this is usually the first administrator added to your account).
- **Staff** can be employees, temporary help, or consultants who need access to creating sales, managing items, processing invoices, and pulling reports.
- **Agents** are limited to sale item creation only and have full edit capabilities for sale items.

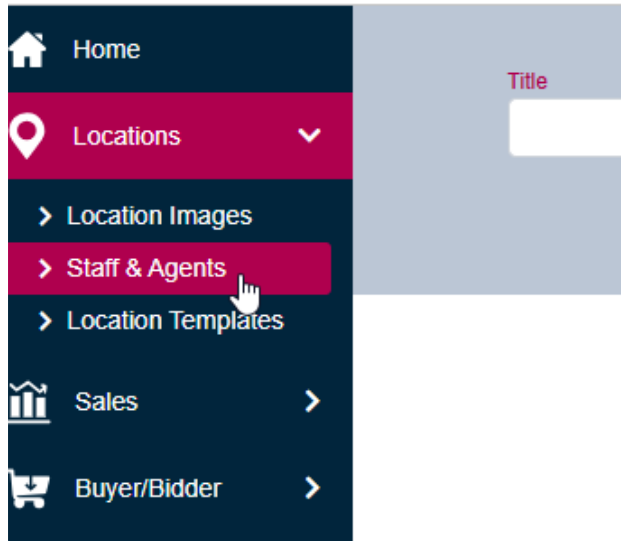
Any Seller.CTBIDS.com user can be associated with one or more locations and have different roles per location.

The role for any current Administrator, Staff, or Agent can be changed at any time and takes effect at the users next sign in.

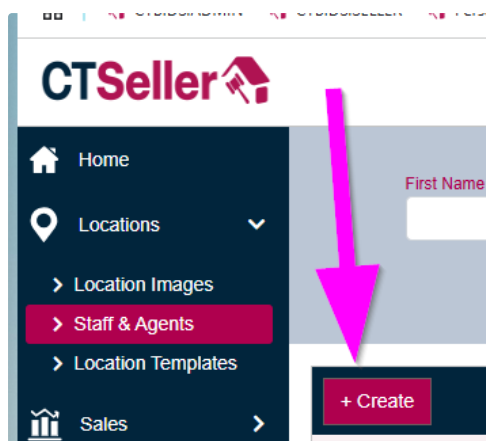
 Staff & Agent Roles do not have the permission to reply to questions from customers from the sale dashboard (after selecting the eyeball icon). Replying to questions is assigned to only the Administrator Role.

To add new staff, agents or Administrators to your location

1. Log into the Seller Site
2. Go to the Locations Tab and select the 'Staff & Agents' sub-tab



3. Select the 'Create' button



4. Please enter all information for the new user into the fields in popup.
- The email entered will be the email that they will use to log into the Seller site and App with.
  - Once you select 'save' an email will be sent to the new staff members email address where they will need to click to verify and create a password. This is time sensitive, so please make your staff aware of this emails so they can take action.

The image shows a registration form with the following fields:

- Location \* (Dropdown menu with "Select Locations" text)
- First Name \*
- Last Name \*
- Email \*
- Retype Email \*
- Mobile \*
- Role \* (Dropdown menu with "Select Role" text)

At the bottom of the form are two buttons: "Cancel" and "Save".

When a person is added to your location through Seller.CTBIDS.com, the form requires you to provide or select the following information:

- **Select Location** - If you are connected to more than one location through your Seller.CTBIDS.com account, you will need to select the appropriate Location for which to assign the new person. If you are connected to only one location, this will default to that location for you.
- **First Name** - Enter the person's first name here. If the person you are adding already has a Seller.CTBIDS.com account, their existing profile name will be retained. If the person is NOT already a user in Seller.CTBIDS.com, then this First Name will be the First name of that user until they change it.
- **Last Name** - Similar to First Name, this will be a new user's last name if their profile does not already exist in Seller.CTBIDS.com.
- **Email** - Enter the person's email address. Seller.CTBIDS.com uses this email to first see if a user exists with this email address in Seller.CTBIDS.com. If it does, the system will use this to connect that person to your location. If the email address is not assigned to a user of Seller.CTBIDS.com, then this email address will be the person's sign in address and will need to be validated before the person can sign in to Seller.CTBIDS.com. In the event the person is a new user, they will receive an email to validate their email account - please see steps below

- **Mobile** - Enter the person's mobile number here. If the person is already a user of Seller.CTBIDS.com, the system will use their current mobile number and will not be changed by this field value.
- **Role** - Select one of the three roles defined above (Administrator, Staff, or Agent).

- i** After information is entered, the employee must set their password via their email
1. The employee must go to their email that was entered in to create their account, and activate their account by setting their password in the link provided in the email
    - a. If the employee does not access their email in the allotted time given, the owner can go in and change their status to 'Active' and the employee should be able to click 'Forgot Password?' button during login to set a new password
  2. Once the password has been set, their account should automatically change to 'Active'
  3. **The staff member does NOT need to create an account with CTBids.com – this is completely separate website, and they only need setup for Seller.CTBids.com**
  4. Please note that you can only edit their role and status once entry is completed
- We do this to ensure that we do not inadvertently activate users with access to our information.

**Please Note: We do not have access to change or delete a password for Employees/Staff/Owners**

- i** If you have an employee who is already in the system because they have worked, or still works, with another location please be sure to enter in the email and phone number that they have already established on the site. They already have a profile setup, you will be adding them to your location with this creation. This staff member will use their existing credentials to sign in.
- For this specific scenario, after you have created them and saved, please click on the pencil icon to open their information and change their status from inactive to active.

**If a new staff member did not act in time to create their password and their link has now expired:**

- Please go back to the Locations Tab
- Select Staff & Agents

- Search them with the filters
  - Click the pencil icon to open their details
  - Select the status dropdown and change them to 'active'
  - The staff member can now select the forgot password option on the Seller site sign in page to be sent a new email to set a password.
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**EXAMPLES of staff members who work at multiple locations:**

Sally is a consultant who works for three different locations - North Caring Transitions Location, South Caring Transitions, and West Caring Transitions. For the North Caring Transitions, Sally helps John, the Owner, with all administrative activities. Sally is added to John's location in the role of "Administrator" so that when Sally signs in to [Seller.CTBIDS.com](https://Seller.CTBIDS.com) she has access to John's location as an Administrator.

Sally also works with Tina, the Owner of South Caring Transitions, as a Sale Processing Consultant. In this capacity, Sally is given the role of "Staff" so she can access all sale management for Tina without accessing Tina's administrative information.

Sally has taken a small part-time job helping Scott process one of his sale by creating items (either via the CTBIDS Seller mobile application or via the [Seller.CTBIDS.com](https://Seller.CTBIDS.com) website). In this case, Scott has added Sally to his location in the role of "Agent".