Add a Guest User

There may be times when you want to provide individuals with temporary access to your brand intranet (e.g. when attempting to recruit a seasoned sales associate). You can do this by adding them as Guest Users in dash.

Fields marked with an asterisk (*) are mandatory.

	1		dash	≡ Home	
			Listings	People Home	
 Click People on the left navigation menu. Click Person. 			Transactions	ADD NEW	
			People	Person < 2	
		*	Brokerage	Team	
		\$-	Franchise Billing	SALES ASSOCIATE	
			Ċ	Business Intelligence	Manage Security Preferences
		۲	ePay		

	Essentials	Positions Profile	Media	Security	Other Review
	FIRST NAME *	SELECT		0	
	MIDDLE NAME				
	LAST NAME *				
	SUFFIX	j Jr	,Sr,III etc.		
	FAMILIAR NAME * PRINTED NAME *		0		
The Add a Person – Essentials	STARTED IN BRAND *	mm/dd/yyyy			
screen displays.	PREVIOUS AFFILIATION				
2. Enter the nergen's information	EMAIL *				
3. Enter the person's information into the appropriate fields.		ADDRESS	ТҮРЕ		
4. Click Positions to go to the			Business 👻	+	
next tab.	PHONE *	NUMBER	ТҮРЕ		
			Mobile -		
			Show Mobile Phone		
			on Profile		
	WEBSITE & SOCIAL MEDIA SITES	WEBSITE URL	ТҮРЕ	LANGUAGE	
			SELECT	▼ SELECT	• X
	Cancel				Positions >>
The Add a Person – Positions screen displays.					
5. Scroll down to the Non-Sales					
Position section.	NON SALES POSITION				
6. In the Position field, search	POSITION Guest Sale		Effective date	SHOW ONI	LINE
for the guest positions using the dropdown list. You can	SELECT -				
select either Guest Non-	- JULCI	· 6			
Sales or Guest Sales position.					
	NON SALES POSITION 🛛 ·······				
7. Click Modify Offices.	POSITION POSITION	Offices	Effective date DEA	CTIVATION DATE SH	HOW ONLINE
	Guest Non-	-Sales Modify Offices]		0

Th	e Select Offices form displays.	
8.	Decide if you would like to grant this Guest User access to the entire company, or select offices.	Select Offices for Position : Guest Non-Sales
	If you choose Entire Company , you will be given the option to select an Effective Date when access will be granted.	Entire Company Effective Date*
	If you choose Select Offices , you will be able to pick specific offices to which you	Select Offices SELECT ALL Use the same Effective Date for all
	want to grant the guest user access. Check the Use the	Pick Office Offices Effective date
	same Effective Date for all	0001 - 419 S Coit Street,
	Offices box if appropriate, or assign a different effective date for each office you assign.	
9.	Click Apply at the bottom of the screen.	
ter wit nu	ote: The Guest User's mination date is prepopulated th a specific date, which is a set mber of days after the Effective ate.	Cancel

10. Click the **Security** tab at the top of the screen. This is where you will assign the person access to your brand intranet site.

NOTE: User ID and Passwords will be emailed to the **Business Email** entered into dash on the Essentials tab.

- 11. Select your brand intranet site from the dropdown menu.
- 12. Click **Manage Role** for each role you would like to assign guest access for the individual.

Essentials 🗸	Positions 🗸	Profile	Media		Security 🗸	Other	}
	-						
APPL	DO NOT SEND LOGIN DETAILS		· 🛻 1	1			
	ROLES	DESCRIPTION		LEVEL	OFFICES		
	Brokerage Admin	Allows users to add, edit, and view i teams. This includes the ability to gr rights to dash and/or the brand ext ability to view franchise fees, updat run all reports available within the o ePay application.	rant, update, or revoke security ranet site. It also allows for the e office marketing information,	Manage Role	None		
	Company Data Entry	An add-on role that allows users to information as well as grant people company level.		Manage Role	None		
	Finance Management	Allows users to view transactions ar role will also have access to the ePa	nd franchise fees. Users with this y application.	Manage Role	None		
	Listing Coordinator	Allows users to add, update, and vie reports. When the listing approval f will also approve all submitted listin	unctionality is enabled, this role	Manage Role	12 _{None}		
	Listing Data Entry	Should only be used when an office workflow functionality. When the fu security role will allow users to sub- existing listings for review and appr This role also has access to listing ro	nctionality is enabled, this mit new listings and updates to oval by the Listing Coordinator.	Manage Role	None		
	Office Manager	Allows users to add, edit, and view 1 teams. This includes the ability to gr rights to dash and/or the brand ext ability to view franchise fees, updat and run ail reports available within not have access to the ePay applica	rant, update, or revoke security ranet site. It also allows for the e office marketing information, the dash system. This role does	Manage Role	None		
	Read Only	Allows users to view listings, transa They will also have access to view th information and run a subset of list will not have access to financial info	e company and office ing reports. The read only role	Manage Role	None		
	Resource Manager	Allows users to add, update, and vie This security role does not allow us rights.		Manage Role	None		
	Resource Manager w/ Security Administr	ation Allows users to add, update, and vie This includes the ability to grant, up dash and/or the brand extranet site	date, or revoke security rights to	Manage Role	None		
	Sales Agent	Allows agents to manage their own to add, update, delete, withdraw an marked as the listing agent. A subse available to users with this security update their own marketing profile specializations, designations, photo	d view listings where they are at of listing reports will also be role as well as the ability to i.i.e. personal profile,	Manage Role	None		
	Sales Agent (read only)	Allows agents to view listings where agent, as well as update their own r profile, specializations, designations reports will also be available for the inventory.	narketing profile; i.e personal s, photo, etc. A subset of listing	Manage Role	None		
	Transaction Coordinator	Allows users to add, update, and vie role will also be able to gup a subset	w transactions. Users with this t of transaction related Brokerage	Manage Role	None		

The **Assign Security Role** window displays.

- 13. Determine if you would like to assign the individual the security role for the entire company, or select offices.
- To assign to select office(s), click to pick the office(s).
 Click Apply.

You will be brought back to the **Security** tab.

		×
•Select Offices 13	cess to any office added in the Future	Remove all
OFFICES 0002 - 332 E. County Road D, St Paul	SELECTED OFFICES 0001 - 7915 Stone Creek Dri, Chanhassen	×
0004 - 11812 Wayzata Blvd.,, Minnetonka		
0008 - 12390 Sherburne Ave, Becker		
0012 - 4600 W. 77th Street,, Edina		
0013 - 324 Broadway Suite 1, Alexandria		
1	4	
Cancel	15	Apply

