STEP-BY-STEP MANUAL

Inviting a Team Member on OLi

Step 1: Log In to Your OLi Account
  - Open your web browser and navigate to the OLi platform.
  - Log in using your credentials (email and password).

Step 2: Access the Dashboard
  - Once logged in, you'll be on the dashboard.
  - Look for the menu bar, and click on "Manage Firm" and then "Client."

Step 3: Invite a Team Member
  - In the Client section, find and click on "Invite Team Member."

Step 4: Enter Team Member Details
  - Input the team member's name and email address.
  - Select the role for the team member (Admin, Partner, Manager, Staff, Contractor).
     - **Admin:** Similar authority as the owner, overseeing almost everything.
     - **Partner:** Authority limited to assigned tasks.
     - **Manager:** Similar authority as a partner but with the ability to delete or retrieve tasks.
     - **Staff:** Limited to assigned tasks and cannot delete or retrieve anything.
     - **Contractor:** Similar authority as a partner but only for assigned tasks.
  Example
  - Enter "Jimy Santos" as a staff member.

Step 5: Send Invitation
  - Click the "Invite" button.
  - The team member (Jimy Santos) will receive an email with the subject "Invitation to Join [Firm Name]."
  - The email will include the team member's email address and a temporary password.

Step 6: Team Member Acceptance
  - Jimy Santos should open the email and use the provided temporary password to log in.
  - Upon logging in, the system will prompt Jimy Santos to change the password.

Step 7: Login Confirmation
  - To confirm the team member's successful login, try using the login credentials provided (email and new password).
  - Access the platform using the email address (e.g., support99.com) and the updated password.

Step 8: Change Password (Recommended)
  - Once logged in, it is advisable for Jimy Santos to change the temporary password for security reasons.

Step 9: Contact Support for Questions
  - If there are any questions or issues, users can contact OLi's support team at support@oli.com.ph.

Step 10: Conclusion
  - Congratulations! You have successfully invited a team member to your OLi platform.
  - Explore more features and functionalities in upcoming training videos.

Note: Ensure that team members follow security protocols, including changing temporary passwords, to maintain the integrity of the OLi platform.