



Company dashboard and inviting your team

The company dashboard and how to invite users.

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04

Know your company dashboard

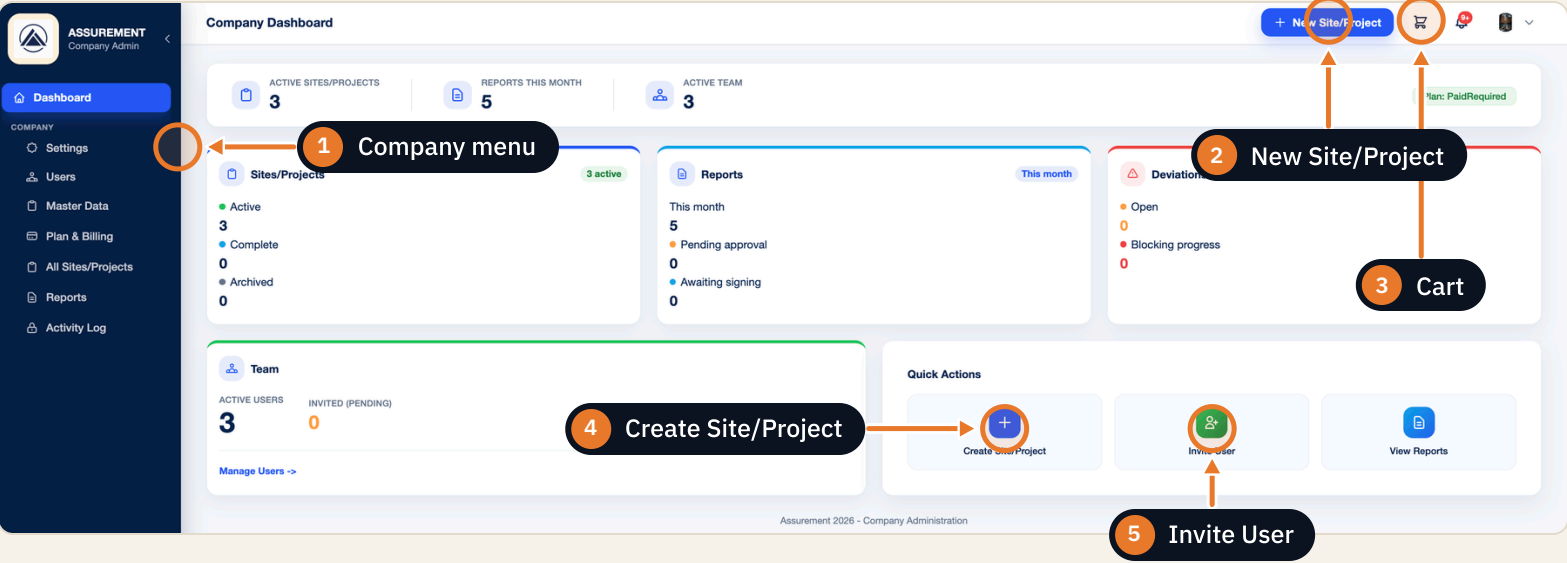
R1 Company admin Dashboard

Your home screen as company admin. Everything you own is one click away from here.

- 1 **Company menu**
Settings, Users, Master Data, Plan & Billing, All Sites/Projects, Reports and Activity Log.
- 2 **New Site/Project**
Starts the site wizard in chapter 5. It is always in the top bar.
- 3 **Cart**
Shows reports waiting to be paid. See chapter 13.
- 4 **Quick actions**
Create Site/Project does the same as the top button.
- 5 **Invite User**
Invite your project managers (R2) and field users (R5) now, before you create a site.

GOOD TO KNOW
Colleagues must have an account before you can pick them as participants in step 3 of the site wizard.

NEXT
Invite your team first. Next page. →



Invite your team

R1 Company admin Company menu > Users > Invite User

User Management lists everyone in the company. Invite colleagues and stakeholders from here, before you create a site.

- 1 **Open Users**
In the company menu on the left.
- 2 **Click Invite User**
The invite window opens.
- 3 **Invite type**
Internal for colleagues such as project managers (R2) and field users (R5). External for stakeholders outside the company.
- 4 **Stakeholder type**
For external users only, for example C22 Advisor.
- 5 **Access permissions**
Read is always on: view only. Communicate: write in the communication notes. Register: do tasks in the mobile app.
- 6 **First name, last name, email**
The invitation goes to this email.
- 7 **Click Send Invitation**
The user shows as Invited until they accept.

GOOD TO KNOW
The invitation is valid for 24 hours.

NEXT
Click New Site/Project to create your first site. Chapter 5. →

