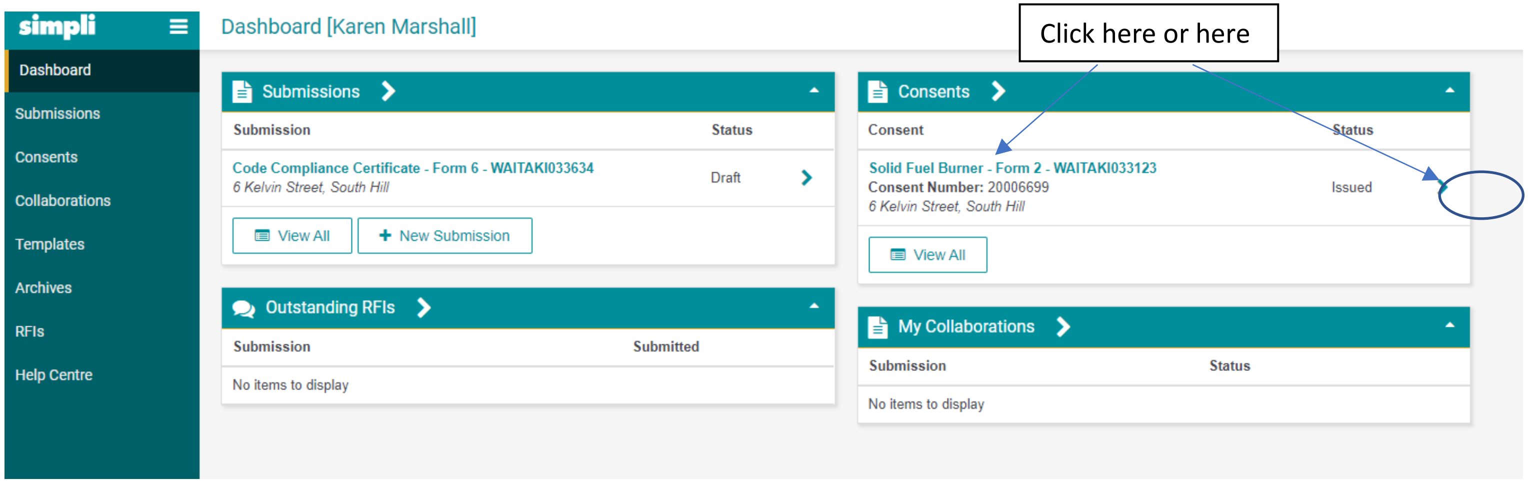
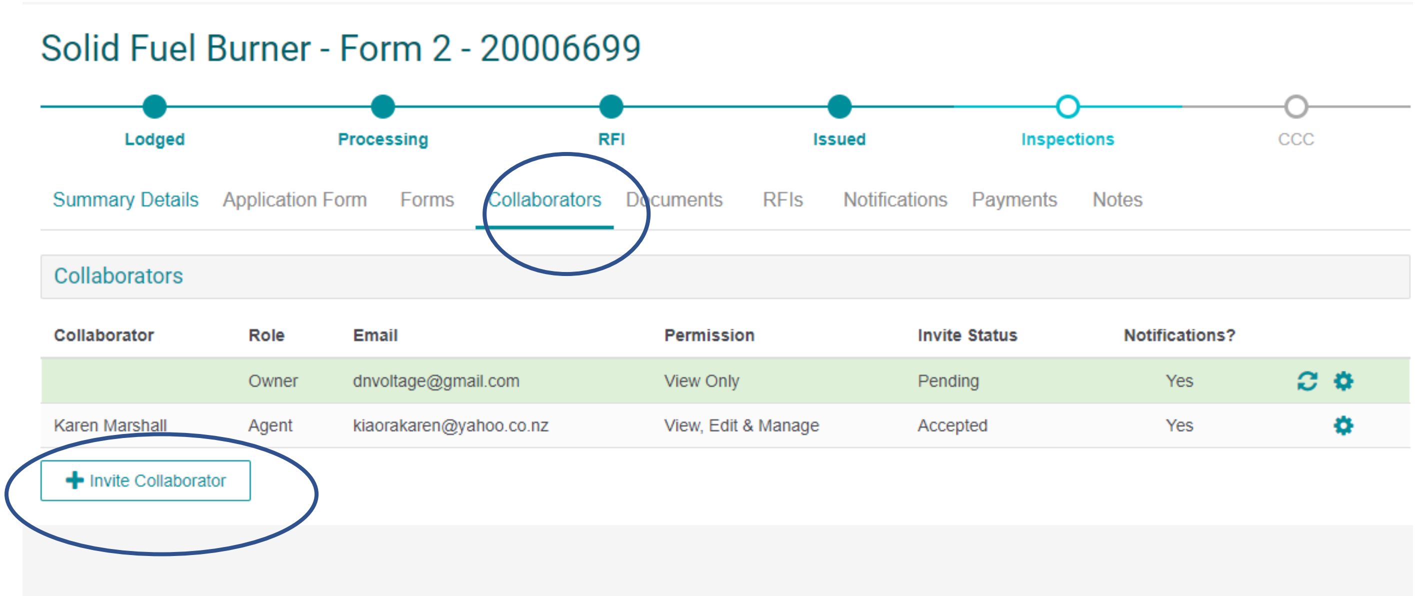
How to add a Collaborator as a customer:

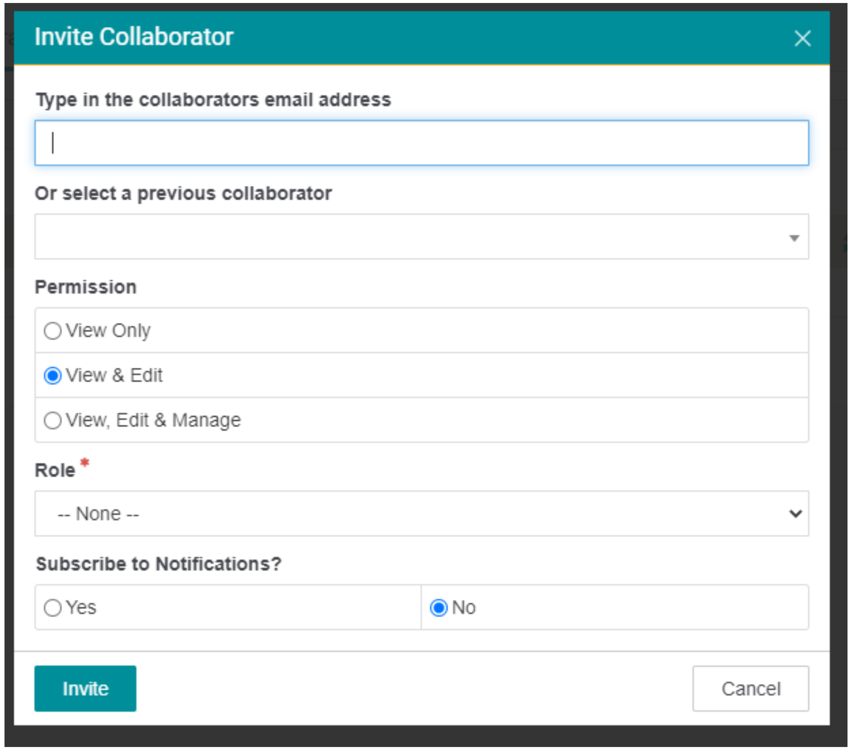
1. Open consent from the dashboard when logged in:



2. Click on “Collaborators”
3. Click on “Invite Collaborator”



4. Fill in details: - If you require the collaborator to be able to upload documents, they will need to be able to “Edit”.



They will then receive an email inviting them to be a collaborator and will need to accept this invitation (including registering to Simpli, if they have not previously).

If someone has previously been invited, but they have not accepted yet, the invite status will show as “pending” and this invitation can be resent:

Invite Status	Notifications?
Pending	Yes
Accepted	Yes