

How to add a Collaborator as a customer:

1. Open consent from the dashboard when logged in:

The screenshot shows the Simpli dashboard for user Karen Marshall. The 'Consents' section is active, displaying a table with one consent entry: 'Solid Fuel Burner - Form 2 - WAITAKI033123' with status 'Issued'. A callout box 'Click here or here' has arrows pointing to the 'Consent' header and the 'Status' column. The 'Collaborators' section below it is empty.

2. Click on "Collaborators"
3. Click on "Invite Collaborator"

Solid Fuel Burner - Form 2 - 20006699

The screenshot shows the application details page for 'Solid Fuel Burner - Form 2 - 20006699'. The progress bar indicates the application is in the 'RFI' stage. The 'Collaborators' tab is selected and circled. The table below shows the following data:

Collaborator	Role	Email	Permission	Invite Status	Notifications?
dnvoltage@gmail.com	Owner	dnvoltage@gmail.com	View Only	Pending	Yes
Karen Marshall	Agent	kiaorakaren@yahoo.co.nz	View, Edit & Manage	Accepted	Yes

The '+ Invite Collaborator' button is circled in blue.

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

Invite Collaborator [X]

Type in the collaborators email address

Or select a previous collaborator

Permission

View Only

View & Edit

View, Edit & Manage

Role *

-- None --



Subscribe to Notifications?

Yes No

Invite **Cancel**

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	