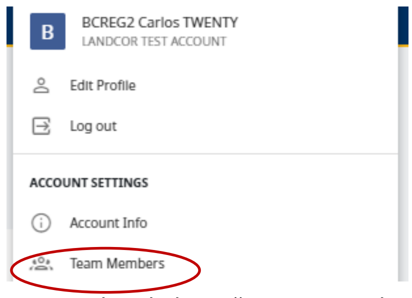
Getting Started – Add Team Members to your Account

You can add team members to your account, so they have access to the business(es) or other Registry services your team manages.

Depending on what you want the person to do, there are three different roles that can be assigned. By default, the person creating the account is the **Account Administrator**.

Step 1: Create an account

Once you have [setup an account](), you can add team member(s).



Step 2: Invite team members

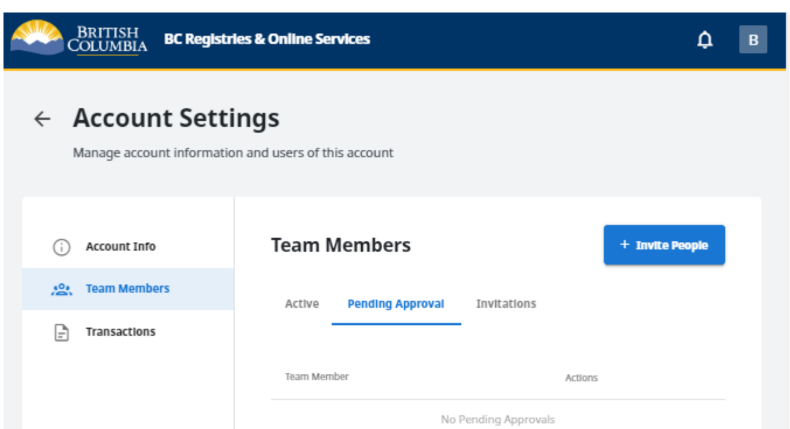
Team members can be added immediately after the account is setup or you can complete this step anytime, by clicking "Team Members" from account settings. The login method for 'Users' and 'Coordinators' can be Mobile BC Services Card or a BCeID and 2-Factor-Authentication and can be changed by the Account Administrator from the "Authentication" tab.

Step 3: Team member accepts invite

The **team member** will receive an email asking them to join the team. They will click the link in the email and then login to complete the process.

Step 4: Approve team members

The **Account Administrator** or **Account Coordinator** will perform a final approval, from the "Pending Approval" tab. Once approved, team members can login with their Mobile BC Services Card.



Role Definitions

Account Administrator

- Highest level of access with the ability to setup the account,
- update payment methods,
- view/edit financial statements,
- add/remove team members,
- add/remove businesses.
- Each account must have at least one Account Administrator.

Account Coordinators

- Add/remove all team members except for Account Administrators,
- add/remove businesses.
- view/edit financial statements.

Users

- Ability to search and complete filings,
- add/remove businesses.

How do I setup an account?

[Learn more here.]()

What is a Mobile BC Services Card?

Go to: https://www2.gov.bc.ca/gov/content/governments/government-id/bc-services-card/log-in-with-card/mobile-card

*Steps can be completed by an **Account Administrator** or **Account Coordinator**.

Considerations

Roles

- We suggest that more than one **Account Administrator** be added to the team to share responsibility and provide coverage in case of illness, vacation, etc., but remember this Account Administrator has full access to do everything!
    - Note: For accounts using notarized identity affidavit, BCeID and 2-Factor Authentication, there may only be <u>one</u> Account Administrator on file.
- Any person can leave the team, at anytime.
- Before you leave the team, appoint new team members.
- At least one **Account Administrator** is needed on the account at all times. The system will not let you leave the account if you are the only **Account Administrator** on the team. You will need to appoint a new **Account Administrator** before you leave.
- **Account Administrators** can remove **Account Coordinators** but **Account Coordinators** cannot remove **Account Administrators**.

Notifications

- Notifications are instant and should be received almost immediately. If you do not receive a notification, check your spam folder or ask the **Account Administrator** or **Account Coordinator** to check that they entered the correct email address.