## **Delegating Access to Additional Users**

For Property Managers to add additional users to help manage properties, please follow the steps below to delegate access to additional users for your online account.

1. Once you are signed into your account, click 'Account' at the top of the screen, then select 'Portfolios'. Please note: before you can invite a user you must create a new portfolio.

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2. Click 'Add Portfolio' in the top right-hand corner.

3. Enter a personalized portfolio name. Select the portfolio from the dropdown list. Select the accounts you would like to add, then click 'Create'.

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4. You will receive a message that your portfolio has been successfully created.

5. Click 'Account' at the top of the screen, then select 'Manage Users'.

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6. Click 'Invite User' in the top right-hand corner.

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7. Enter the invited user's name and email address. Select the portfolio from the dropdown list and select the invited user's role.

- You can select a date you would like their access to expire. Leave blank if there is no expiration date.
- If the invited user will be supporting more than one portfolio, click 'Add Additional Portfolios'.

Click 'Invite'.

Invite user	×
Invite a user to access to manage accounts on your behalf.	
First Name	
Last Name	
Email Address	
Portfolio	¥
Role	¥
Access Until -/-/	×
Add Additional Portfolios	
Cancel	

8. You will receive a message that you have successfully sent the invitation. The invitation link will expire in 7 days. If the user does not accept it within that time frame, you will need to re-invite the.