suralink

PRODUCT CHEAT SHEET

Team Page Update

Team Page Update

The Team Page has a new look but the same functionality. This cheat sheet will allow you to quickly get familiar with the new layout.

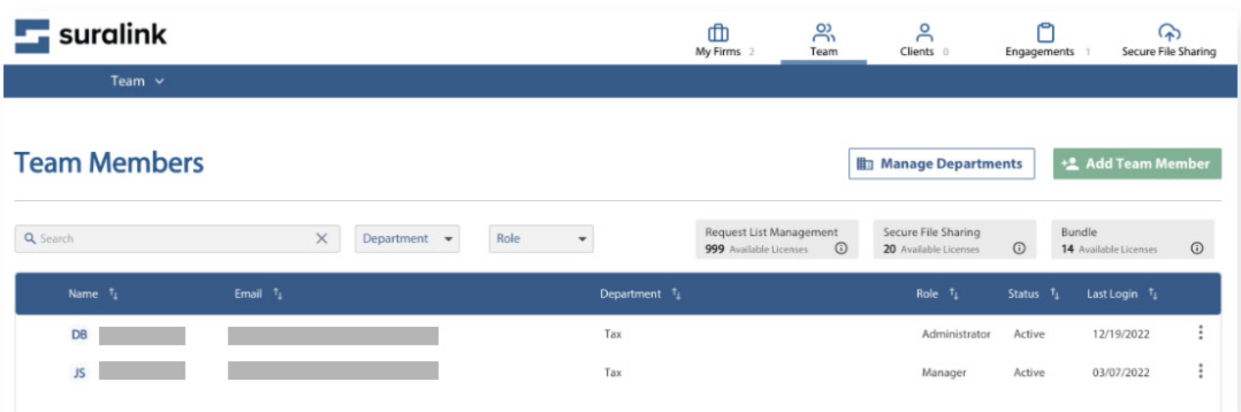
Goals

- Make the team page more scalable as your firm grows.
- Provide a more intuitive design.
- Improve performance and responsiveness.

Changes

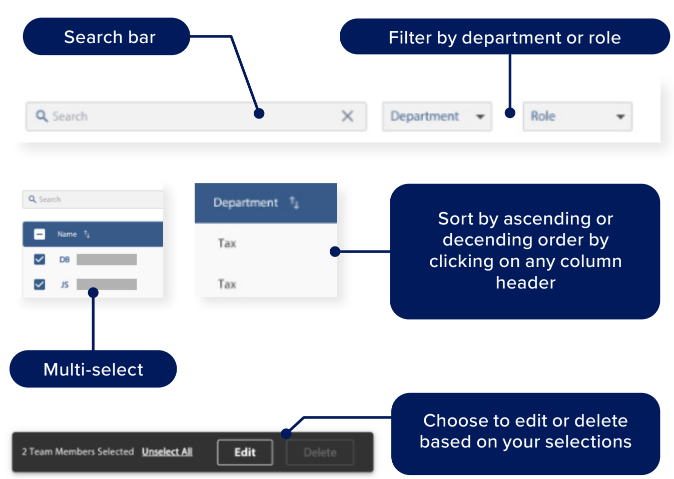
Grouping

The list shows all users in the table. Department is part of the table and can be used to sort and organize the data.



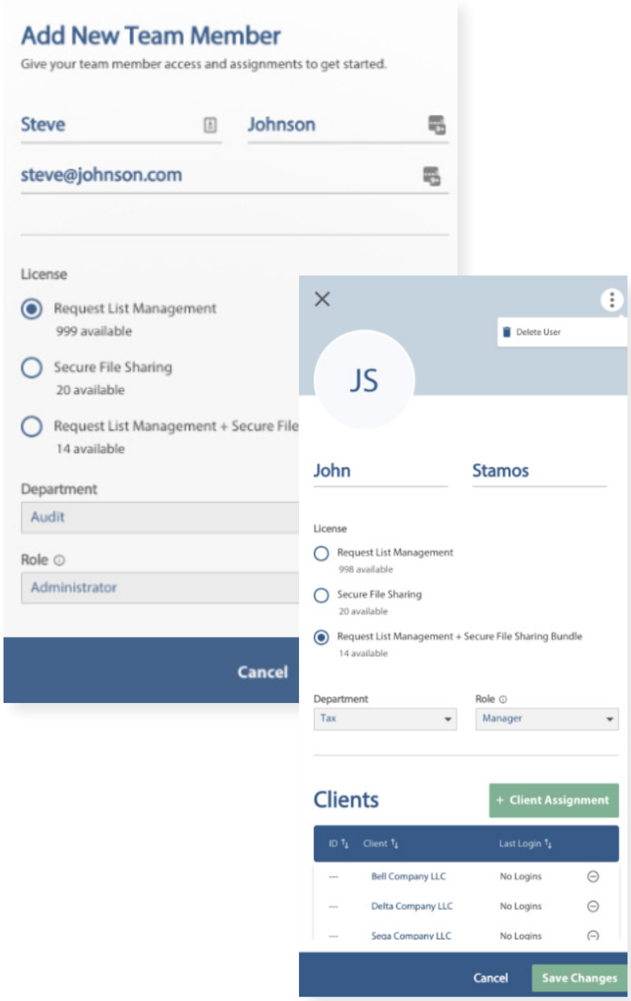
Search & Filtering

- **Search:** Search is faster and more responsive thanks to optimization.
- **Filter:** Filtering by department(s) in addition to role(s) is now available. You can also multi-select.
- **Sort:** is now available by column. Ascending or descending sorting by Name, Email, Department, Role, Status, and Last Login.



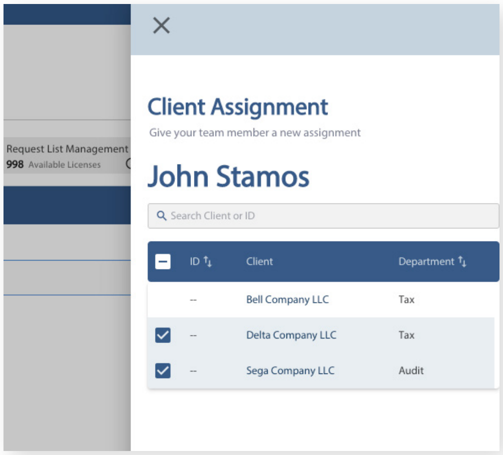
Add New Team Member & Edit Existing Team Member

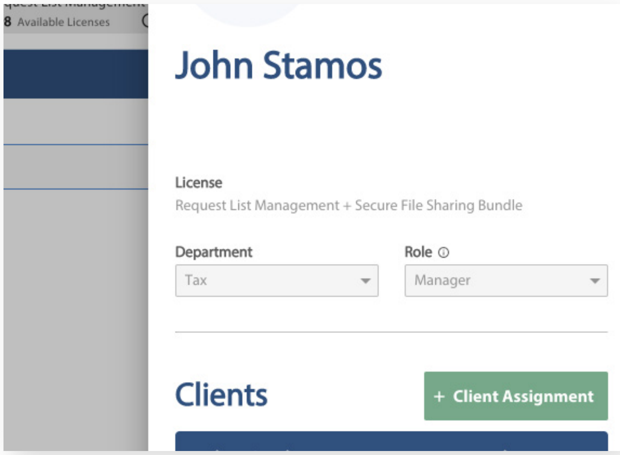
- **Add Team Member:** Button is still in the upper right but will open up a side panel instead of a new window.
- **Edit Team Member:** Click on the user record or the menu next to the last login date to edit a team member. You can also choose to edit multiple by selecting boxes to the left of the name column.
- A panel will appear where you can quickly adjust the user license type, department, role, and adjust client assignments.
- **Removing Team Member:** Select the box next to user(s), and the option to delete or edit will appear at the bottom. You can also click directly on the user record and use the menu in the upper right of the panel. By using multi-select you can remove multiple members at once.



Assigning Team Members

Click on the team member record and the panel appears on the right. Click on "+ Client Assign-ments" to assign new clients. To remove assignments, click on the minus icon on the client row within the panel. You can also sort the list of client assignments by columns.



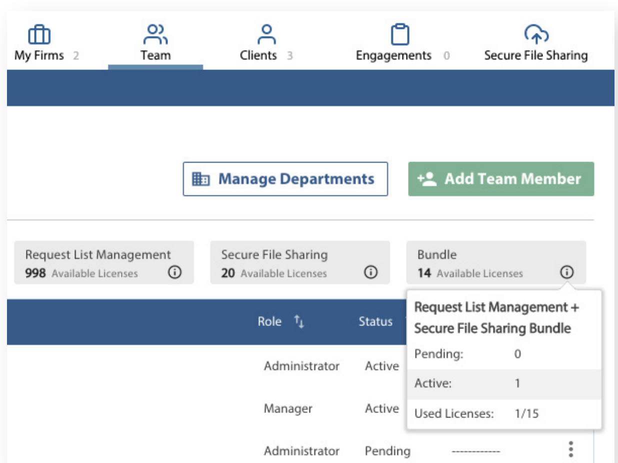


Resend Invitations

Click on the team member record showing as pending and the panel will appear where you can resend or copy the invitation link.

Licenses

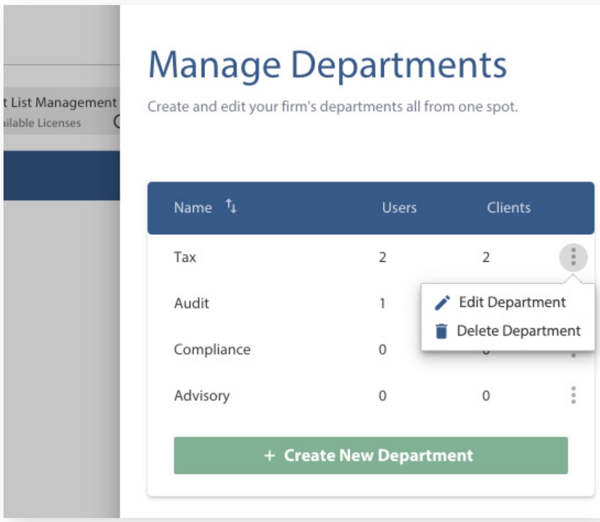
The breakout of licenses appears at the top right of the page. You can see the number of available licenses. Hovering over the tool tip lets you know pending, active, and used licenses.

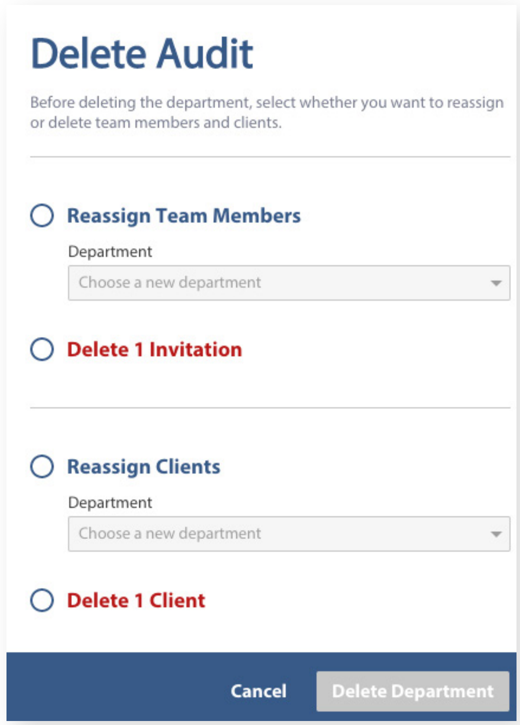


Manage Departments

Click to “Manage Departments” in the upper right. You get a panel with a list of all departments where you can create departments at the bottom or use the menu to edit or delete. Sorting is also available by the name column. Users and Clients are also broken out.

- **Deleting and Reassigning:** You continue to make edits in the panel for reassigning team members or deleting them.





For more information on the Team Page Update, contact our support team via live chat or email support@suralink.com