

# **Beyond Psychology Website Team Leader Guide**

V1.0

## Introduction

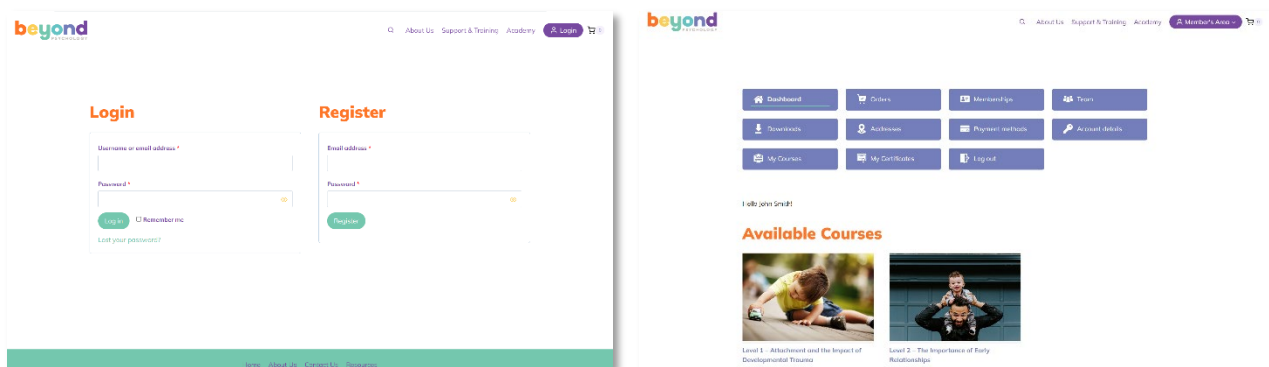
This guide is for Team Leaders (e.g. Project Leads, Head of NHS Districts, etc). As a Team Leader you can manage the seats that have been allocated to your organisation.

In this guide you will find details of how to add and remove team members renew your organisation’s membership at the end of the membership period.

## Logging In

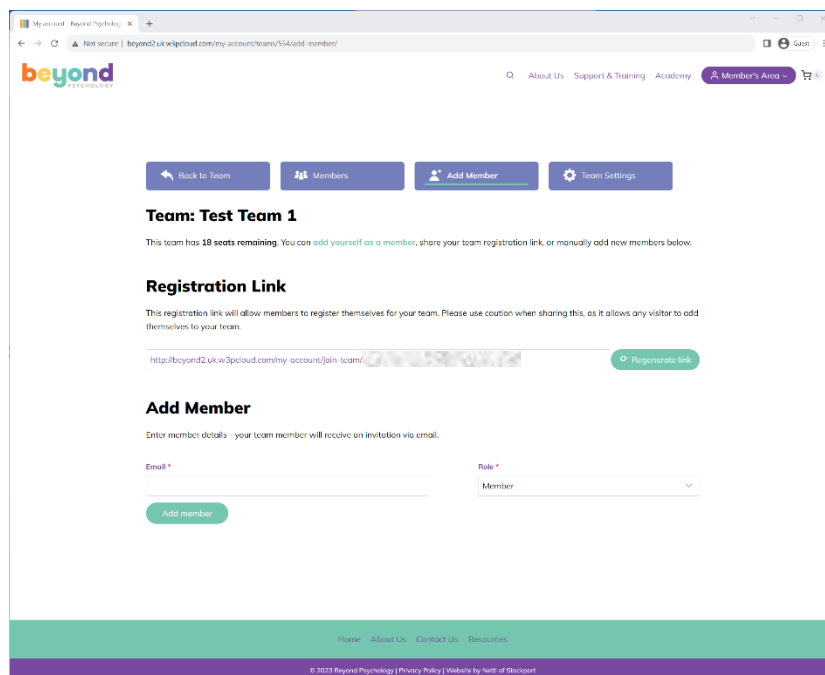
Click the Login button on the top right and enter your email address and password. If you need to reset your password click the Lost Your Password link.

After logging in you will see your Dashboard page. This is your portal to the website.



## Adding Team Members

To add new team members go to your Dashboard and then navigate to Team > Add Team Member



You now have 2 options for adding team members.

### Option 1: Registration Link

This method is recommended if you need to invite members in bulk.

Copy the registration link and paste it into an email. Add the email addresses of the people you need to invite (or a group email address if your organization has one). Ask your team to click the link to join your team.

Note: anyone with the registration URL will be able to join the team and take up a seat. If you need to change the registration link then click the Regenerate Link button. The previous link will then become invalid.

When your invitees click the link they will be asked to register. Once successfully registered they will have access to the courses in your plan.

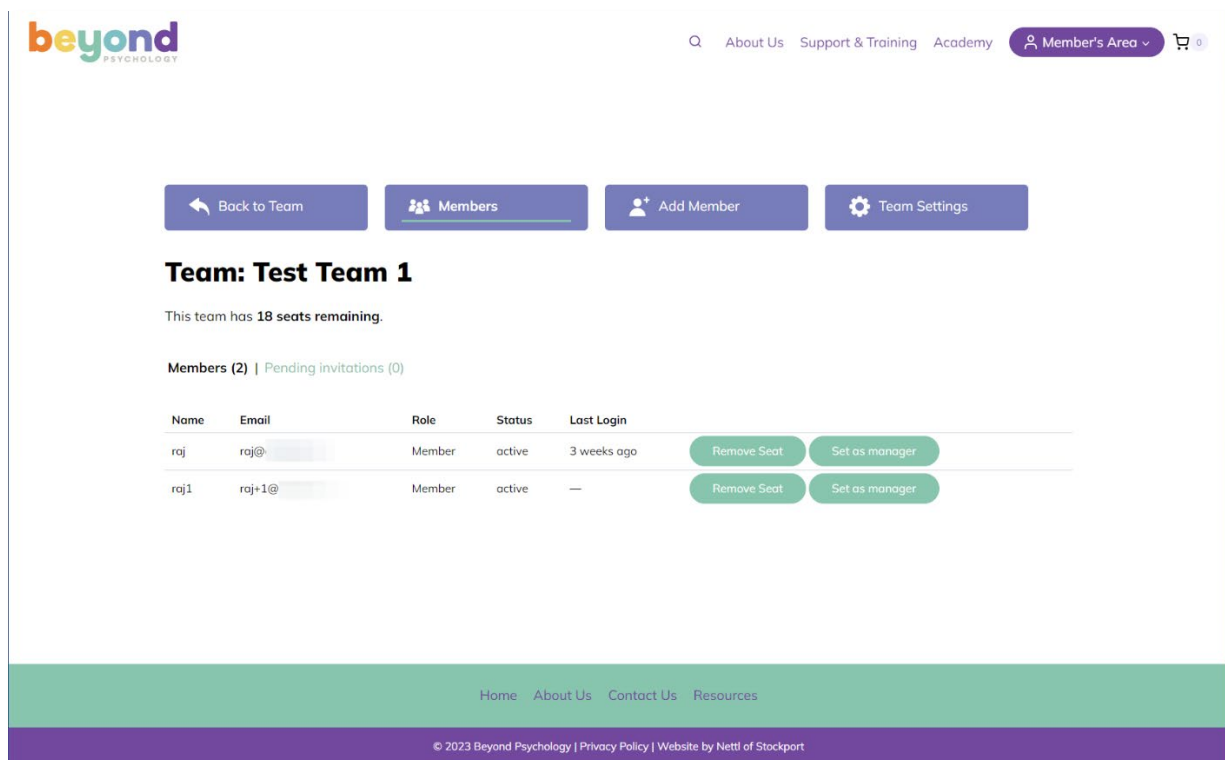
### Option 2: Add members individually.

You can invite members individually by entering their email address and clicking the Add Member button. If you would like to allow a member to be able to add other people (e.g. sub team leaders), then set their role to Manager.

Each person you invite will receive an email with a registration link.

## View and remove Team Members

To view members who have joined your team go to your Dashboard and then navigate to Team > Members

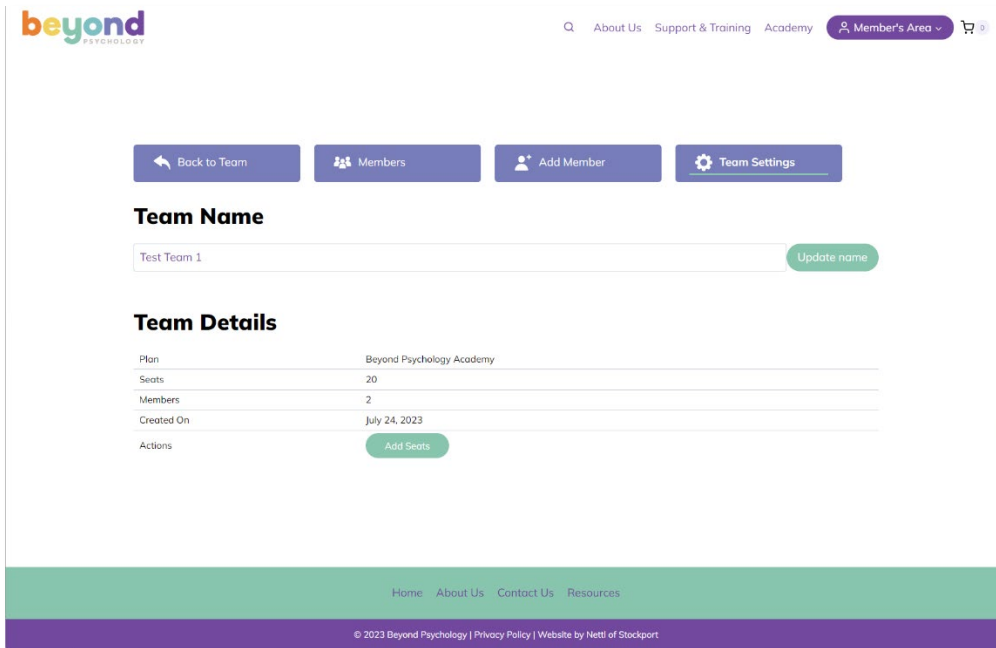


From this screen you can:

- **Remove Seat** : remove the member from your team. Note: This does **not** add the seat back to your allocation. Seats are single-use only. Once a seat has been allocated it cannot be reallocated to another user. However you should remove members that are no longer required before renewing your team subscription.
- **Set as Manager**: You can set individual members as Managers so that they can add other members if required. You can also change Managers back to regular Members.

## Change Team Name

To change the name of your Team go to your Dashboard and navigate to Team > Team Settings

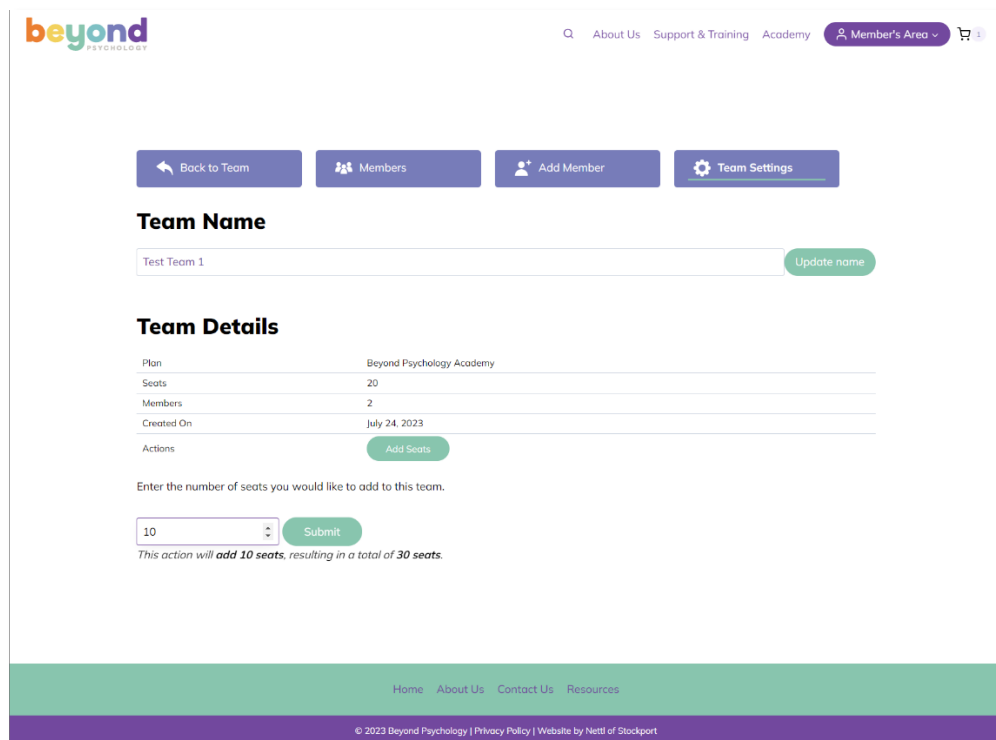


Enter the new Team Name and click the Update Name button.

## Add Seats

If you need more seats for your organisation go to the Dashboard and navigate to Teams> Team Settings

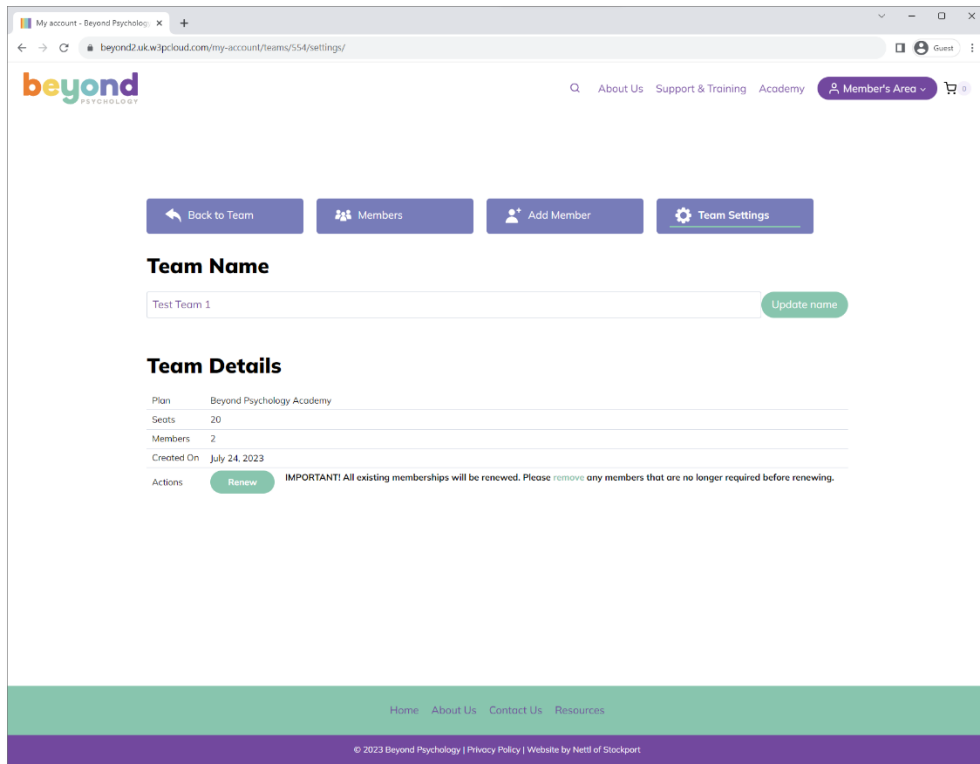
Click the Add Seats button and enter the number of new seats you require. Click the Submit button and complete the checkout process.



## Renew Plan

When your Plan expires you will need to renew in order to allocate new seats.

To renew your plan go to the Dashboard and navigate to Teams > Team Settings



**IMPORTANT: You must remove any members that are no longer required before renewing your plan. Any existing members will be included in the renewal.**

Click the Renew button and follow the checkout process to complete your plan renewal.

## Questions and Support

If you have any questions, please contact your Beyond Psychology account manager or email [support@beyondpsychology.co.uk](mailto:support@beyondpsychology.co.uk).