# HOW TO ADD A HELPER
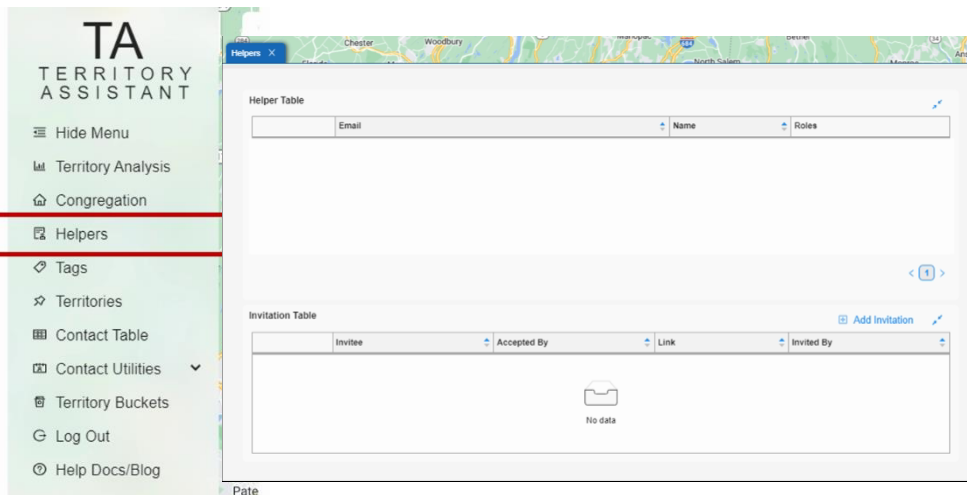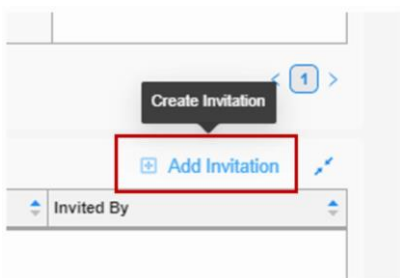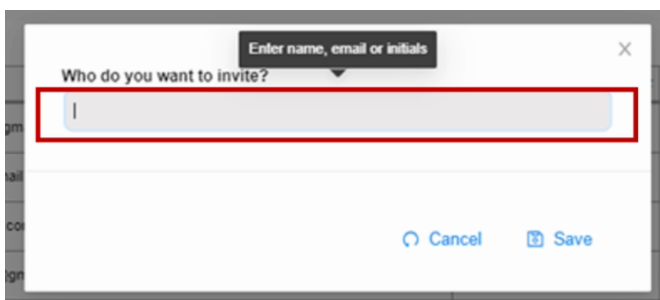
**STEP 1**: **Click Helpers** on the right and the "Helpers" window opens.
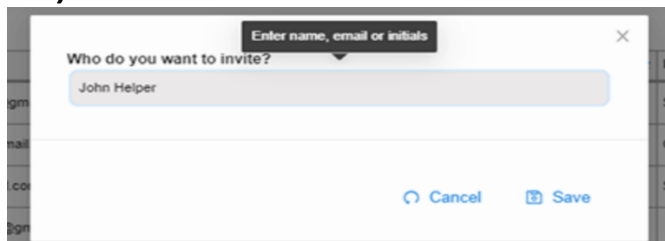


**STEP 2**: **Click Add Invitation** above the Invitation Table.



**STEP 3**: **Enter the name, email address, or initials** of the Publisher you wish to invite and then click **Save**.
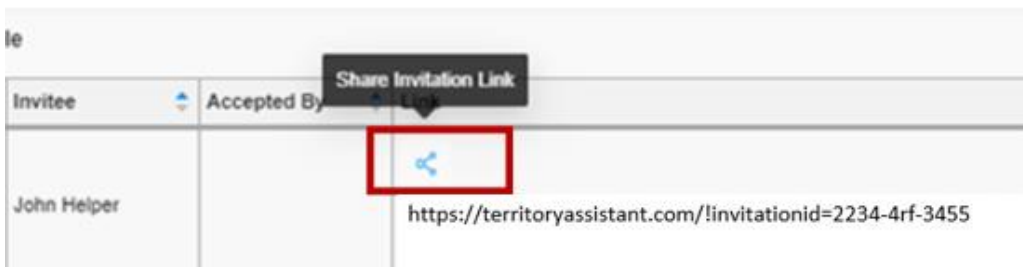


*NOTE: It is not advised to use full names of Publishers. The name below is used only to make this example easier to follow/learn.*

An Invitation Link is created in the **Link** column.  It is entered into the Invitation Table so you can send it to the Publisher.



**STEP 4**: **Click** the **Share Invitation Link** icon to copy/email/or phone link the invitation.



**STEP 5**: A window appears where you can select to Copy/Email/Phone Link the invitation.  **Click Copy link** and the Invitation Link is copied into your device's memory.

The "Copy link" is the easiest way to send the Invitation Link.  These instructions explain how to use the "Copy link" method.

*Mail and Phone Link must be set up on your device for it to be able to be used.  If you click Mail and your mail has been set up on your computer, the associated mail app should open.*
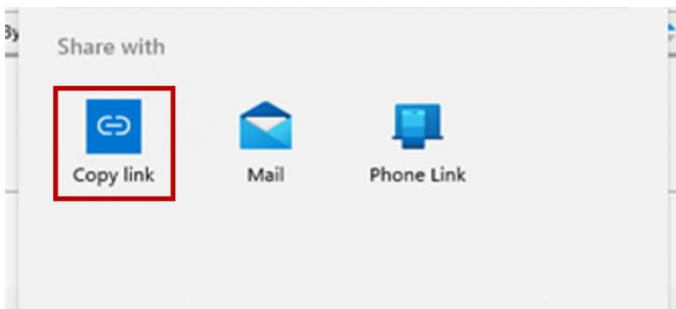


**STEP 6**: **Open** your email app and **paste** the Invitation Link into the body of the email.  **Send** the email to the Publisher you wish to become a Helper for territory management in Territory Assistant.
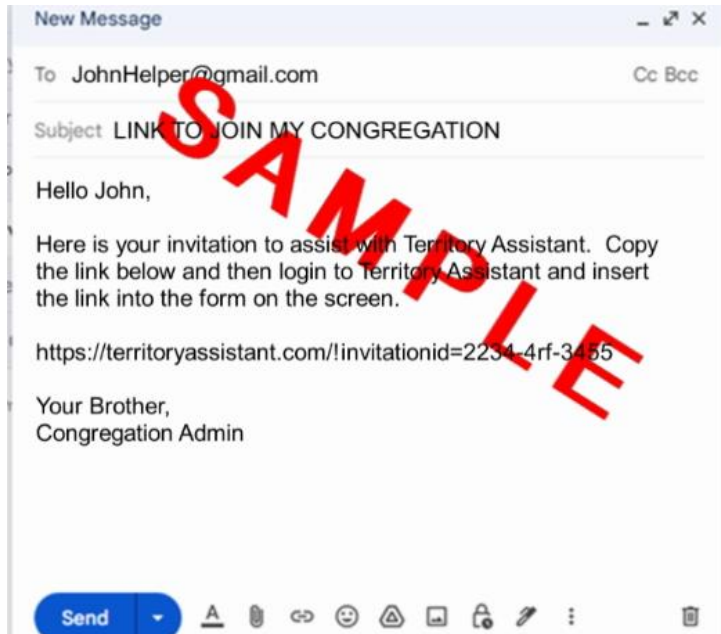
Once the Publisher has received the email and accepted it, continue to step 7.

*NOTE:  See the section below for "**HOW A HELPER ACCEPTS THE INVITATION**"*

**STEP 7**: When the Invitation Link has been successfully accepted, you will see "Approve" on the Invitation Table and the email address of the person who accepted the Invitation Link (in the **Accepted By** column).

*Double check the email address to be sure*

*it is the Publisher you wish to approve as a Helper.*
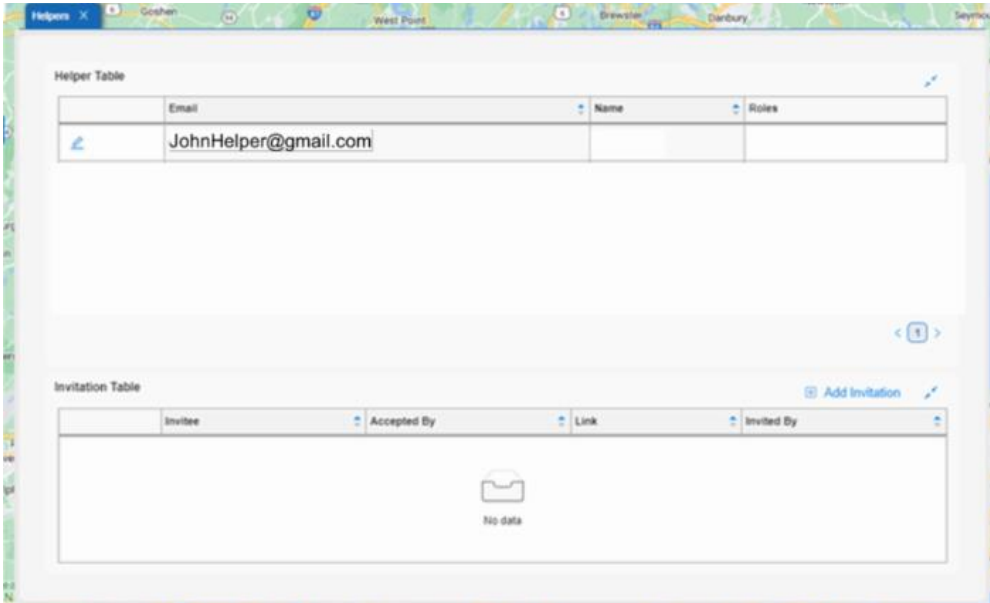
**Click Approve** to accept the Publisher as a Helper.



**STEP 8**: The Publisher is now an **approved Helper** and is moved to the **Helper Table** at the top of the window.

The Helper should **now be set up** to assist with territory management in Territory Assistant.



***NOTE:  The edit icon in the far left of the Helper Table allows for Roles to be assigned to Helpers.  As of the date of this document, the Roles function is under development.***

Please *keep checking* the Help Docs/BLOG for further information on Territory Assistant Helper Roles.

## HOW A PUBLISHER ACCEPTS THE INVITATION

**STEP 1**: Once the Publisher receives the Invitation Link, they will need to accept the invitation from within Territory Assistant. The Publisher can start this process in one of the following ways:

1- the Publisher can **click on the link in the email**
2- the Publisher can **copy/paste** the link from the email **into their web browser**
3- the Publisher can **copy** the link from the email and then **login** to Territory Assistant

**STEP 2**: **Paste** the link in the **Enter Invitation Link or Invitation ID** field in Territory Assistant.

**STEP 3**: Click **Accept Invitation**.
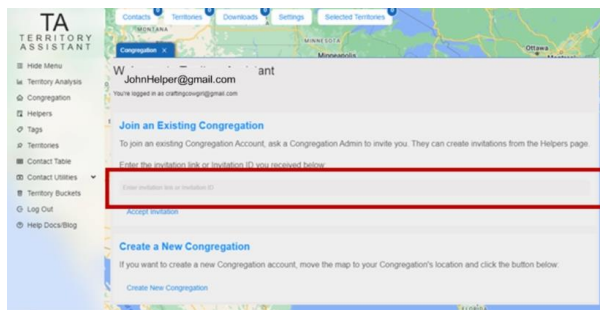


*NOTE: The entire link copied will not be pasted. Only the portion of the link that is needed will be seen.*
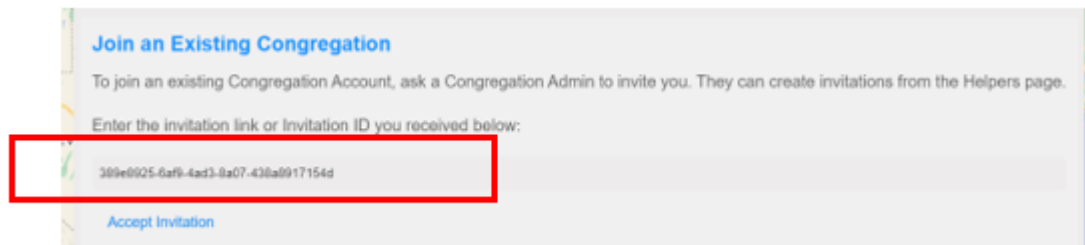


The Publisher is notified by Territory Assistant that their approval is pending. The Congregation Admin will see that the link has been accepted. However, the Publisher should tell the Congregation Admin Invitation Link has been accepted.
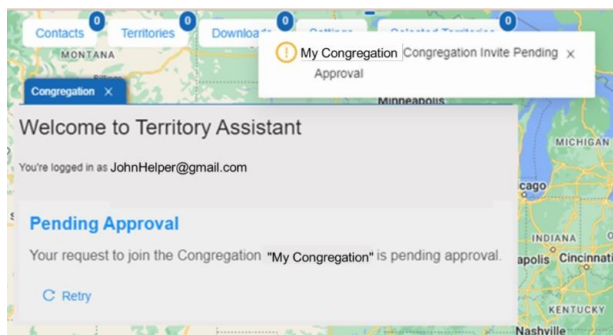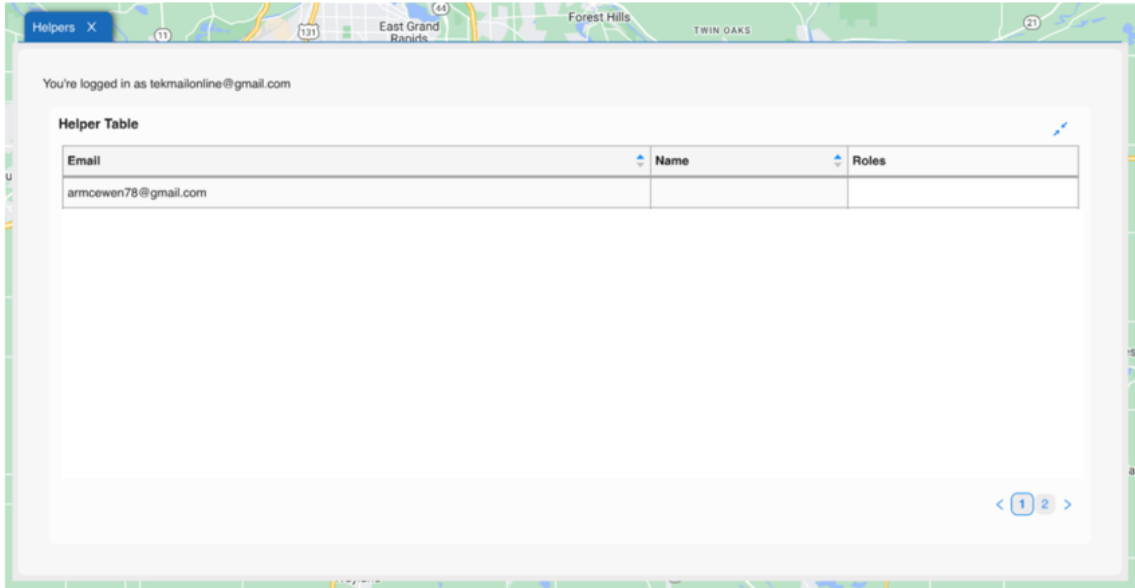
# HOW TO ADD A HELPER

Once the Congregation Admin approves the Publisher, the Publisher becomes a Helper.



*[End of document]*