

User Guide How to Create a Staff Group

Introduction

A referral form can be assigned to a staff member or a staff group. This guide will show you how to create a staff group. Only users with administrative rights can create staff groups.

Instructions

1. To create a staff group, navigate to the 'Forms' section.





2. Click on the 'Groups' button.



3. Click 'Add' and enter a group name.

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4. Click 'OK' to add the group to the staff group list.



5. Select the staff members that you would like to add to the group.



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6. Click 'Close' to complete the process.



7. Alternatively, you can click on the 'Assign' button.





8. Select 'Staff Group'.

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9. Click on the 'Groups' button and follow the same steps.

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Support

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Training



0800 028 0004 (option 2)

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