

How to add secondary account in different department in TaBS

1) Go to setting, then click 'Users' and click 'add new record'.

Tips: Can use duplicate function to create additional account.

2) Link to account together. This has to be done on both old and new accounts.

Tips: Define the name by prefix name, email and login with any indicative like [secondary].

The screenshot shows the TaBS user management interface. The top navigation bar includes: Dashboard, Clients, Credentials, NonClients, Opportunities, Engagements, Timesheets, Expenses, Employees, myPerformance, Billings, Receipts, Calendar, Reports, myPlanner, Newsletter, CSS. Below this is a 'Xero menu events' section. The left sidebar has a 'Users' menu with sub-items: Activities, Login Log, Online, Profiles, and Users. The main content area is titled 'Harry Yong' and contains a form with the following fields: Login (harry.yong@YOURCOMPANY.com), Status (Active/Inactive), Account type (admin), First name (Harry), Last name (Yong), E-mail (harry.yong@YOURCOMPANY.com), GTI User, Abbr (Harry), Nickname (Harry), Profile (Finance - Harry), Legal Entity (DEF), Department (Central), Level (Administrative Staff), Coach (John Lee), Receive coaching (yes/no), and Personal Notes. Below the form is a tabbed interface with 'Account Links' selected. It shows a list of accounts linked to the user, including 'ABC' (Audit, SSC India, SSC Indonesia, SSC Malaysia) and 'DEF' (Audit, BRS, [secondary account] Harry Yong (Harry), Emily Wong (Emily), Mary Flores (Mary)). The 'Account Links' tab is highlighted with a red box, and the '[secondary account] Harry Yong (Harry)' entry is also highlighted with a red box.

3) After link on both accounts. Switch profile to secondary account by switch icon on top of screen.

The screenshot shows the top navigation bar of the TaBS interface. It includes a 'quick search' bar, a settings icon, a star icon, a calendar icon, a clock icon, a user icon, a time display (00:00:00), a 'switch profile' icon (highlighted with a red box), and a 'system account' button. A tooltip for the 'switch profile' icon shows the text 'switch profile' and '[secondary account] Harry Yong (Harry)'. Below the navigation bar, the top of the main content area is visible, showing the same navigation bar as in the previous screenshot.

3.1) In order to not count this secondary account for license, make sure that secondary account is set as **admin** account.

Users

Activities

Login Log

Online

Profiles

Users

Organization

Data Definition

Activities

Translations

Other

Processes

Business Engagement Process

People Assessment

Opportunities

Harry Yong

Login:

harry.yong@YOURCOMPANY.com

Status:

☒ Active
 ☐ Inactive

Account type:

admin

First name:

Harry

Last name:

Yong

E-mail:

harry.yong@YOURCOMPANY.com

GTI User:

Abbr:

Harry

Nickname:

Harry

Profile:

Finance - Harry

Legal Entity:

DEF

Department:

Central

Level:

Administrative Staff

Coach:

John Lee

Receive coaching:

☒ yes
 ☐ no

Personal Notes:

Subordinates

Timesheets

Salary/benefits

Personal

HR

Account Links

3.2) Review time reporting requirements (if it is fee earner), **set it to 0** for secondary account. That will prevent emails with missing wip etc.

Subordinates

Timesheets

Salary/benefits

Personal

HR

Account Links

Require WIP verification:

☐ yes
 ☒ no

Timesheets Reporting Target

Weekdays:

Saturday:

Report Timesheets for

0 hrs/day

0.00 hrs/day