How to add secondary account in different department in TaBS

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

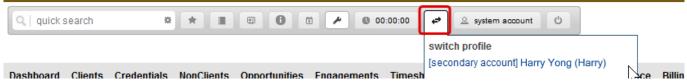
Tips: Can use duplicate function to create additional account.

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].

| Dashboard Clients Credentials Non | Clients Opportunit | ies Engagem | ents Timesh | eets Expens | es Employees | myPerformanc | e Billings | Receipts | Calendar | Reports | myPlanner | Newslette | r CSS | 1 |
|--|---|-------------|-------------|-------------|--------------|--------------|------------|----------|----------|---------|--------------|-----------|-------|---|
| Xero menu events | | | | | | | | | | | | | | |
| Users Activities | Harry Yong | g | | | | | | | | | # % : | 🇟 🔚 🕈 | E 3 |] |
| Activities Login Log Online Profiles Users + Organization + Data Definition + Activities + Translations + Other + Processes + Business Engagement Process + People Assessment + Opportunities | Status: Account type: First name: Last name: CTI User: Abbr: Nickname: Profile: Subordinates Search filter ABC ABC Audit SSC India SSC India BRS [seaco | nesia | nactive | Y.com | Personal Not | John Lee | | | | | | | | |

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



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

| Dashboard Clients Credentials Non | Clients Opportuni | ities Engager | ments Timeshe | eets Expens | es Employees n | nyPerformance | Billings | Receipts | Calendar | Reports | myPlanne |
|--|--------------------------|---------------|----------------------|-------------|-----------------------|-------------------------|----------|----------|----------|---------|----------|
| Xero menu events | | | | | | | | | | | |
| ▼ Users | Harry Yon | Ig | | | | | | | | | - |
| Activities Login Log Online | Login: | | YOURCOMPAN | r.com | Legal Entity: | DEF | | | ~ | | |
| ProfilesUsers | Status: Account type: | Active admin | v Inactive | | Department: Level: | Central Administrati | ve Staff | | ~ | | |
| + Organization | First name: | Harry | | | Coach: | John Lee | | | ~ | | |
| + Data Definition | Last name: | Yong | | | | ing: 💿 yes 🔵 | no | | | | |
| + Activities | E-mail: GTI User: | harry.yong@` | YOURCOMPAN | r.com 🕕 🕕 | Personal Notes | | | | | | |
| + Translations | Abbr: | Harry | | | | | | | 1. | | |
| + Other | Nickname: | Harry | | | | | | | | | |
| + Processes | Profile: | Finance - Har | ry | ~ | | | | | | | |
| + Business Engagement Process | Outradiantes | Timeste | O al a sulla a stata | Descent | | | | | | | |
| + People Assessment | 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: | 0 hrs/day |
| Saturday: | 0.00 hrs/day |
| Report Timesheets for | |
| | |