

# SOP: Adding Collaborators from the Admin Panel

## Objective

The objective of this SOP is to guide the admin on how to add collaborators from the admin panel efficiently.

## Key Steps

1. Navigate to the dashboard and select "Collaborators" from the top left menu.
2. Review the existing collaborators and click on the yellow + "Create New" button.
3. Fill in the required fields: First name, Last name, and email address.
4. Optionally, fill in any additional information for the collaborator.
5. Click on "Add Collaborator" to create the new collaborator.
6. Review the collaborator's page and provide more information if needed.

## Cautionary Notes

- Ensure that the email address provided for the collaborator is accurate and valid.
- Mandatory fields must be filled in either by the admin or the collaborator before proceeding.

## Tips for Efficiency

- Pre-fill as much information as possible to expedite the process.
- Communicate with the collaborator to ensure all necessary information is provided promptly.
- Regularly review and update collaborator information for accuracy and completeness.

## Link to Loom

<https://loom.com/share/7fb082e558cd4b7289b1e35fdcad41c8?src=composer>