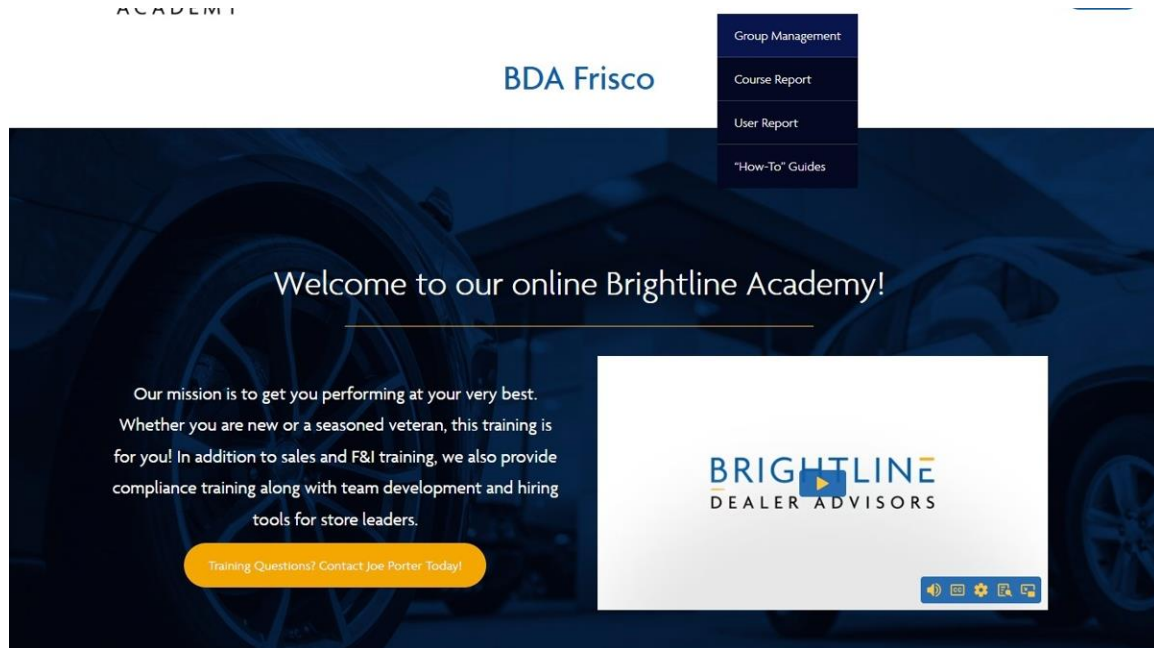


Add a Group Member or Leader

1. Login to the Academy webpage and select Group Management.



2. Select the location.

Group: BDA Test Group

Group Courses
5 Courses

Enrolled users
3 Users
297 Seats remaining

Users Reports

Search by name, email, status or key

	First name	Last name	Email	Status	Key
<input type="checkbox"/>	April Test	Learner	aprillearner@bda.com	Not Started	e619cb8120
<input type="checkbox"/>	John	Muskovac	jmuskovac@brightlinedealer.com	Not Started	d816f75de0
<input type="checkbox"/>	Kristin	Stentiford	kstentiford@brightlinedealer.com	Not Started	897b9f759

Show 50 entries First Previous 1 Next Last Showing page 1 of 1

3. To add a Team Member, lick "Users" under the "Enrolled Users" title.

Group: BDA Frisco

Group Courses
9 Courses

Enrolled users
32 Users
68 Seats remaining / 100 Total Seats

Users Reports

Search by name, email, status or key

	First name	Last name	Email	Status	Key
<input type="checkbox"/>	Aaron	Kelly	akelly@brightlinedealer.com	In Progress	920b6a75f8
<input type="checkbox"/>	Albert	Franco	afranco@brightlinedealer.com	In Progress	2a8834e424
<input type="checkbox"/>	Bryce	Lane	blane@brightlinedealer.com	In Progress	269d5bacfb
<input type="checkbox"/>	Chris	Plaza	cplaza@brightlinedealer.com	In Progress	2d1c21d4a5
<input type="checkbox"/>	Damian	Marchitello	dmarchitello@brightlinedealer.com	In Progress	ac0a07dbbd
<input type="checkbox"/>	Denny	Lecher	dlecher@brightlinedealer.com	In Progress	2bc7e941c0
<input type="checkbox"/>	Gabe	Aldrete	galdrate@brightlinedealer.com	In Progress	2c78a5494b

4. You can add one, multiple, upload, etc. Your choice!

Group: — BDA Frisco

Group Courses
9 Courses

Enrolled users
32 Users
68 Seats remaining / 100 Total Seats

Users ▾ Reports ▾

Add one (highlighted) key

Add multiple
Upload users
Download keys
Export CSV

	Last name	Email	Status	Key
<input type="checkbox"/>	Kelly	akelly@brightlinedealer.com	In Progress	920b6a75f8
<input type="checkbox"/>	Franco	afranco@brightlinedealer.com	In Progress	2a8834e424
<input type="checkbox"/>	Lane	blane@brightlinedealer.com	In Progress	269d5bacfb
<input type="checkbox"/>	Chris Plaza	cplaza@brightlinedealer.com	In Progress	2d1c21d4a5
<input type="checkbox"/>	Damian Marchitello	dmarchitello@brightlinedealer.com	In Progress	ac0a07dbbd
<input type="checkbox"/>	Denny Lecher	dlecher@brightlinedealer.com	In Progress	2bc7e941c0
<input type="checkbox"/>	Gabe Aldrete	galdrete@brightlinedealer.com	In Progress	2c78a5494b
<input type="checkbox"/>	Gene Silas	esilas@brightlinedealer.com	In Progress	622f806375

5. Fill in the information needed and click “add user.” An automatic email will be sent to the user.

Group: — BDA Frisco

Group Courses
9 Courses

Enrolled users
32 Users
68 Seats remaining / 100 Total Seats

Users ▾ Reports ▾

Search by name, email, status or key

☐ First name ☐ Last name

<input type="checkbox"/>	Aaron	Kelly	In Progress	920b6a75f8
<input type="checkbox"/>	Albert	Franco	In Progress	2a8834e424
<input type="checkbox"/>	Bryce	Lane	In Progress	269d5bacfb
<input type="checkbox"/>	Chris	Plaza	In Progress	2d1c21d4a5
<input type="checkbox"/>	Damian	Marchitello	In Progress	ac0a07dbbd
<input type="checkbox"/>	Denny	Lecher	In Progress	2bc7e941c0
<input type="checkbox"/>	Gabe	Aldrete	In Progress	2c78a5494b

☒ Add and invite user
☐ Send enrollment key

First name*

Last name*

Email*

Password

Set an optional password for new users. If no password is entered, a random password will be generated. If the user already exists, the user's password will not be changed and this value will be ignored.

Add user

6. Click "Close"

7. To add a Group Leader, follow the same steps under the “Group Leaders” section.

The screenshot shows the 'Group leaders' section with 2 leaders. A table lists existing leaders: Tim Zlomke, Tyler Lee, and Woody Wetherington. Below the table is an 'Add group leader' button, which is highlighted with an orange circle. A search bar is also present.

	First name	Last name	Email	Status	Key
<input type="checkbox"/>	Tim	Zlomke	tzlomke@brightlinedealer.com	Not Started	3d1ca841f
<input type="checkbox"/>	Tyler	Lee	tlee@brightlinedealer.com	In Progress	a0f4504fd0
<input type="checkbox"/>	Woody	Wetherington	wwetherington@brightlinedealer.com	Not Started	8c580fa43d

Group leaders
2 leaders

Add group leader

Search by name, email, status or key

	First name	Last name	Email
<input type="checkbox"/>	Admin Name	Text	admin@www.brightlinedealeradvisors.com
<input type="checkbox"/>	Kristin	Stentiford	kstentiford@brightlinedealer.com

8. Fill in information needed and click “add group leader.” An automatic email will be sent to the user.

The screenshot shows the 'Group leaders' section with a modal form for adding a new group leader. The modal form has fields for 'First name*', 'Last name*', and 'Email*'. Below the fields is a note: 'If the email address matches an existing user in the system, first and last name will not be changed but the existing user will be added as a Group Leader.' and an 'Add group leader' button. The background shows the same table of existing leaders as the previous screenshot.

Group leaders
2 leaders

Add group leader

Search by name, email, status or key

	First name	Last name	Email
<input type="checkbox"/>	Admin Name	Text	admin@www.brightlinedealeradvisors.com
<input type="checkbox"/>	Kristin	Stentiford	kstentiford@brightlinedealer.com

First name*

Last name*

Email*

If the email address matches an existing user in the system, first and last name will not be changed but the existing user will be added as a Group Leader.

Add group leader