

CENTERPOINT AUTOTECH

QUICK START GUIDE 06

TEAM MANAGEMENT & TECHNICIAN SEATS

Admin control of team access, technician invitations, permissions, password resets, active status, and seat usage.

REVIEW PDF

WEBSITE ORDER #6

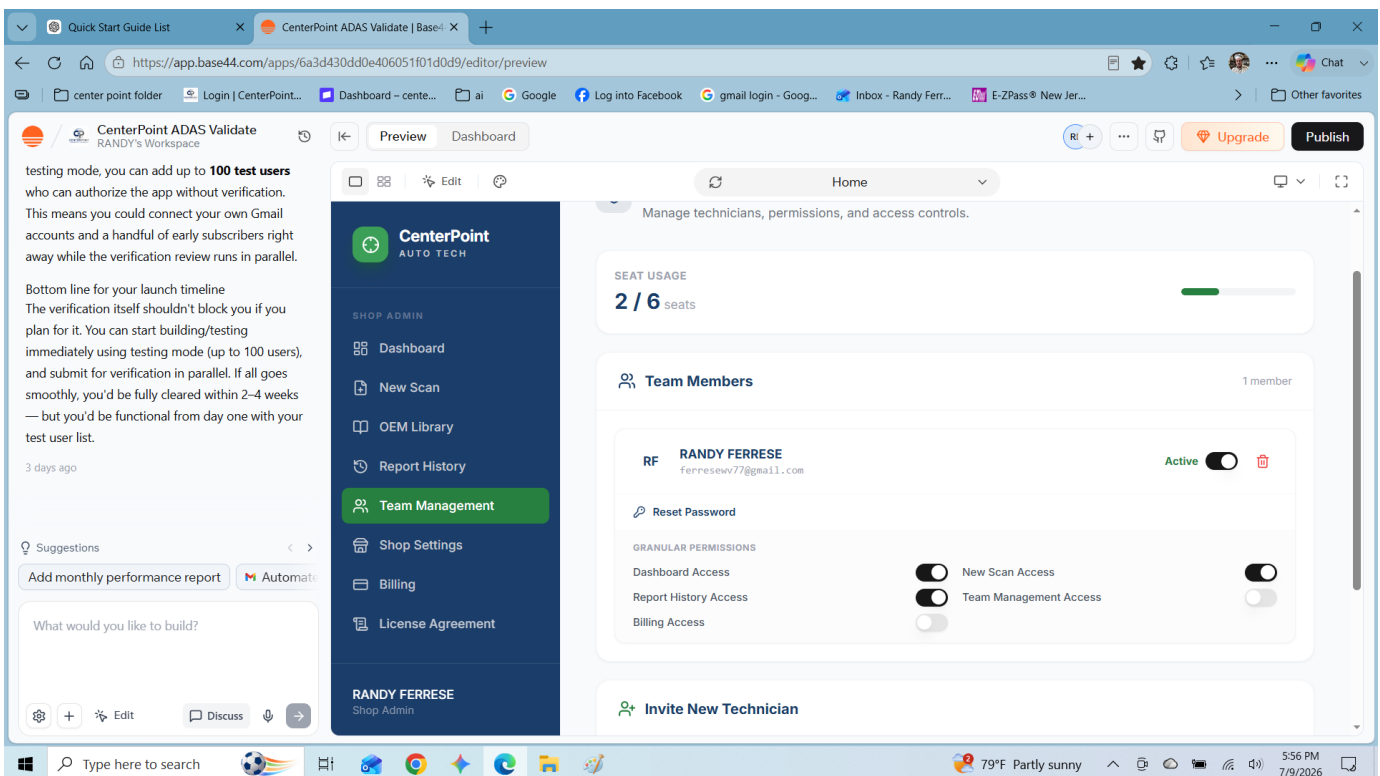
Guide Objective

Use Team Management to review seat usage, manage team members, control user access, reset passwords, and invite technicians into the CenterPoint organization. This guide covers the **Admin side** of the workflow.

The technician's invitation acceptance and account activation process is covered separately in Guide 07.

1. Open Team Management

From the CenterPoint left-side navigation menu, select **Team Management**. This area is intended for Shop Admin oversight of technicians, permissions, access controls, and technician invitations.



SCREEN 1 — Team Management view showing seat usage, team member record, Active status, Reset Password, granular permissions, and the start of the Invite New Technician section.

2. Review Seat Usage

Review the **Seat Usage** indicator before adding another technician. In the current interface, the example shows **2 / 6 seats**. The controlling CenterPoint structure is one Admin account with the ability to invite up to five technician users.

Seat availability and billing status should be reviewed before making access changes or sending a new invitation.

3. Review the Team Member Record

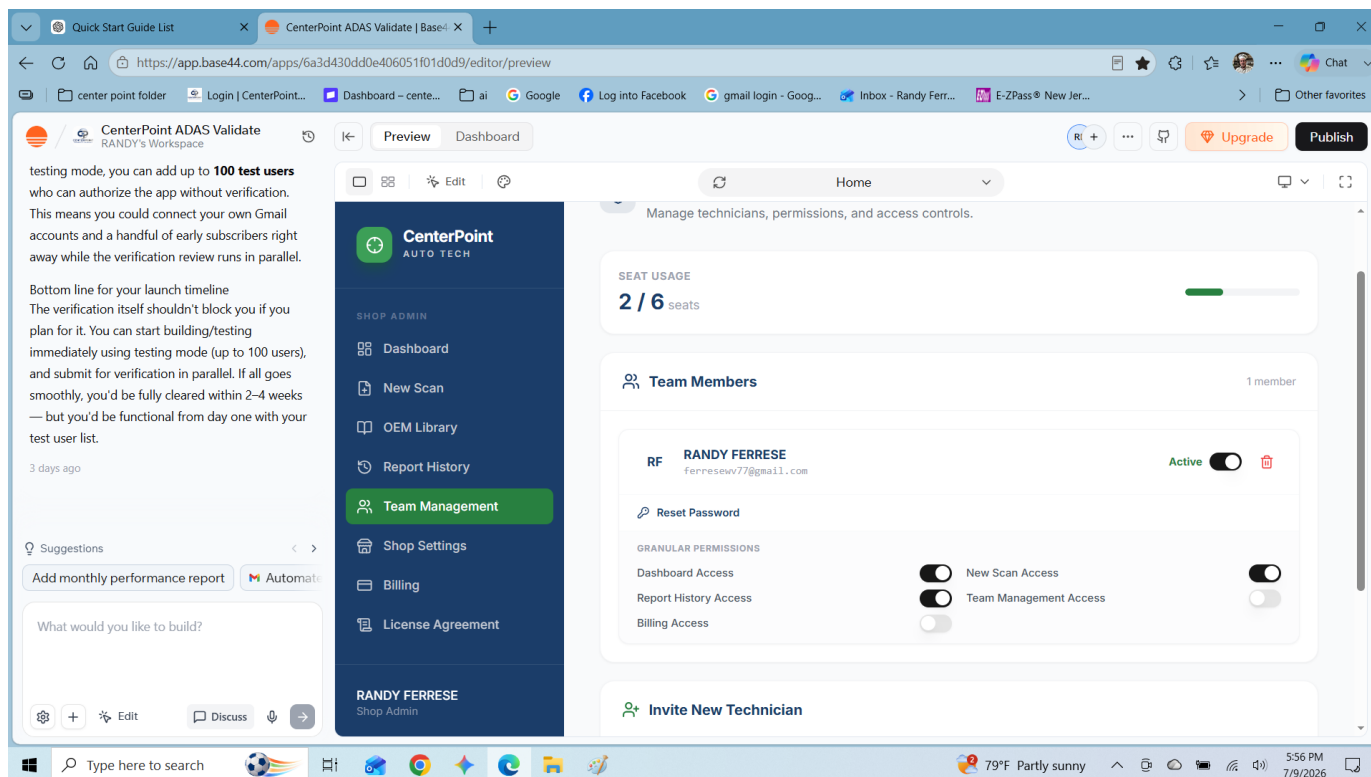
Each visible team member record should be reviewed before changing access. Confirm the intended user name and email address, then review the current Active status and available controls.

Recommended practice: verify the user identity before resetting credentials, changing permissions, deactivating access, or removing a user.

4. Reset a Password

Use **Reset Password** for the intended team member when a password reset is appropriate. Confirm that you are acting on the correct user record before initiating the reset workflow.

Password reset access is an administrative control and should be used only for the intended authorized user.



SCREEN 2 — Team member controls include Reset Password directly below the selected user record.

5. Manage Active Status

Use the visible **Active** status control to manage whether the team member remains active in the organization. Review the intended user carefully before changing status.

Changing user access can affect the person's ability to use CenterPoint. Administrative access decisions should be deliberate and documented according to the Subscriber's internal practices.

6. Assign Granular Permissions

The current Team Management interface provides individual permission controls. The Admin can make access decisions user by user rather than automatically giving every team member the same authority.

Dashboard Access — Controls access to the Dashboard.

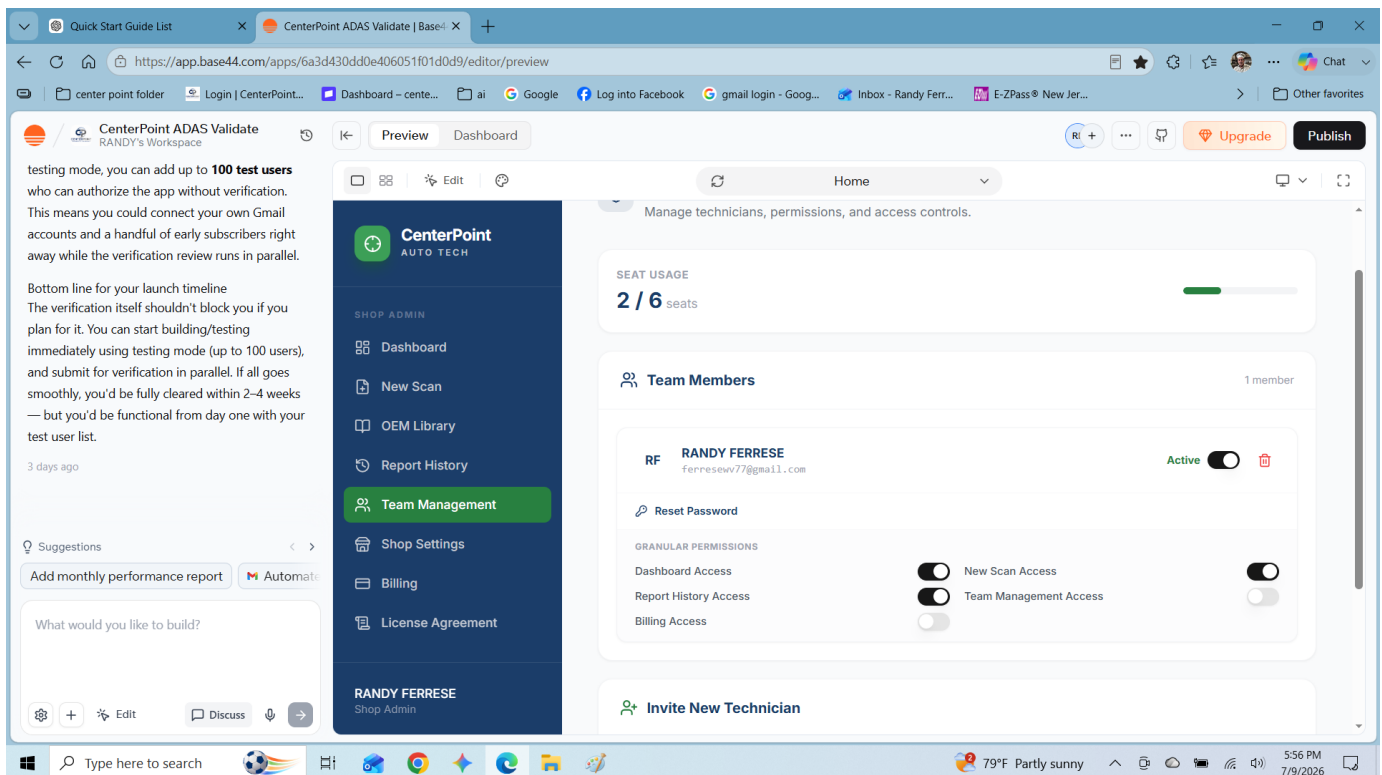
New Scan Access — Controls access to the New Scan workflow.

Report History Access — Controls access to historical workflow records.

Team Management Access — Controls access to team-management functions.

Billing Access — Controls access to billing-related functions.

Grant only the access appropriate to the user's responsibilities. Review permission settings after any role or responsibility change.

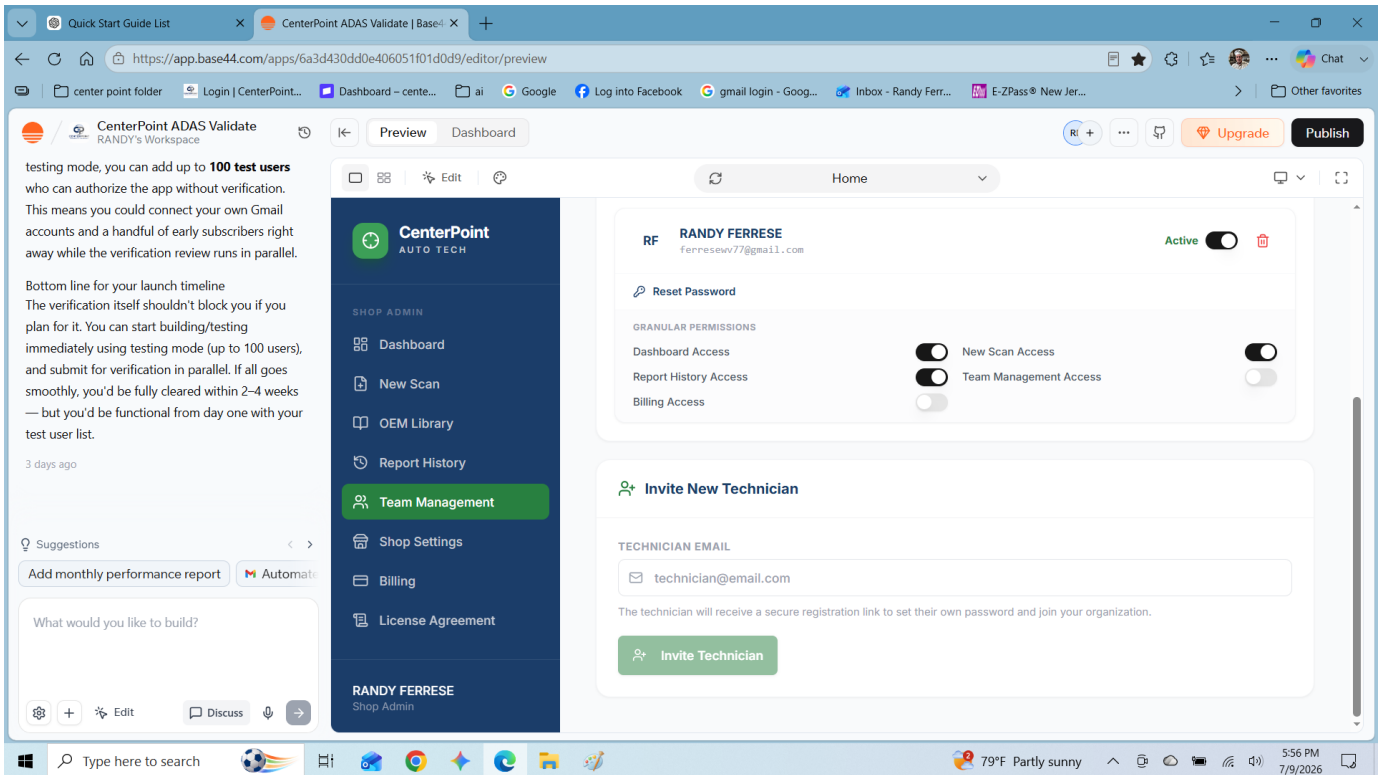


SCREEN 3 — Granular permission switches shown for Dashboard, New Scan, Report History, Team Management, and Billing access.

7. Invite a New Technician

Scroll to **Invite New Technician**. Enter the technician's email address, review it for accuracy, and select **Invite Technician** when ready.

The current interface states that the technician will receive a secure registration link to set their own password and join the organization.



SCREEN 4 — Invite New Technician section with technician email field and Invite Technician button.

8. Understand the Invitation Handoff

Guide 06 ends with the Admin sending the invitation. The technician's next steps — receiving the invitation, accepting it, setting credentials, and activating access — belong to **Guide 07 — Technician Invitation Acceptance & Account Activation**.

9. Technician Seat Billing Awareness

Under the current controlling CenterPoint workflow, a Technician Seat becomes billable when the invited technician accepts the invitation. The current locked seat price is **\$12.99 per Technician Seat**. Technician Seat charges are paid through the Subscriber/Admin account and renew on the Admin's monthly anniversary.

This Quick Start Guide summarizes the operational workflow. Billing, cancellation, renewal, access-removal, and related terms remain governed by the applicable CenterPoint subscription and legal documents.

10. Remove a Team Member

The team member record includes a red delete/remove control. Before using it, confirm the intended user and consider the access and seat consequences. Do not remove a user merely to test the control.

Removal, deactivation, invitation status, and billing treatment should be interpreted under the controlling CenterPoint workflow and subscription rules.

Quick Reference Workflow

Step	Admin Action	Check
1	Open Team Management	Confirm Admin/account context
2	Review seat usage	Confirm capacity before invitation
3	Select team member	Verify name and email
4	Reset password if needed	Confirm correct authorized user
5	Manage Active status	Understand access effect
6	Set granular permissions	Grant role-appropriate access
7	Enter technician email	Check address carefully
8	Invite Technician	Technician receives secure registration link
9	Handoff to Guide 07	Technician accepts and activates account

Guide Completion Check

- I can open Team Management from the left-side navigation.
- I can review current seat usage before inviting another technician.
- I can identify the correct team member before changing access.
- I understand the Reset Password control.
- I can manage Active status deliberately.
- I can assign granular permissions by user responsibility.
- I can enter and verify a technician email before sending an invitation.
- I understand that Guide 07 covers technician acceptance and account activation.
- I understand that accepted Technician Seats follow the controlling billing rules.

NEXT GUIDE: Guide 07 — Technician Invitation Acceptance & Account Activation