

Invite a collaborator and approve access requests

Invite someone to the staff by email or with a link, with the role already chosen, and decide on requests from people offering to help.

5 min · Available; invites respect the plan's collaborator limit · 2026-09-26

Before you begin

- ✓ You need the Manage collaborators permission.
- ✓ If the person already has an account and follows the community, assigning the role from People is quicker.

1 STEP 1 OF 4 · 30 S

Open Invites & requests

In **People** select **Invites & requests**. The page brings together incoming requests and outgoing invites, with the **Pending requests**, **Pending invites**, **Accepted (30d)** and **Expired invites** counters.

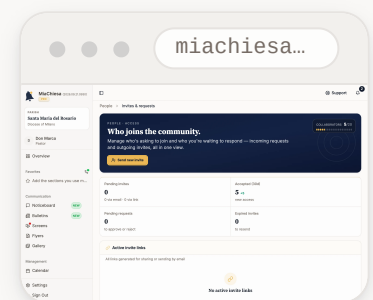


Fig. 1 Every new invite starts from Send new invite.

2 STEP 2 OF 4 · 1 MIN

Choose the role and send by email

Select **Send new invite: Invite Team Member** opens. In **Role to assign** pick a preset or custom role; **View all role permissions** shows what it will grant.

In the **Via Email** tab type the address in **Email Address** and press **Send Invite via Email**. The person receives a link valid for 7 days that works only once: opening it they create an account, or sign in, and are added with the chosen role.

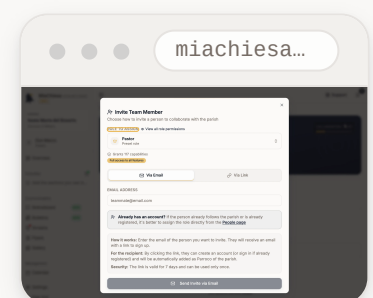


Fig. 2 Choose the role before sending the invite.

3

STEP 3 OF 4 · 1 MIN

Or generate a link

In the **Via Link** tab decide whether to turn on **Single-use link**, then press **Generate Invite Link**. **Generated invite link**: appears with **Copy Link** and **WhatsApp**; the link lasts 30 days.

Links stay listed in **Active invite links**, where you can copy them again, show their QR code or turn them off with **Deactivate**.

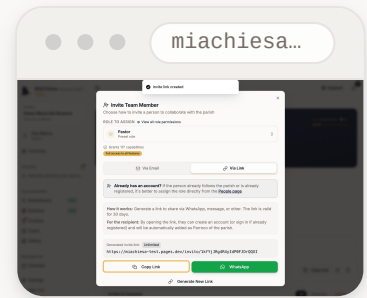


Fig. 3 Share the link only with people who should join the staff.

4

STEP 4 OF 4 · 1 MIN

Decide on requests

People offering to help appear in the list with the **Request** badge. Select **Review**: the **Review request** dialog shows **Requested role** and **Request date**. Choose **Approve** or **Reject**; with several pending requests you can use **Approve all**.

Invites not yet accepted stay in the list with the **Invite** badge, **Resend** and **Cancel invite**.

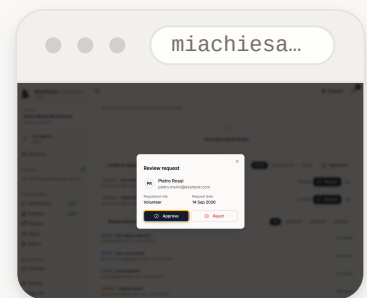


Fig. 4 Approve only people you recognise.

What you have achieved

✓ The invited person receives the email or link and joins the staff with the chosen role once they accept.

✓ Approved or rejected requests leave the pending list.

Troubleshooting

I see "Enter a valid email address"



Fix the address in the Email Address field and try again.

I see "Unable to send the invite"



Sending failed: try again. If it keeps happening, generate a link from Via Link and share it.

The person already has an account



If they already follow the community or are registered, assign the role directly from People instead of inviting them.

An invite shows as Expired



Use Resend on the row; when several email invites have expired, Resend all expired also appears.