How to Invite Your Team and Manage Roles

What This Does

Invite your staff to help run your business on Pixalink. Each teammate gets their own login, and you choose which outlets they can manage so head-office staff see everything while branch staff only see their own outlet.

Real-Life Example

Aishah runs Aroma Cafe with three outlets across Klang Valley. She just hired Wei Lin as the Bangsar branch manager and Siti as the KLCC branch manager. She also needs Ahmad, her head-office assistant, to handle marketing across all three outlets.

Aishah opens Pixalink and invites all three by email. She ticks "Aroma Cafe — Bangsar" only for Wei Lin so he can run the loyalty programme and reservations for his branch without seeing other outlets. She does the same for Siti with the KLCC outlet. For Ahmad, she leaves the outlet field blank so he can manage rewards, broadcasts, and reports across every Aroma Cafe location. Within minutes, all three receive their invite emails and are working in Pixalink before lunch.

How to Invite a Teammate

1. Go to **Admin Panel → Settings → Users**.

Loyalty Program

Forms

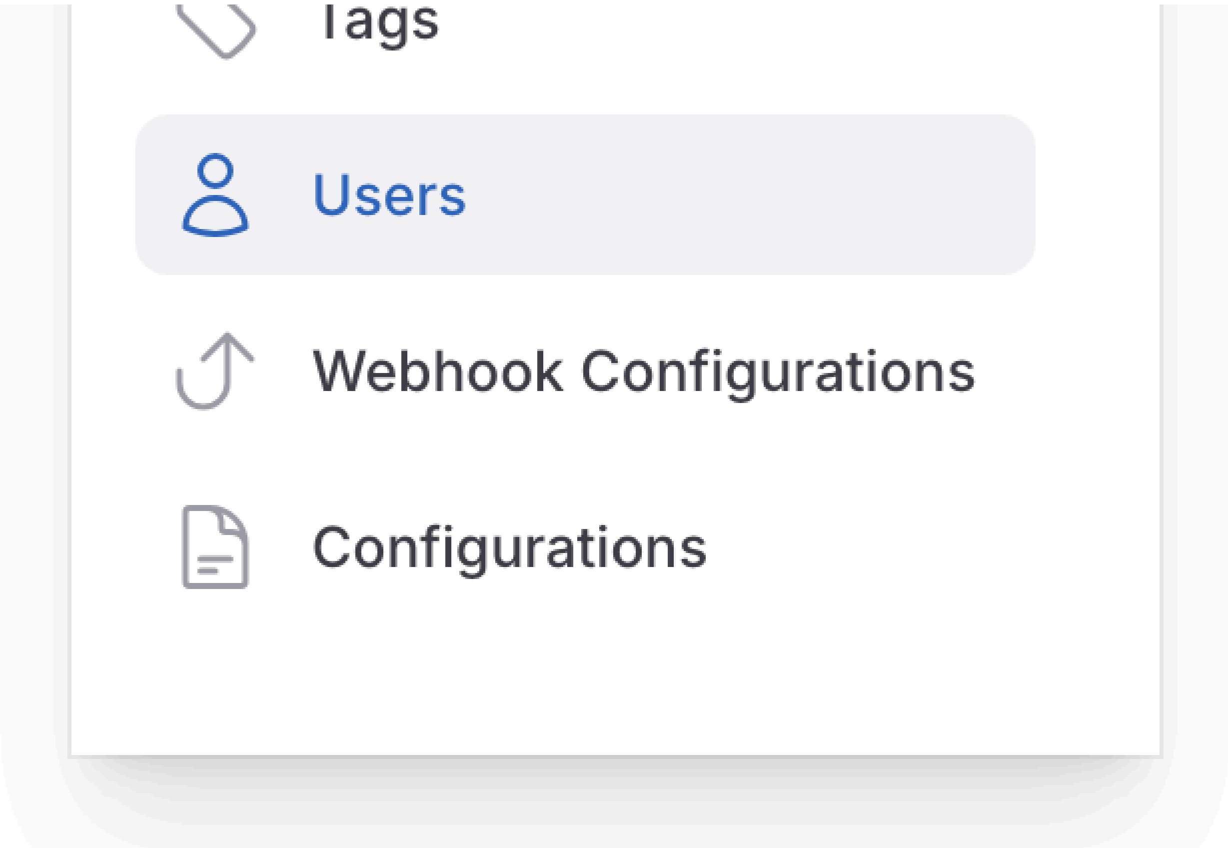
Wallet Management

Reservation

CRM

General

Settings

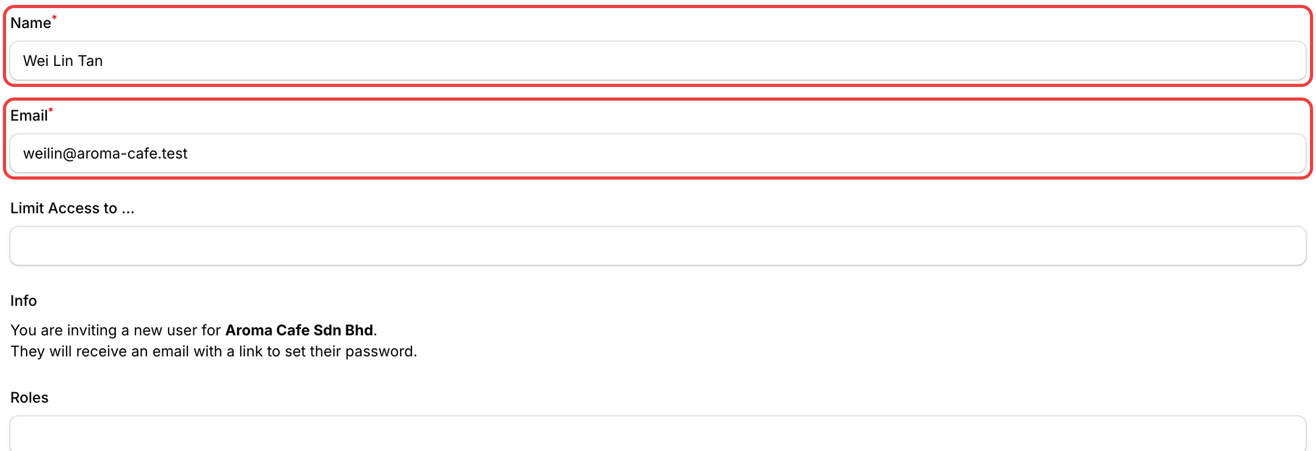


2. Click **+ New User** at the top right of the Users list.

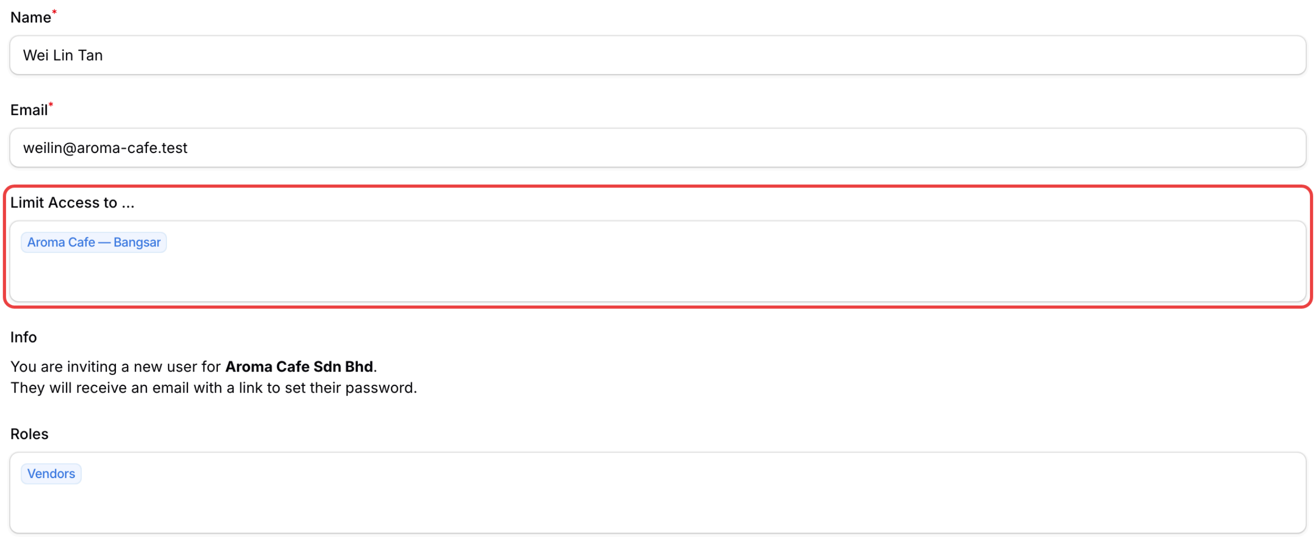
Users

Name	Email	Roles	
Aishah binti Rahman	aishah@aroma-cafe.test	Admin	View Edit Delete
Wei Lin Tan	weilin@aroma-cafe.test	Vendors	View Edit Delete
Siti Nurhaliza	siti@aroma-cafe.test	Vendors	View Edit Delete
Ahmad Faizal	ahmad@aroma-cafe.test	Vendors	View Edit Delete

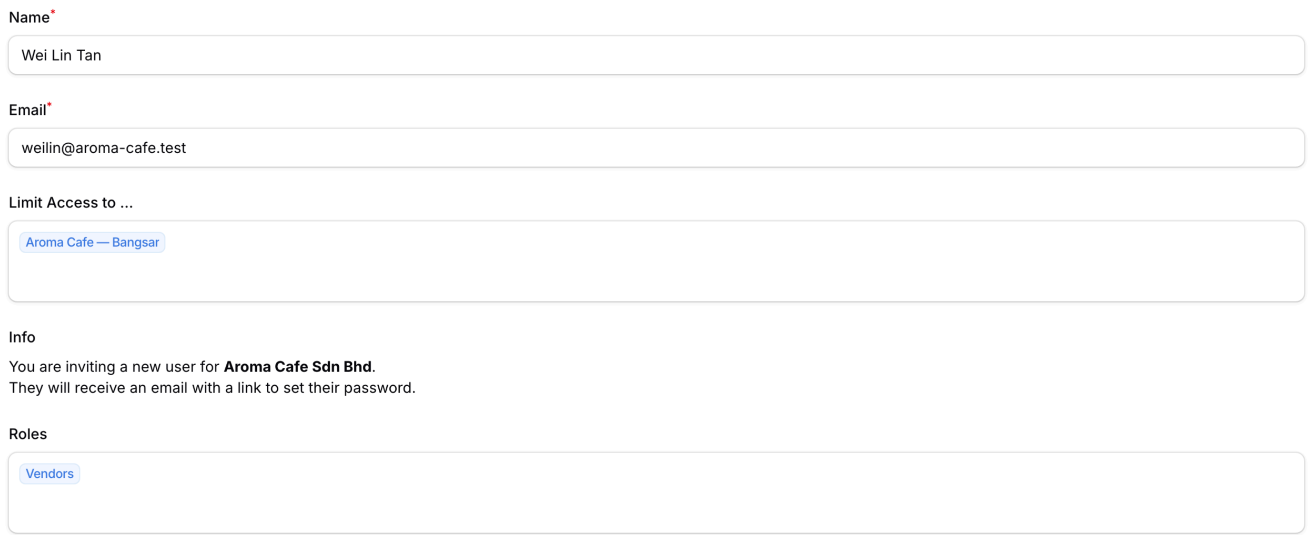
3. Fill in your teammate's **Name** and **Email**. Use the email they actually check — that's where the invite link is sent.



4. Pick the outlets they can manage in **Limit Access to ...**. Leave it empty if they should see every outlet, or pick one or more outlets to restrict their access.



5. Leave the **Roles** field as **Vendors** — this is the only option available. Click **Create** to send the invite.



Your teammate gets an email with an **Accept Invite** button. They click it, set their own password, and they're in. The invite link is good for one week.

Roles Explained

Pixalink uses one role for vendor team members:

- **Vendors** — full access to run the business. They can manage customers, rewards, points, reservations, campaigns, broadcasts, forms, tiers, credits, the customer portal, and reports. They cannot delete the organisation itself or change billing.

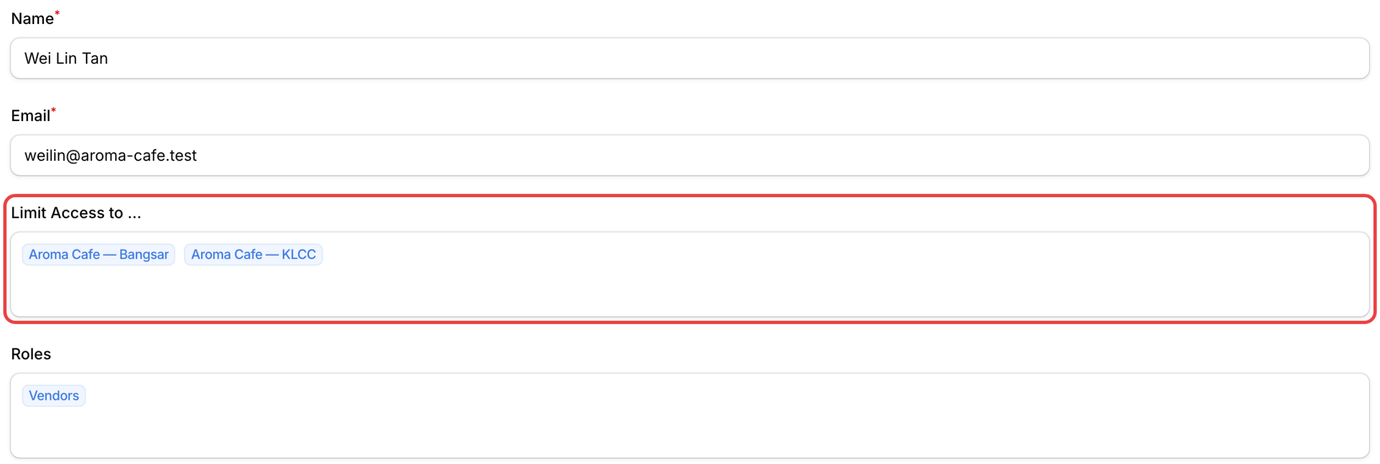
The role is set automatically when you invite someone, so you don't need to choose between role types. To control what each teammate sees and touches, use **outlet access** (described below) rather than separate roles.

Restricting Access to Specific Outlets

If you have more than one outlet, **Limit Access to ...** is your main control:

- **Leave it empty** — the teammate sees every outlet. Use this for owners, head-office staff, or marketing leads.
- **Pick one outlet** — the teammate only sees that branch's customers, reservations, and reports. Use this for branch managers or store staff.
- **Pick multiple outlets** — the teammate sees only the outlets you tick. Use this for area managers covering a few branches.

You can change a teammate's outlet access any time by going to **Users**, clicking **Edit** on their row, and updating the **Limit Access to ...** field.



What Your Customers Will See

Your customers are not affected by this — these settings only change what your team sees and can do.

Removing or Updating a Teammate

From the **Users** list, every row has three actions:

- **View** — see the teammate's profile and the outlets they can access.
- **Edit** — change their name, email, or outlet access.
- **Delete** — remove them. They lose access immediately and can no longer log in.

When someone leaves your team, delete their account on the same day to keep your data safe.

Good to Know

- Teammates set their own password during the invite, so you never need to share or reset one for them.

- The invite email link expires after 7 days. If a teammate misses it, delete their account and invite them again.
- You cannot change your own role — only another team member can do that for you.
- Outlet access only filters what a teammate sees. If you want to fully block someone from the system, delete their account instead.
- Anyone you invite can also invite more teammates, so be selective.
- Deleting a teammate is permanent — it cannot be undone, and their past activity log entries will no longer show their name.

Need Help?

Reach out to our support team — we're happy to walk you through your first invite or help you tidy up team access.

What's Next?

- How to Add a New Team Member — the short version of this guide
- Understanding Spaces — What They Are and When to Use Them — set up outlets before you invite branch staff