

Consultant Management Feature

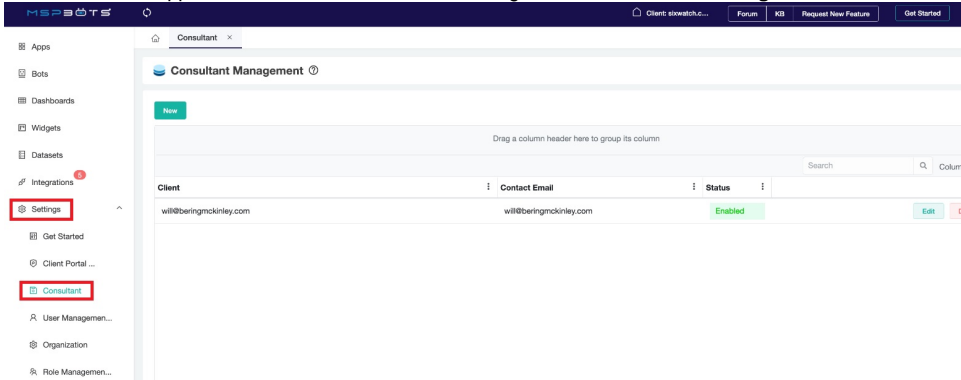
The Consultant feature gives external consultants MSPbots access to help you manage your MSPbots account.

What's in this article:

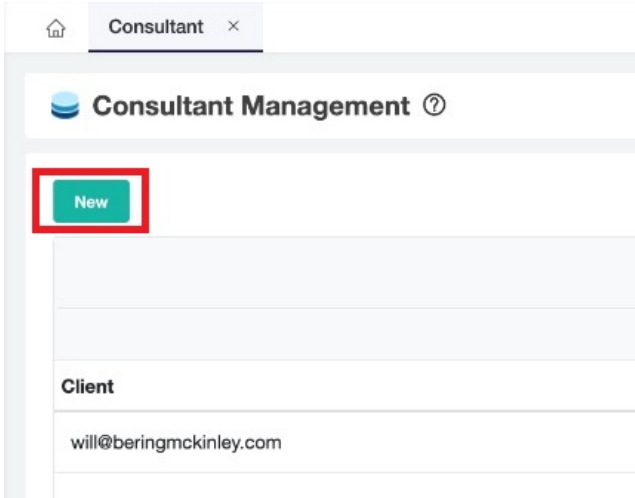
1. Adding a Consultant
2. Selecting a Role for your consultant
3. Switching to consultant access

1. Adding a Consultant

1. On the MSPbots app menu, access the Consultant Management function from **Settings > Consultant**.



2. Click on the **New** button.



3. Input the Client Information.

New Consultant

×

Client Information

Select Role

* Email Address

User Name

Role Config

Role Config

* First Name

First Name

* Last Name

Last Name

* Display Name

Display Name

Direct Phone

Mobile

Company Name

Company Name

Status

☐ Disable

☒ Enabled

Cancel

Confirm

4. Next, assign a role to your consultant (below) and click **Confirm**.

2. Selecting a Role for your consultant

Assigning roles define your consultant's level of access to the MSPbots app, its apps, and assets.

1. On the New Consultant window, click on **Role Config** field and select the role you want to assign from the dropdown list. Refer to the article [MSPbots User Roles and Descriptions](#) for more information on each role.
2. Click **Confirm** to save and add the new consultant and the assigned role.

New Consultant



Client Information

* Email Address

User Name



* First Name

First Name

* Last Name

Last Name

* Display Name

Display Name

Direct Phone

Mobile

Company Name

Company Name

Status

☐ Disable

☒ Enabled

Select Role

Role Config

Role Config



Admin

User

Financial

Dashboard Only

Attendance Only

Peer group

Cancel

Confirm

3. Switching to consultant access

Click your avatar on the upper-right corner of the MSPbots app's screen and click **Switch to mspbots.ai**.

