Resending A Dashboard Invitation Step-by-Step

Why would I need this? In the case where a lead/client requested a dashboard but did not act on the initial invitation email. This lets you resent that invitation email to get their account up and running.

Step 1: Go to the "Contacts" tab

Step 2: Find the contact's name in the contact list(s)

Step 3: Under "Resend Invite," click the letter icon, and the system will automatically send an invitation to your contact to complete their account creation.