

How to Update Your Company's Staff

*Note: You must have "Management Access" in order to update Staff, see all invoices, and be able to update the Company Profile. If you do not see the "Staff" tab while logged in, and believe you should have Management Access, please contact us at taa@triangleaptassn.org.



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The screenshot shows the Member Compass interface. At the top, there are navigation tabs: DASHBOARD, STAFF (highlighted with a red circle 1), ACCOUNTING, EVENTS, and ORDERS. To the right of these tabs are links for Company and Profile. Below the tabs is a search bar labeled "Find a person by name" and a "+ ADD STAFF" button (highlighted with a red circle 2). The main content area is a table with columns: NAME, TITLE, PHONE, EMAIL, and ACTION. The table lists several staff members, including Aby Henneberry, Candace Patrick, Dan Patrick, Example TAA Staff, Jacob R. [redacted], Josie Eatmon, Madeline Gale, and Meg Palumbo. The ACTION column for each row contains three options: "Edit Profile", "Give management access", and "Remove from staff". A red circle 3 highlights the ACTION column.

NAME ^	TITLE	PHONE	EMAIL	ACTION
Aby Henneberry	Education Coordinator	(919)782-1165x214	ahenneberry@triangleaptassn.org	Edit Profile Give management access Remove from staff
Candace Patrick	Membership & Marketing Manager	(919)782-1165x3	cpatrick@triangleaptassn.org	Edit Profile Give management access Remove from staff
Dan Patrick				Edit Profile Give management access Remove from staff
Example TAA Staff	Communications Manager	(919)782-1165	communications@triangleaptassn.org	Edit Profile Give management access Remove from staff
Jacob R. [redacted]	Government Affairs Director	(919)782-1165x6	jrobertson@triangleaptassn.org	Edit Profile Give management access Remove from staff
Josie Eatmon		9197821165	jeatmon@triangleaptassn.org	Edit Profile
Madeline Gale	Government Affairs Intern	(919)782-1165	maleptassn.org	Edit Profile Give management access Remove from staff
Meg Palumbo	Communications Manager	(919)782-1165x1	mpalumbo@triangleaptassn.org	Edit Profile Remove management access Remove from staff

1 Click the "Staff" tab in your Member Compass

2 Don't see a staff member listed? Click "Add Staff" to add their them.

3 Use these three options to edit existing staff.

1) "Edit Profile" will allow you to edit their info such as email, title, etc.

2) "Give Management Access" gives higher access to existing staff. It will allow them to see all invoices for the company, edit company information, and add/remove/edit staff members. Please give this access carefully.

3) "Remove from staff" will allow you to unlink a staff member from your company when they no longer work for you.

If a staff member no longer works at your property, but is still with your company, please contact us so we can link them to the correct "Parent Company"

Questions? Contact Meg Palumbo at mpalumbo@triangleaptassn.org