# Work as a team

One account for the practice, a seat for each person, and every site private to the person who made it until they share it. One person edits a site at a time; a site can be passed to a colleague with a note, handed over for review and signed off under a named seat.

## 1. Set the practice up Settings, then Organisation & Team

1. Team is £300 a month plus VAT, or £3,300 a year, for one admin seat and five consultants with AI included on every seat. Further consultants are £25 a month each. It is arranged by email: write to **hello@townplannerpro.co.uk** with the practice name and the names and email addresses of the team, and it is running the same day.
2. In **Settings**, under **Organisation & Team**, tap **Add Member**. Enter the **Name** and **Email** and choose a role: **Professional** (appraisals, review and sign-off), **Admin** (prepares sites; cannot sign off) or **Director** (everything, plus the team).
3. Nothing is emailed from here. Tell the colleague to sign in, or start a trial, with that same email address; the practice appears for them at their next sign-in. Until then they show as **not signed in yet** and cannot be picked for a share or a pass.
4. Change a role from the dropdown on a member's row, or remove them with the bin. Sites shared with them, and any passed to them, go back to their creators.

> Members use the practice's plan: a lapsed trial of their own no longer matters, the five-site trial cap does not apply, and every seat has AI without a key to set up. The company logo on reports is the practice's.

## 2. Who sees a site the chip at the top of a site: Private to you

1. A new site is **Private to you**. Nobody else in the practice sees it, directors included.
2. Tap the chip to change it: **Whole practice**, or keep it private and **Share with named colleagues**. Everything under the site follows it: photographs, checks, documents, history.
3. A colleague sees **Shared with you by** your name on a site you shared. Passing a site to someone shares it with them automatically.
4. Casework is not shared. Applications, pre-apps, appeals and conditions belong to the person who created them.

## 3. One editor at a time "I go, you go"

1. Opening a site takes it for you. A colleague who opens it meanwhile sees a banner, **Kelly is working on this site, since 14:05**, and can read everything; their changes wait until you finish. Leaving the page releases it, and it lapses after 30 minutes without activity.
2. A director can **Take over** a professional's or an admin's site. The confirm says their unsaved changes will be refused, which is what happens.
3. Directors are peers: a director cannot take over, share or pass another director's site. It is that director's alone, as a private site is.

## 4. Pass, hand over, sign off the bar at the top of the site

1. **Pass to...** sends the site to a colleague. Choose them, set the status if you want (**Preparing** or **Awaiting review**, or leave it as is) and write a note: what is done, what to add next. Your hold is released so they can start at once. They see **Passed to you** in their sites list and your note on the site; you see **Passed to Kelly** with a **Take it back** button.
2. **Hand over for review** marks a site **Awaiting review** and records you as the person who prepared it. An admin prepares and hands over; a professional or director reviews.
3. **Mark as reviewed** records the reviewer. **Reopen** puts it back to Preparing.
4. A reviewed site's report carries **Prepared by** and **Reviewed by** on the cover, under the practice name. The names come from the seats and cannot be typed in: authorship is the accountability.

### Admin

Prepares sites: the boundary, the checks, the documents, the history. Hands over for review; cannot mark a site as reviewed. Manages members and billing.

### Professional

Site appraisals, maps, photographs, constraints and AI tools. Reviews and signs off under their own name. Sees their own sites and those shared with them.

### Director

Everything a professional does, plus the team: can take over a professional's or admin's site and change who sees it. Sees a colleague's site only when it is shared.

### From the field

Capture a site on the phone, **Pass to...** the office with "photos done, please add the history", and it is theirs while you travel. See the iPhone guide.