

Staff Portal Setup Step 3 - Send Portal Login Email

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The third step of the Staff Portal Guided Setup will send selected staff an email containing staff portal login information. The email will be sent to the email address on the *Summary* tab of their *Staff* record.

Different emails are sent based on whether the staff person was assigned a **Portal Login ID (Staff Portal Setup Step 2)** or if their **User ID was matched (Staff Portal Setup Step 1)** to their staff record.

- Select the Staff you want to send the email to.
- Click **SEND PORTAL LOGIN EMAIL**
- You can opt to leave the setup and continue at a later time or click **GO TO STEP 4: STAFF SETTINGS** → to advance to the next step. See **Staff Portal Setup Step 4 - Customize Staff Settings**.

The screenshot shows a web interface for sending portal login emails. At the top, there are two buttons: 'SEND PORTAL LOGIN EMAIL' (highlighted with a yellow star and a hand cursor) and 'GO TO STEP 4: STAFF SETTINGS →'. Below the buttons, the heading reads 'Send Staff an email with their staff portal login information.' Two paragraphs of text explain the email content: one for staff with user IDs and one for auto-assigned portal login IDs. A section titled 'Select the Staff to Email' contains two buttons, 'Check All' and 'Uncheck All', and a list of staff members: Stephanie Andrews, Dianne Harris (checked with a hand cursor), and John Linton.

When the Portal Login ID is auto-assigned, an email is sent containing the Staff Portal Login ID and a link for the staff person to create their password:

The screenshot shows an email titled 'Staff Portal Login Information' from 'Jackrabbit Help Center - Staff Portal - Login Information'. A callout bubble points to the sender name, stating 'Your organization's name'. The email content includes the heading 'Staff Portal Login Information' and the instruction 'Login to Jackrabbit Help Center Staff Portal with the following:'. It displays the 'Staff Portal Login ID: DHarris' and a note 'This link will expire in 24 hours.' Below this, there are two blue links: 'Click here to create your password.' and 'Click here to access the Staff Portal.'. A second callout bubble points to the first link, stating 'TIME SENSITIVE link to create password'.





The link to create the password is time sensitive and expires in 24 hours.

When the staff person is matched to their Jackrabbit User ID, the email gives them their login (which is their User ID) and lets them know their password is the same as their Jackrabbit User ID password:

Jackrabbit Help Center - Staff Portal - Login Information ▶ Inbox x

Staff Portal Login Information

Login to Jackrabbit Help Center Staff Portal with the following:

Login: **diharris**

Password: **Same as your Jackrabbit password**

[Click here to access the Staff Portal.](#)

Quick link to the Staff Portal

This is the staff person's Jackrabbit User ID