

# TeamManager Signup Guide for Companies

Welcome to TeamManager, a powerful platform for managing staff profiles, documents, tasks, and folders in a secure, multi-tenant environment. This guide explains how your company can sign up for a dedicated account, create a personalized subdomain, access your unique app space, and enable staff to create user accounts. Follow these steps to get started.

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## Signing Up for your Company

To use TeamManager, your company must create a dedicated account, which provides a private workspace for your data, accessible via a unique subdomain.

### Steps to Sign Up:

1. **Visit the Main Site:**
  - a. Navigate to <https://teammanager.ng/tenants/> using a modern browser (Edge, Chrome, Safari, or Firefox).
2. **Locate the Company Signup Option:**
  - a. On the homepage, find the **Apply for your Company** or **Get Started With Your Company** button (typically in the hero section or navigation bar).
  - b. Click to open the Company signup form.
3. **Complete the Signup Form:**
  - a. Provide the following details, note all fields are important:
    - **Organization Name:** Your organization's legal or trading name (e.g., Xtra Youth Zealous Partners LTD).
    - **Email:** A primary contact email for account administration.
    - **Admin Username:** A username for your company's's superuser account.
    - **Password:** A secure password for the admin account.
    - **Slug:**
      1. **Choose a Subdomain:**
        - a. Here, you'll be prompted to enter a preferred subdomain (e.g., 'xyz' for the company Xtra Youth Zealous Partners LTD).
        - b. The subdomain must:
          - Be unique (not already in use by another company).
          - Contain only lowercase letters, numbers, and hyphens (no spaces or special characters).
          - Be concise and reflective of your company name.
      2. **Validate the Subdomain:**

- a. The system will check availability in real-time. If your chosen subdomain is taken, you'll be prompted to select another.

### 3. Confirm Subdomain:

- a. Once validated, your subdomain is linked to your company account.
- b. Your app space will be accessible at <https://<your-subdomain>.teammanager.ng> (e.g., <https://xyz.teammanager.ng>).

### 4. Submit the Form:

- a. Click **Submit** to create your Company's account. The system will generate a record in the backend, linked to your company's details.

**Note:** All details filled in are crucial and must be correct, as they would be needed for authentication.

**Tip:** Record your subdomain, as it's the primary way to access your TeamManager instance.

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## Accessing Your Personalized Login Redirect

After company account creation, you'll receive a login redirect link to access your company's personalized app space.

### Steps to Access:

#### 1. Click the Login Redirect Link:

- a. Clicking the link will take you to your company's login page (e.g., <https://xyz.teammanager.ng/accounts/login>).
- b. The redirect ensures you're routed to your subdomain's secure login interface.

#### 2. Log In:

- Enter your admin username and password.
- If prompted, reset your password for security.
- You'll land on your company's dashboard, styled Bootstrap for a user-friendly experience.

**Security Note:** Bookmark your company's login page (e.g., <https://xyz.teammanager.ng/login>) for future access. Avoid sharing your admin credentials.

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## Enabling Staff to Create User Accounts

Once your company is set up, your company's staff can create user accounts to access TeamManager's features, such as profile management, document uploads, tasks collaboration, calendar, contacts, etc.,

## Steps for Staff Account Creation:

### 1. Admin Setup:

- Log in as your company admin (using the steps above).
- Navigate to the **Admin Dashboard**. Here you can organize your company details.
- Define departments and teams to organize staff (e.g., HR, IT, Sales).

### 2. Invite Staff:

- Option 1: **Manual Creation**:
  - **Admin Dashboard > Users (View Users) > Add User**. Admin creates accounts by entering staff details (username, email, password; password can be reset by staff later on).
  - Select a role (e.g., HOD) to set permissions.
  - Save to generate a welcome email with a temporary password and login link (e.g., <https://xyz.teammanager.ng/accounts/login>).
- Option 2: **Self-Registration**:
  - Share a company-specific signup link (e.g., <https://xyz-cloud.teammanager.ng/register>).
  - Staff complete the registration form with their details.
  - Accounts would require admin approval, this is to ensure security within your company.
  - Accounts can be activated by going to **Admin Dashboard > Users (View Users)**. Here there is an **Activate** button on the list of users

### 3. Staff Onboarding:

- Staff log in using their credentials or Single Sign-On (if configured).
- They can fill in their staff profile in the **My Profile**, including:
  - Personal details (name, bio, photo).
  - Contact information (email, phone)..
  - If not completed, details can still be partially saved.
- Staff can access features like documents, folders, tasks, and the calendar, based on their permissions.

### Permissions:

- Staff can only access some data within their department or team.
- Admins can manage user accounts, assign roles, and approve registrations.

**Tip:** Use the **Performance Dashboard** to monitor staff account activity and ensure onboarding completion.

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## Creating Zoho Email for Email Automation

To enable email automation in TeamManager, allowing your staff to receive account registration, activation, and notification emails, you need to set up a Zoho Mail account if one doesn't already exist. This can be done individually by staff for personal use, or the company can create and host a centralized emailing system under Zoho Mail for professional, custom-domain emails (e.g.,

info@yourcompany.com). Zoho Mail offers a free plan with 5GB storage for up to five mailboxes, making it accessible for small teams, while paid plans provide more features for larger organizations.

Using Zoho Mail integrates seamlessly with TeamManager's email configuration in the admin settings, where you'll enter your Zoho email address and password to enable automated sending.

## Steps for Creating Zoho Email

### Option 1: For Individual/Personal Use (Free Plan)

1. **Visit the Zoho Mail Website:** Go to <https://www.zoho.com/mail/> in your web browser.
2. **Sign Up for Free:** Click the **Sign Up for Free** button on the homepage. This will direct you to the registration page (or pricing overview).
3. **Fill in Your Details:**
  - Enter your email address (this will be your initial login email; you can set up custom ones later).
  - Provide a strong password.
  - Enter your name, phone number, and any other required information.
  - Agree to the terms of service and privacy policy.
4. **Verify Your Account:** Check your inbox for a verification email from Zoho and click the link to activate your account.
5. **Set Up Your Mailbox:** Log in to your new Zoho Mail dashboard. You can start using the free plan immediately, which includes 5GB storage and basic features.
6. **Configure in TeamManager:** Once set up, go to your TeamManager settings (Settings > Email Configuration), enter your Zoho email address and password, and save. This enables email automation for your tenant.

### Option 2: For Company/Business Use (Custom Domain)

For a professional setup, use Zoho Mail's business plans to host company emails with a custom domain (e.g., yourcompany.com). This is recommended for teams to maintain branding and centralized control.

1. **Visit the Zoho Mail Website:** Go to <https://www.zoho.com/mail/> in your web browser.
2. **Sign Up for Free or Choose a Plan:** Click **Sign Up for Free** or navigate to the pricing page (<https://www.zoho.com/mail/zohomail-pricing.html>). Select a plan:
  - Free: 5GB storage for up to 5 mailboxes (suitable for small teams).
  - Paid plans (starting from affordable rates): Unlimited storage, advanced features like e-Discovery, and support for more users. Review pricing for details.
3. **Register or Use an Existing Domain:**
  - If you don't have a domain, purchase one through Zoho or a third-party registrar (e.g., GoDaddy).
  - Enter your domain name during signup (e.g., yourcompany.com).
4. **Fill in Company Details:**
  - Provide your organization name, admin email, password, and contact information.
  - Agree to the terms.
5. **Verify Domain Ownership:**
  - Zoho will guide you through verification methods (e.g., adding a TXT record to your DNS settings or uploading an HTML file to your website).
  - This step ensures you own the domain and can set up custom emails.
6. **Set Up Mailboxes and Users:**

- Log in to the Zoho Mail Admin Console (<https://www.zoho.com/mail/control-panel.html>).
- Add users (e.g., [staff@yourcompany.com](mailto:staff@yourcompany.com)) and assign mailboxes.
- Configure group aliases, policies, and retention settings as needed for email automation.

**7. Configure in TeamManager:**

- In your TeamManager admin settings (Settings > Email Configuration), enter a dedicated Zoho email address (e.g., [notifications@yourcompany.com](mailto:notifications@yourcompany.com)) and its password.
- Test the setup by sending a sample email or inviting a staff member to verify automation works.

Once your Zoho Mail is configured, TeamManager's email automation will handle staff notifications automatically, streamlining your onboarding process.

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