



How to create and share an invite list

There are two methods for inviting participants to a case; both can be found under the **People** tab. To gain access to a case, you must be invited by the case creator or a current user who has **Invite People** permission. An individual user can be invited to a case via the **Invite New Participant** option. A group of users can be granted access to a case simultaneously via the **Invite A List** option. To grant access to a group of users, you must first pick from a pre-existing list or define a new list.

Create a List

To grant access to a group of users, you must first pick from a pre-existing list or define a new list. Create a new list and view existing lists from the **Invite Lists** tab on your top menu. Select **Create a New Invite List**, name your list and select **Create**. Your new list will appear on the **Invite List** page. From here, you will need to define your users—select **View Invitees**.

The first screenshot shows the 'Invite Lists' tab selected in the top navigation menu, with a 'Create New Invite List' button highlighted. The second screenshot shows the 'Create a new Invite List' form with a 'Name' input field and a 'Create' button. The third screenshot shows the 'Invite Lists' table with a new list, 'All Cases Invite List', added to the bottom.

Select, **Add New Invitee** and enter the details for the user you wish to include on the list. Select **Add**. Continue with this process until you have entered your entire list. You can edit your list by selecting **Change** or **Remove**.

The first screenshot shows the 'Add New Invitee to All Cases' form with fields for Title, First Name, Last Name, and Email Address, and an 'Add' button. The second screenshot shows the 'Invite List for All Cases' table with a new invitee added to the list. The third screenshot shows the 'Add New Invitee' form with fields for Title, First Name, Last Name, and Email Address, and an 'Add' button.

Share an Invite List

Once a list is created, you can share it with other users who will need the list for their cases. Select the **Share** button next to your Invite list. Enter the usernames of the people you want to share the list with. You can share a list with up to five users—select **Share**.

The first screenshot shows the 'Share Invite List' form with five 'User Name' input fields and a 'Share' button. The second screenshot shows the 'Invite Lists' table with a 'Share' button highlighted next to the 'All Cases Invite List'.