Workspace Settings

Quick Reference Guide

In each Workspace, you can amend the Workspace Settings from the top left corner.

Workspace Settings

1. Role Settings

You can act in multiple roles in a Workspace.

From the **Role Settings Panel**:

- Click **Edit**
- Select the **Role** to add into the Workspace
- Add your new **Subscriber Reference** (if applicable)
- Click **Add Role**
- Click Save.

  You can switch between the roles through **Workspace Settings** or the **Dashboard**

  Note:

  Complete the same steps if you have created or accepted an invitation into the Workspace in an incorrect role.

2. Allocate Workspace to Workgroup

You can allocate your Workspace to another Workgroup/s and remove it from the existing Workgroup if incorrectly assigned.

From **Allocate Workspace to Workgroup Panel**:

- Click **Edit**
- Select the appropriate Workgroup
- Click **Allocate to Workgroup**
- Click Save.

  Note: you can allocate to Workgroups you do not have access to
- **Note**: your Workspace can be part of multiple Workgroups.

3. Transaction Settings

You can edit the transaction settings (i.e. the Transfer/Commercial flags). From the **Transaction Settings Panel**:

- Click **Edit**
- Change your selections as required
- Click Save.

4. Global Settings

You can change your Workspace Reference and Privacy status.

- Click **Edit**
- Change your **Subscriber Workspace Reference** and/or **Privacy status**
- Click Save.

Note: Inviting participants into the Workspace reverts it to **Public** status.

For more information visit:

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