Adding Users and Starting Their PDD

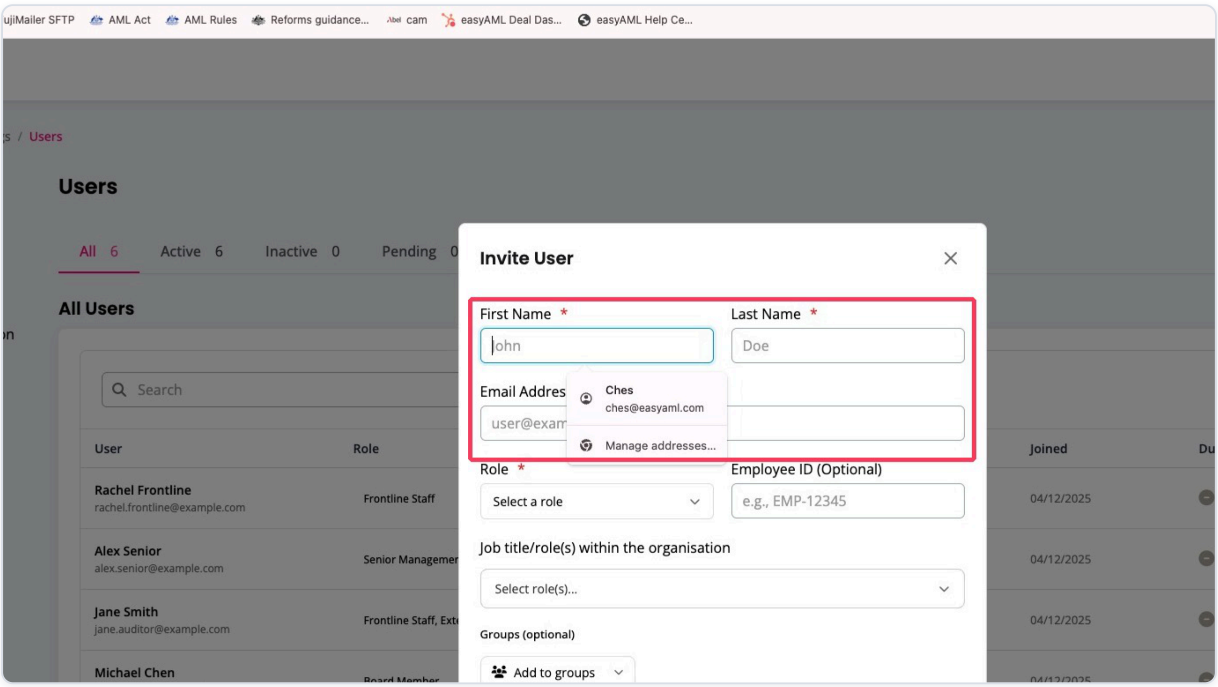
PDD-02 · Version 1.1

New staff are invited from Account Settings, then put through Personnel Due Diligence once they've activated their account. This guide covers the invite, common invite issues, starting the DD, and managing users afterwards.

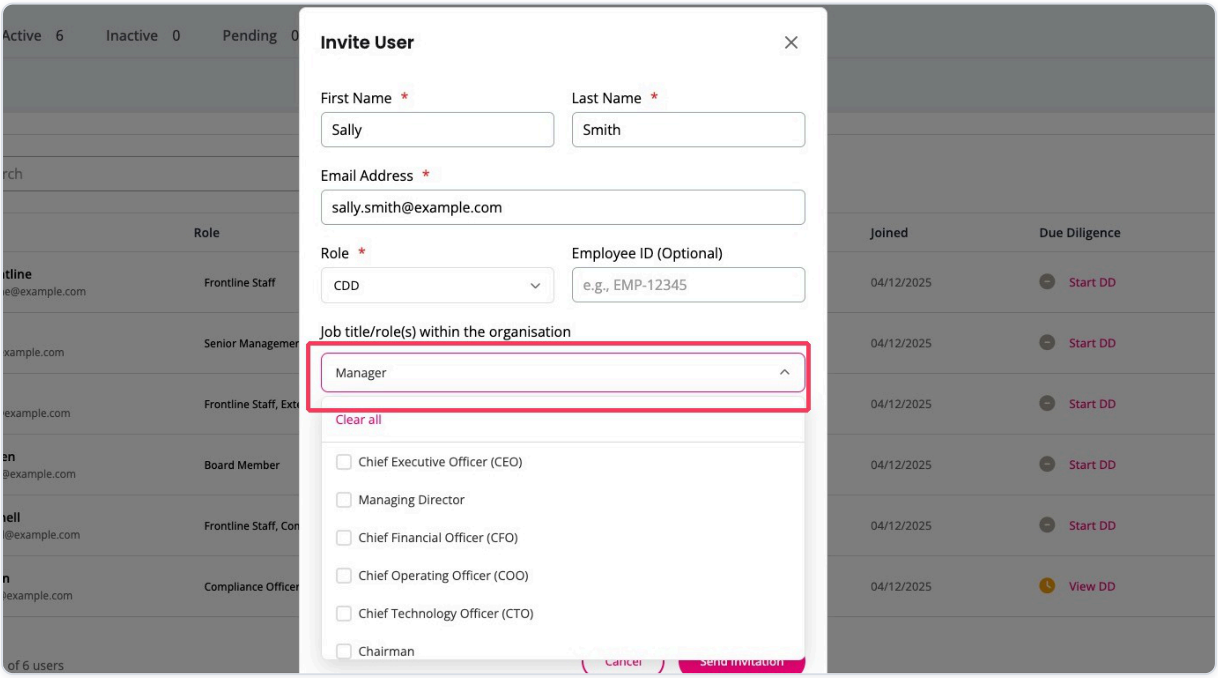
OPEN TO START `https://app.easyaml.com/settings/account`

Invite a new user

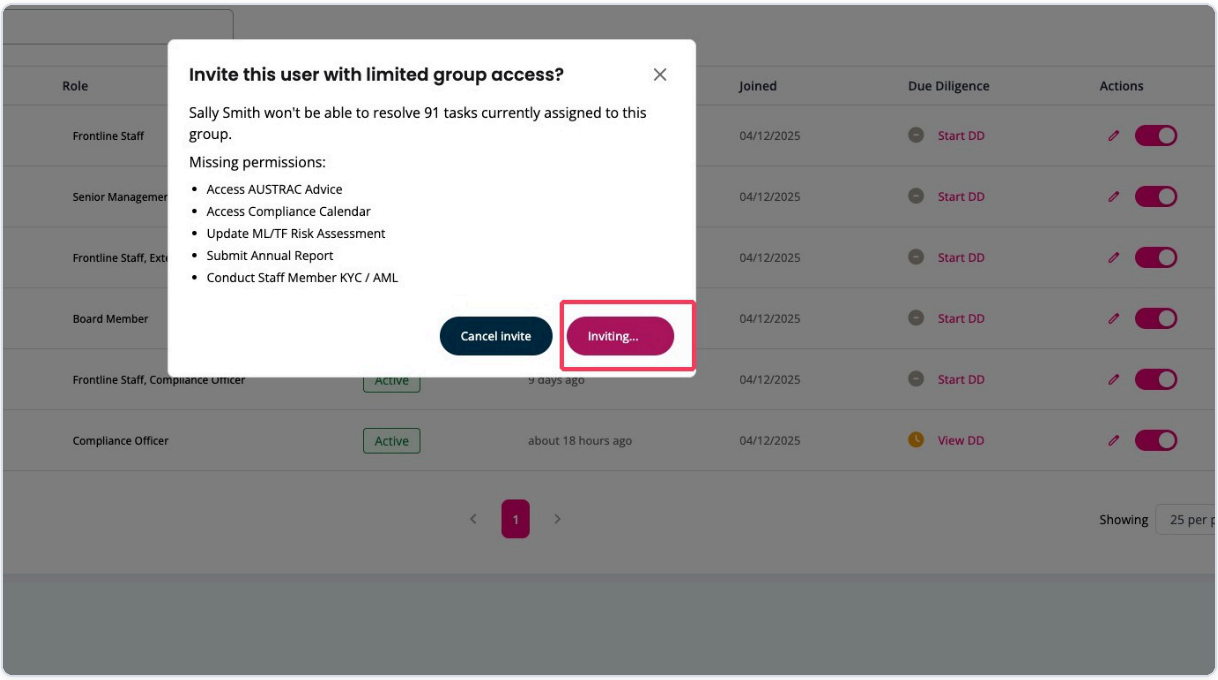
1 Go to **Account Settings → Users**, then click **+ Invite User**.



2 Enter their **First Name, Last Name and Email Address**; select a **Role** (their AML role) and **Job Title** (within your organisation). Optionally add an Employee ID, assign Groups, or include a custom message. The invite sends automatically.



3 If you assign the user to a Group with a Role that doesn't allow full access to Group settings, you'll get a warning — proceed with limited access, or adjust the role.

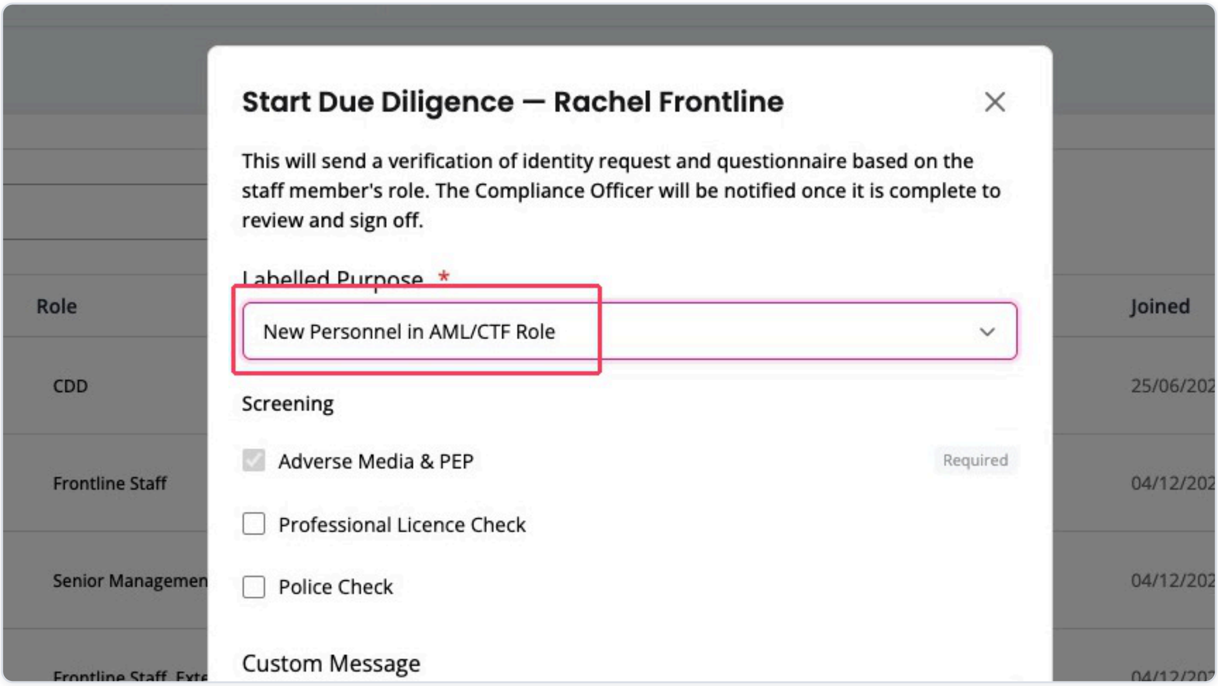


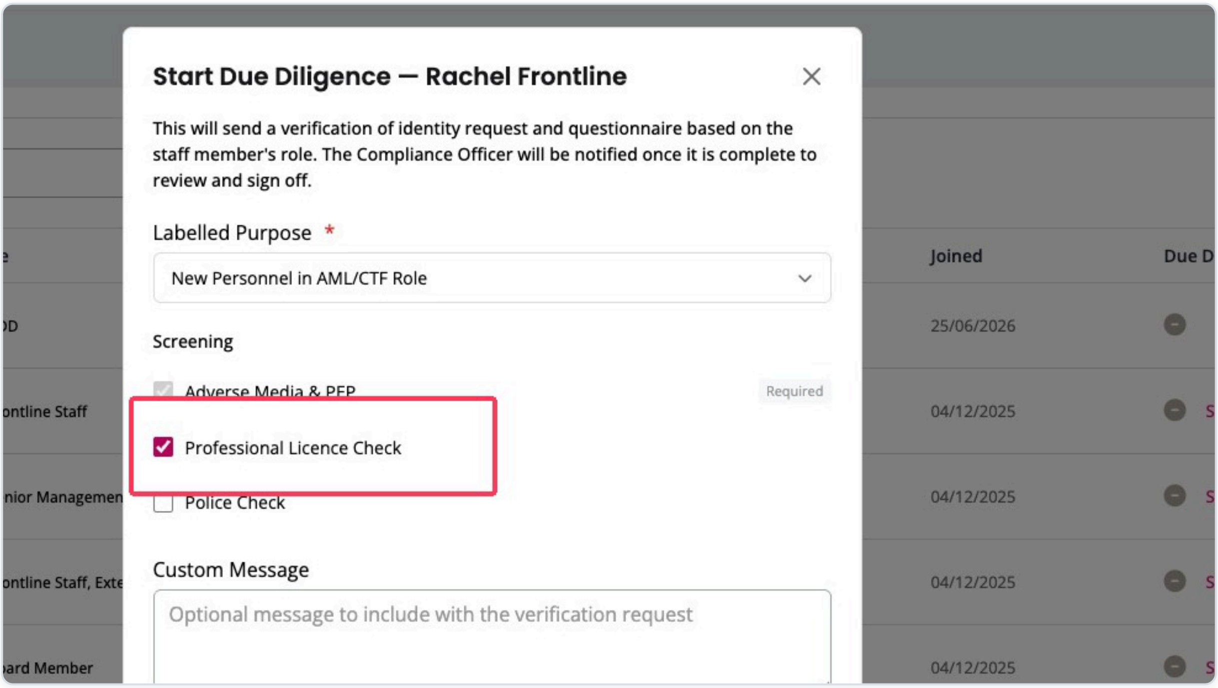
4 Invite not received, deleted, or expired? Invite emails expire after one week for security. Click the **envelope** icon in the user's row to resend.

Start their Personnel Due Diligence

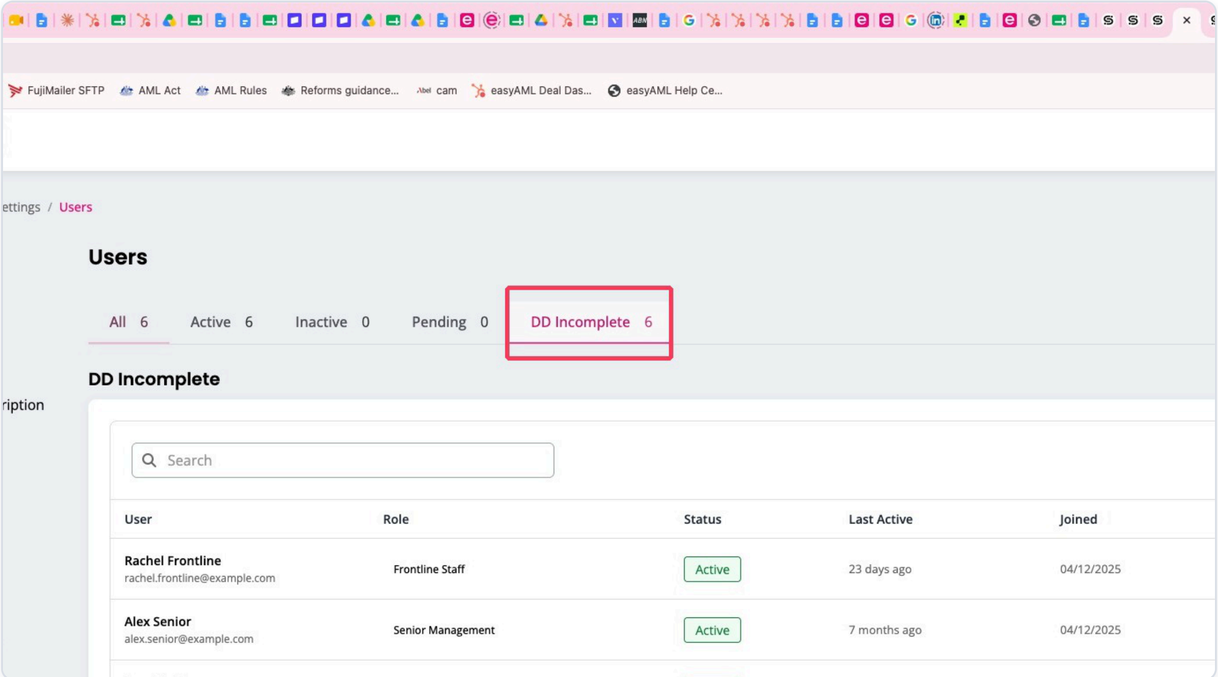
1 Once the user has accepted the invite and logged in, click **Start DD** in their row.

2 In the pop-up, set the **Labelled Purpose** (generally *New Personnel in AML/CTF Role*), tick any optional screening — Professional Licence, Police Check — add a custom message if needed, and click **Start DD**. For reviewing and signing off the assessment, see the companion guide *Completing Personnel Due Diligence*.



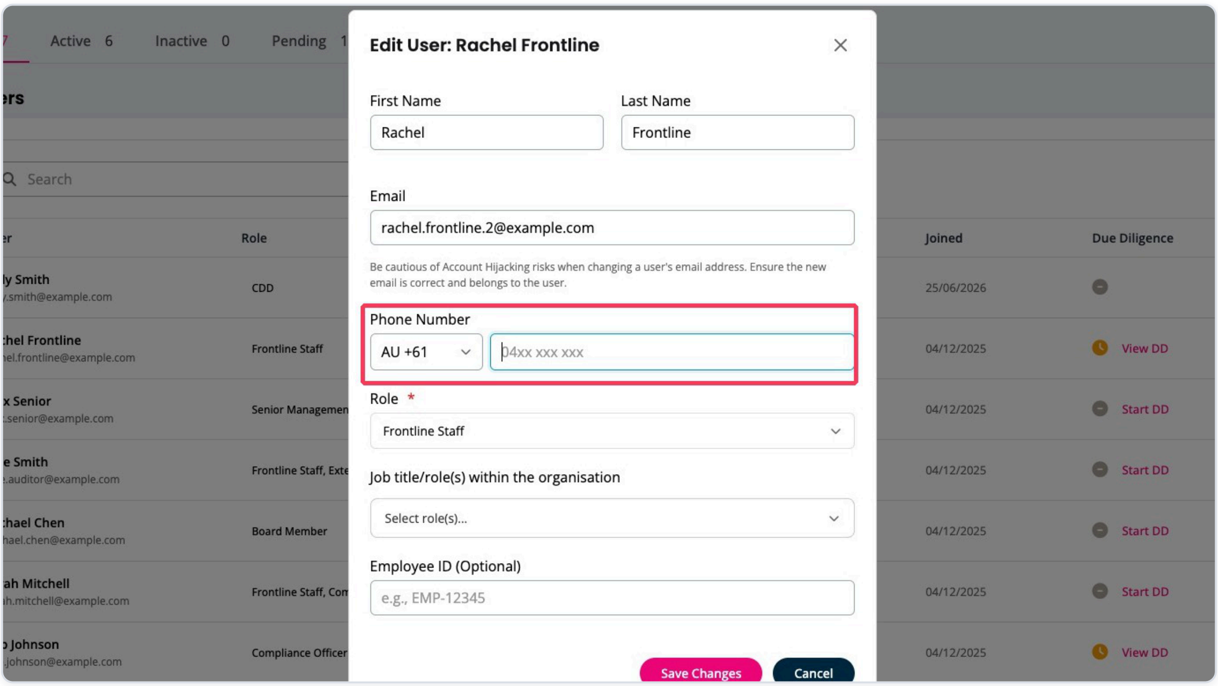


3 To see who still hasn't completed, select the **DD Incomplete** tab — the number beside it is the outstanding count.

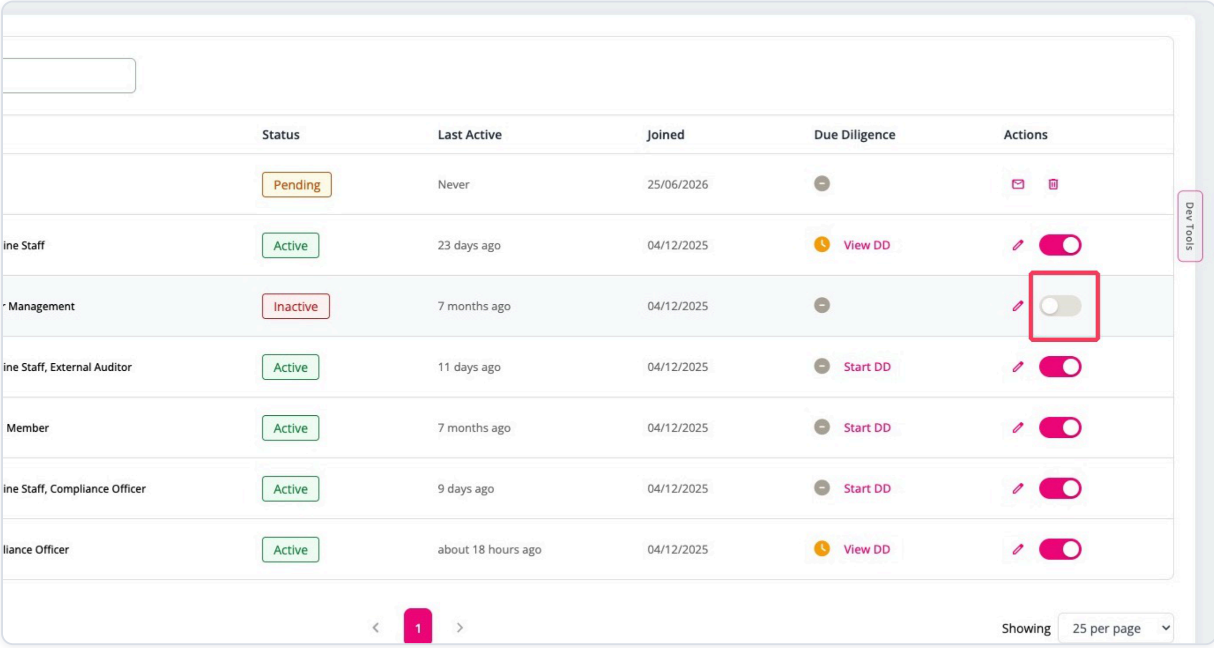


Manage users afterwards

1 Use the **Active** tab to view active users. Click the **pencil (edit)** in a row to update profile information, contact details and roles, then **Save Changes**.



2 Use the **status toggle** to grant or remove access: pink means the user can access the system; grey means they cannot log in.



> *Sole trader with no staff? If the "Add Users" task doesn't apply to you, it can be dismissed — you don't need to invite anyone to complete setup.*

More ways to get help

- **In-platform:** the "Want Help?" button on each page opens the relevant walkthrough.
- **Knowledge Base:** https://knowledge.easyaml.com/add-users-and-complete-personnel-due-diligence-pdd
- **Video walkthrough:** https://scribehow.com/o/PKpOki2kThyzGwDRLEXASw/viewer/Add_Users_and_complete_Personnel_Due_Diligence_PDD__0f82eb7d