WEALTH STAKR

HOW-TO GUIDE

Practice MD: setting up your practice

Invite your team, give them the right roles, set up leave rules and approvers, and add your practice logo.

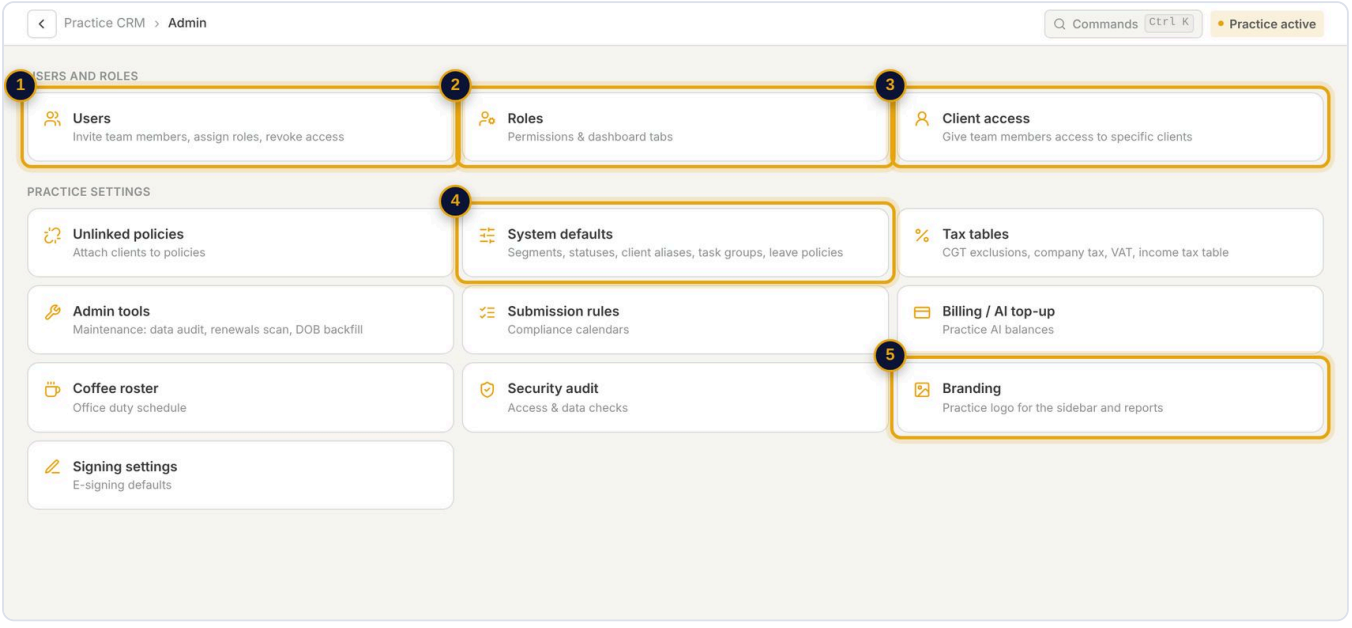
For: Practice MDs **Time:** About 30 minutes for a first set-up

Before you start

- You must be signed in with the Practice MD role. Only the Practice MD can invite users, change roles and edit role permissions (Head Office and Super Admin can also manage roles).
- A list of your team: each person's work email address and what they do (adviser, adviser who also administers other advisers' books, administrator, HR, marketing).
- Your practice's leave policy (days per leave type) and, if you are moving from another system, an export of existing leave.
- Your practice logo as an image file, no bigger than 5 MB.

1. Open Admin

All practice set-up lives under **Admin** in the sidebar. **Admin › Overview** shows every admin screen as a tile; the same screens are listed under the Admin group in the sidebar.



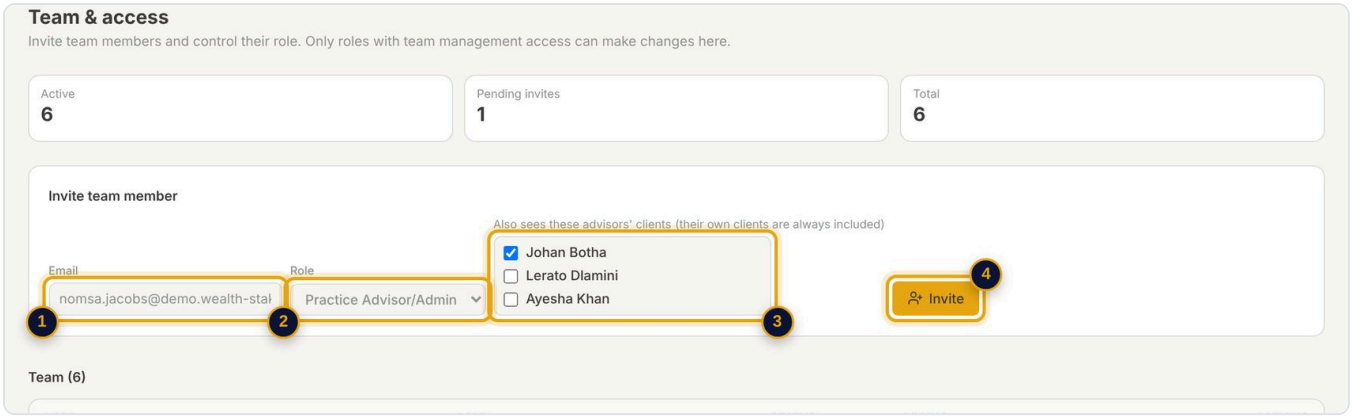
Admin › Overview. Users and roles come first, then practice settings.

1. **Users**: invite people, change their role and revoke access (section 2).
2. **Roles**: what each role can see and do, including leave approval and dashboard widgets (section 3).
3. **Client access**: give one person access to a specific client (section 4).

4. **System defaults**: includes your leave rules (section 5).
5. **Branding**: your practice logo (section 7).

2. Invite your team

Go to **Admin › Users** (the page is titled **Team & access**). Every invitation is sent by email; the person sets their own name and password when they accept.



Inviting an Advisor/Admin who also looks after Johan Botha's clients.

1. Under **Invite team member**, type the person's work address in **Email**.
2. Choose their **Role**. The six standard roles are **Practice MD**, **Practice Advisor**, **Practice Advisor/Admin**, **Practice Administration**, **Practice HR** and **Practice Marketing**. Add-on roles (**Co-Sec and Trusts**, **Estates**) and your own bespoke roles appear below them.
3. If the role works with other advisers' clients, tick the advisers. For **Practice Advisor/Admin** ("Also sees these advisors' clients") you must tick at least one; their own clients are always included. For **Practice Administration** ("Limit to these advisors' clients") leave it empty to give access to the whole practice.
4. Click **Invite**. A green message confirms the email was sent, with a **Copy invite link** button.

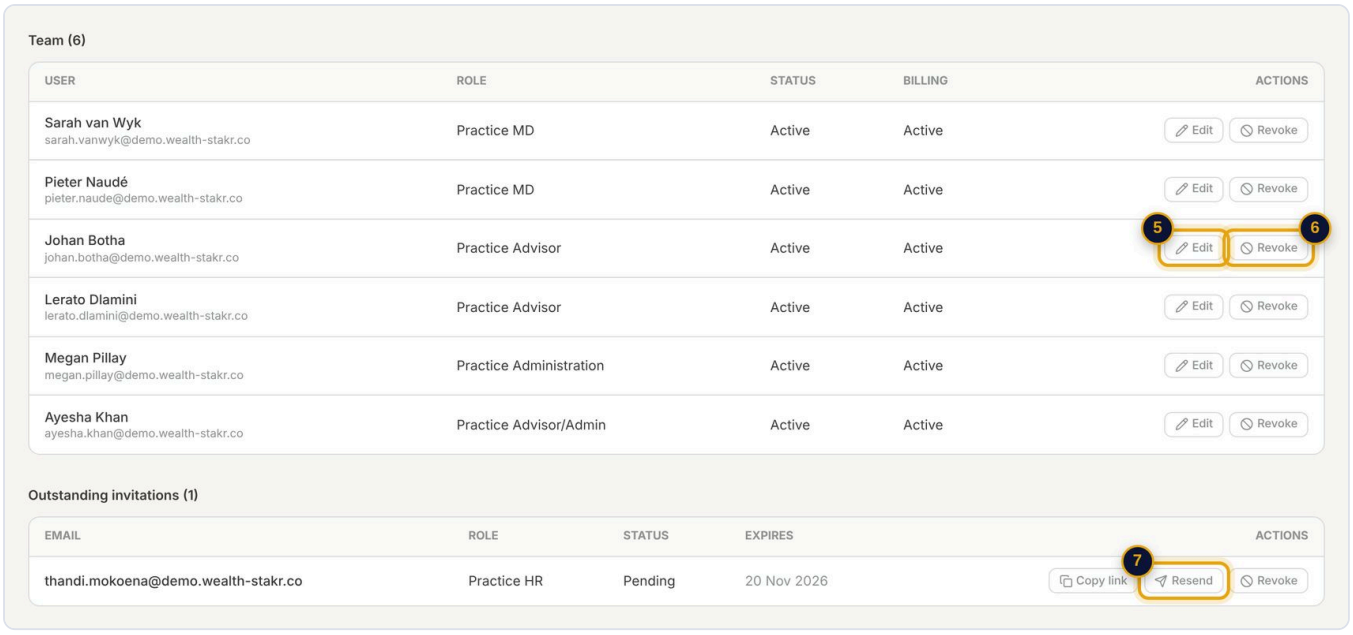
TIP Add your advisers first. The adviser list only shows active Practice Advisor and Practice Advisor/Admin members, and says "No advisors on the team yet" until there are some.

TIP If the message is red and says the invitation was not delivered, click **Copy invite link** and send the link to the person yourself.

TIP Someone who is already an active member cannot be invited again. Use **Edit** on their row instead.

TIP Every active member is a billable seat. A role that includes My Earnings is charged as an advisor seat.

3. Manage people already on the team



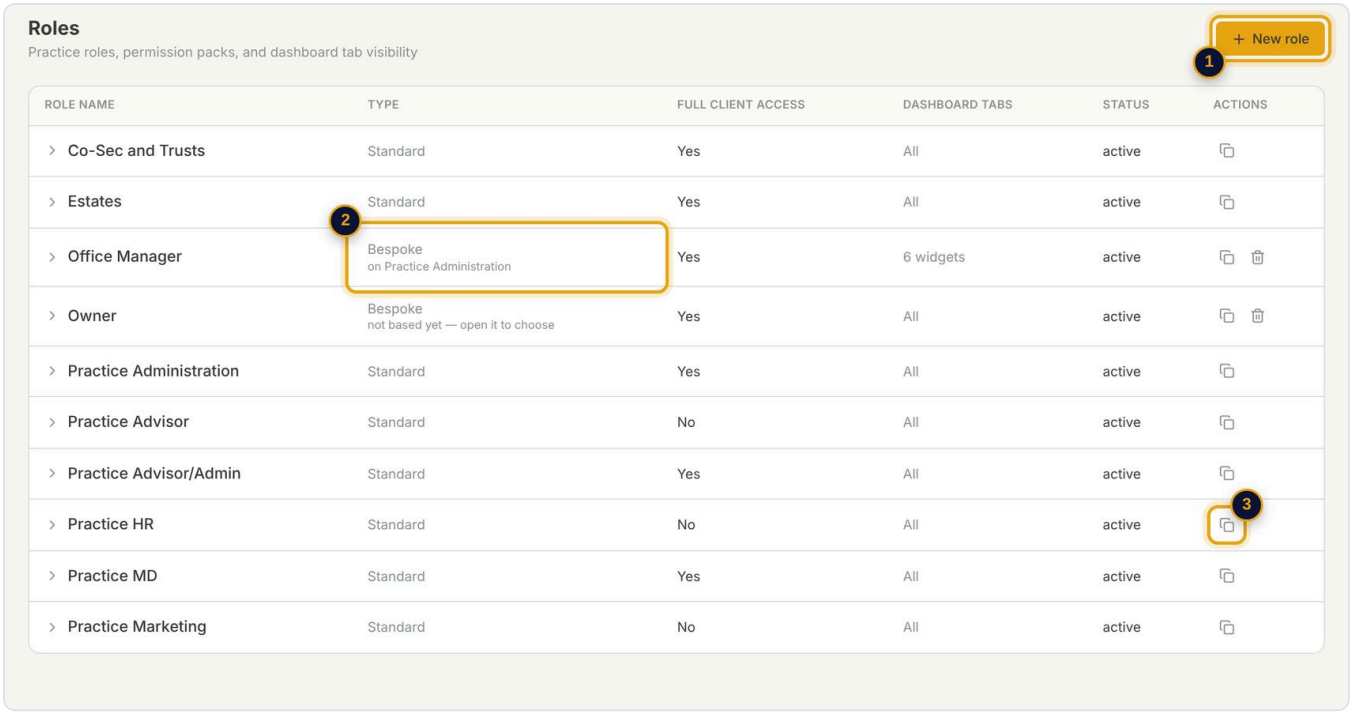
The Team list and Outstanding invitations.

1. 5 To change someone's role or linked advisers, click **Edit** on their row, make the change and click **Save**.
2. 6 To remove someone's access, click **Revoke**. To bring them back later, click **Reinstate**, check the role and click **Reinstate** again.
3. 7 Under **Outstanding invitations**, check the **Expires** date. Click **Resend** to send a fresh link (the old one stops working), **Copy link** to share it yourself, or **Revoke** to cancel the invitation.

TIP If a reinstated person shows that their seat is waiting for the practice's debit order, they have no access until billing covers the seat.

4. Set up roles and permissions

Go to **Admin › Roles**. **Standard** roles are defined centrally and cannot be edited here. To change what a role can do, make a **Bespoke** role and give it to people instead.



The Roles list. Office Manager is a bespoke role based on Practice Administration.

1. To start from scratch, click **New role**, enter a **Name** and **Description**, choose what it is **Based on**, and click **Create**. The new role starts with no permissions.
2. The **Type** column shows **Standard** or **Bespoke** and what a bespoke role is based on. A bespoke role that is "not based yet" cannot be given to anyone until you open it and choose a base.
3. To start from an existing role, click its copy icon. A copy called "<role> (Copy)" appears in the list for you to open and rename. Inside a standard role you can also click **Copy to bespoke role**.

TIP **Based on** offers every standard role except Practice MD. Someone who should be an MD gets the Practice MD role itself.

TIP The base decides whether people with the role must be linked to advisers: a role based on Practice Advisor/Admin must have at least one linked adviser.

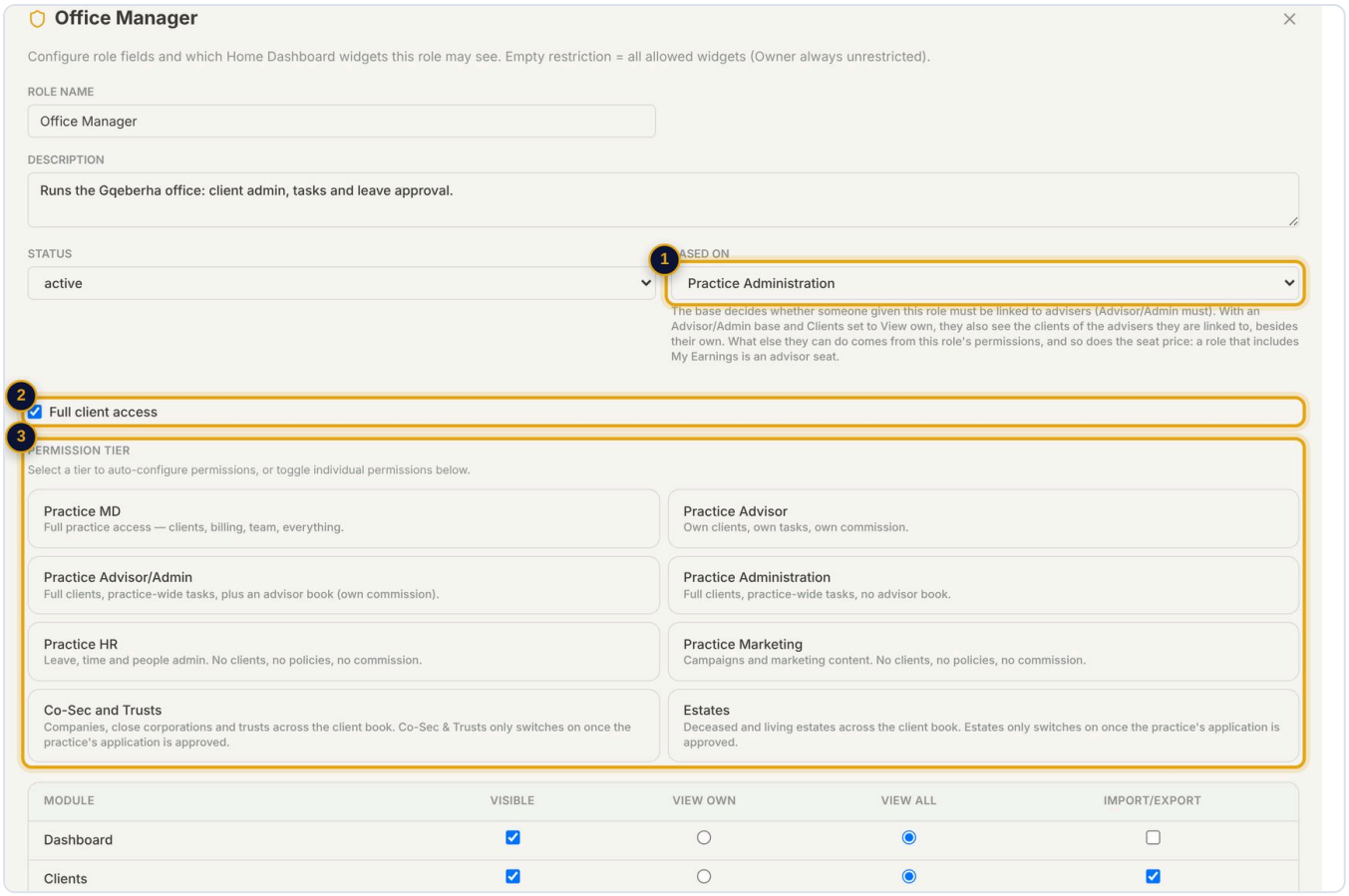
TIP Add-on modules (Co-Sec & Trusts, Estates) cannot be ticked on a bespoke role. Give people the standard **Co-Sec and Trusts** or **Estates** role. These only switch on once your practice's application for the add-on is approved.

TIP If **Add standard roles** shows at the top, some standard roles are missing from your practice. Click it to add them; your own roles stay as they are.

TIP To delete a bespoke role, click the bin icon. If people still hold it, choose a role to move them to and click **Reassign & delete**.

5. Choose what a bespoke role can do

Click a role's name to open it.



The top of a bespoke role: base, client access and the permission tier presets.

1. Check **Based on**. The text under it explains what the base controls.
2. Tick **Full client access** if this role may see every client in the practice.
3. To fill the permissions quickly, click one of the **Permission tier** cards (for example **Practice Administration**). This replaces the ticks below, which you can then adjust.

6. Set permissions, leave approval and dashboard widgets

Below the tier cards is a row for every module, with **Visible**, **View own**, **View all** and **Import/export**. Untick **Visible** to hide a module from the role entirely.



The Time Off row, with Can approve leave ticked.

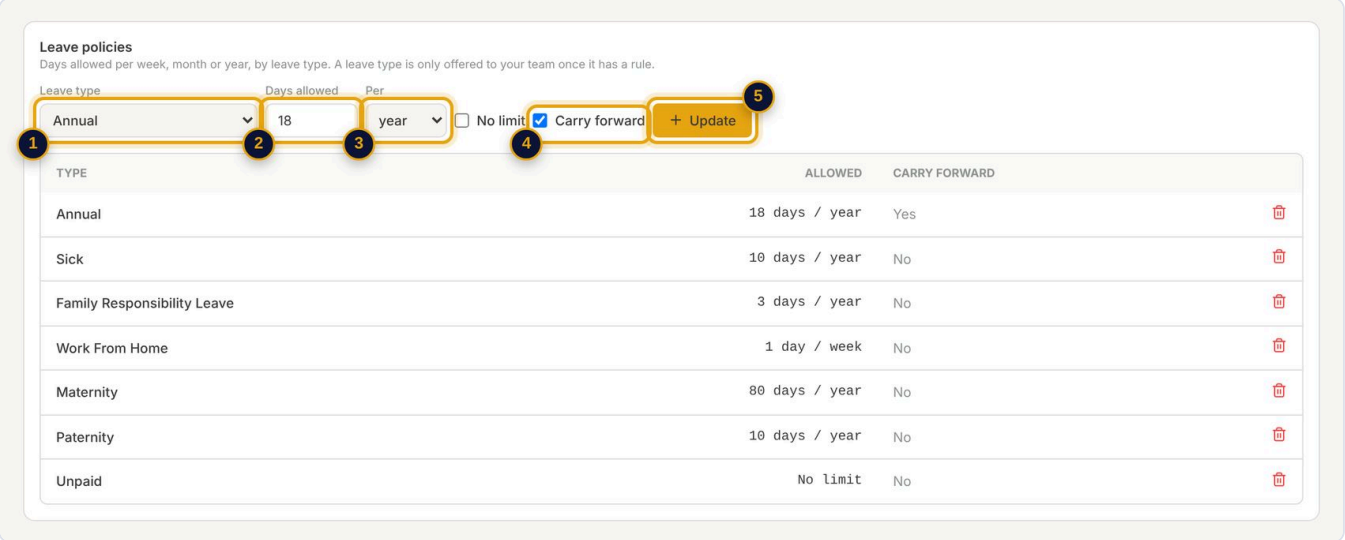
1. For each module, tick **Visible**, then choose **View own** (only their own records) or **View all** (the whole practice). Tick **Import/export** only where the role needs it.
2. On the **Time Off** row, tick **Can approve leave** for anyone who should approve or reject leave, book leave for others, upload leave and set leave rules. Untick it to take that right away.
3. Under **Home Dashboard — tab visibility**, tick **Restrict widgets** and choose which dashboard widgets this role sees. Leave it unticked to allow every widget the role's permissions permit.
4. Click **Save role**.

TIP On the **Chats** row, **Can create group chats** controls who may create group chats.

TIP Out of the box, the Practice MD and Practice HR roles can approve leave.

7. Set your leave rules

A leave type is only offered to your team once it has a rule. Rules are at **Admin › System defaults**, in the **Leave policies** section at the bottom (or click **Policies** on the Leave management page). You need **Can approve leave** to change them.



Leave policies in System defaults.

1. Choose a **Leave type**: Annual, Sick, Work From Home, Maternity, Paternity, Family Responsibility Leave or Unpaid. Choosing a type that already has a rule loads that rule.
2. Enter **Days allowed**, or tick **No limit**.
3. Choose **Per**: week, month or year. One work-from-home day a week is a weekly rule.
4. For a yearly rule, tick **Carry forward** if unused days roll over.
5. Click **Add** (or **Update** for an existing rule). To remove a rule, click its bin icon; your team can then no longer request that type.

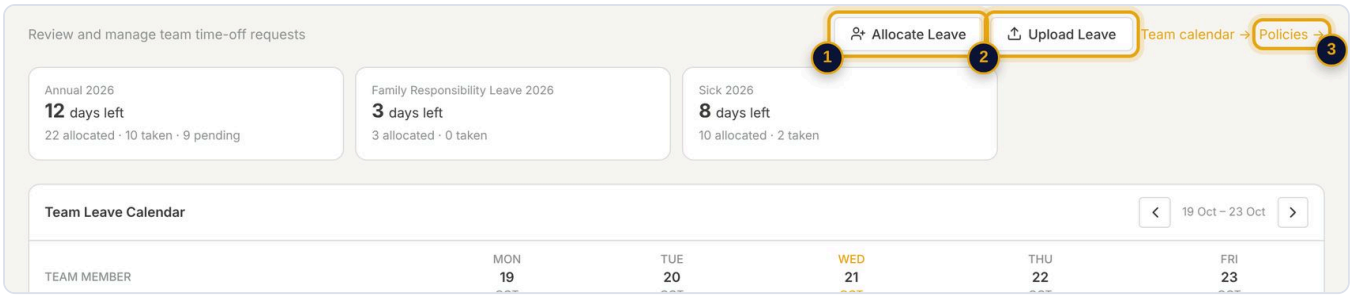
TIP With no rules yet, **Seed SA defaults** adds Annual 15 days a year (carry forward), Sick 10 days a year and Family Responsibility 3 days a year. Adjust them to your policy.

TIP The yearly rule for Annual, Sick and Family Responsibility Leave is each person's entitlement for the year, shown as "allocated" on their balance cards.

TIP Half Day Leave has no rule of its own: it counts against Annual leave.

8. Approve, book and upload leave

Go to **Time & Leave › Leave management**. People with **Can approve leave** see extra buttons.



Leave management as seen by an approver.

1. To book leave for someone, click **Allocate Leave**, choose the **Employee**, **Leave Type**, **Start date** and **Number of days**, add **Notes** if needed and click **Allocate Leave**. Weekends are skipped and the leave goes on the calendar as approved.
2. To bring in leave from another system, click **Upload Leave**, then **Download template**. Fill in one row per leave entry (columns Employee, Start Date, End Date, Leave Type, Days, Status, Note, Reviewed By, Review Note), choose the file (.xlsx, .xls or .csv), click **Check file**, review what will load, then click **Load**.
3. Click **Policies** to jump to the leave rules.
4. Pending requests in the request lists have **Approve** and **Reject** buttons for approvers.

TIP Leave that goes over a rule is still booked or requested, but is flagged for review, and everyone who can approve leave is emailed about it.

TIP Rows already in the app are skipped on upload, so the same file can be uploaded twice safely. Rows that cannot load are listed with the reason.

TIP The template has two extra sheets listing the exact leave type names and your team's names, so you do not have to guess spellings.

9. Add your practice logo

1. Go to **Admin › Branding** and click **Upload logo**.
2. Choose an image file (for example PNG, JPG or SVG) no bigger than 5 MB and no larger than about 4,000 × 4,000 pixels. Empty margins around the artwork are trimmed automatically.
3. The logo appears at the top of your sidebar and on generated reports. Click **Remove** to take it off.

TIP Colours are not set by the practice. Your organisation's Head Office chooses the colour scheme for its practices.

10. Other admin areas

You will find these under **Admin** when you need them: **Unlinked policies** (attach clients to imported policies), **Tax tables** (CGT exclusions, company tax, VAT and the income tax table used by calculators; Practice MD only), **System defaults** (also policy sections and categories, client segments, task statuses, client aliases, task groups and admin time categories), **Security audit** (access and data checks), **Admin tools**, **Submission rules**, **Billing / AI top-up**, **Coffee roster** and **Signing settings**. Bulk imports of clients and policies are done with **Import** on the Clients and Policies pages.

Questions

Why can't I pick my new bespoke role on the Users screen?

It has no base yet. Open it in Admin › Roles, choose Based on, and save. It then becomes available.

Can I edit a standard role's permissions?

No. Standard roles are managed centrally. Copy it to a bespoke role, adjust that, and give people the bespoke role.

Who approves leave?

Anyone whose role has Can approve leave ticked on the Time Off row in Admin › Roles. By default that is the Practice MD and Practice HR.

My team can't request Work From Home.

That type has no rule yet. Add one in Admin › System defaults › Leave policies (for example 1 day per week).

Someone never received their invitation.

In Admin › Users, under Outstanding invitations, click Resend, or Copy link and send it to them yourself.

Can I change the practice colours?

No. The practice sets its logo; Head Office sets the colour scheme.

How do I give someone access to one client they don't normally see?

Admin › Client access: choose the client, enter the person's email, choose the level (view, edit or full_access) and click Grant.

Ask Stakr

Stuck? Open **Ask Stakr** in the sidebar and ask in your own words, for example:

- How do I invite a new adviser to my practice?
- How do I let our office manager approve leave?
- How do I create a bespoke role?
- How do I set up work-from-home days as a leave rule?
- How do I upload our existing leave records?