Family Portal Access

Utilize these instructions to grant access for an individual to the Family Portal

- ☻ Click on "Clients" from the main SwyftOps tool bar.
    - ➢ Locate the client that is requesting an individual to be added to their Family Portal.
    - ➢ Click "Edit" on the desired client.

- ☻ Click the drop-down arrow next to "General Info" and select "Family Portal".

- ☻ Click "Add New".
    - ➢ Enter the email for the individual who is being granted access and click "Next".
    - ➢ A separate email must be used for each new entry/individual.
    - ➢ Enter the first and last name of the individual who will access the Family Portal.
    - ➢ Click "Confirm".

- ☻ The individual will then receive an email invitation with a link to click which will then allow them to create their password.

- ☻ To access the Family Portal, they will go to https://swyftops.family/
    - ➢ Access is also available through the SwyftOps website, https://swyftops.com , and clicking the Family Portal link at the top of the screen.
    - ➢ The individual will enter their email and password to gain access.

- ☻ If the user would like to edit their profile, they can click on their name.
    - ➢ Ability to edit the name is available.
    - ➢ Add a phone number.
    - ➢ Click Save.

- ☻ For guidance on how to use the Family Portal's features, any user can click "Tutorial" to access a walk-through instructional video.

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