Team invitations

Inviting teammates, seat types (Assistant and RCIC), per-member module access, RCIC self-attestation, password resets, and the billing implications of adding or removing seats.

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What team invitations are for

Most firms run on more than one person. Team invitations let the Owner add Assistants and additional RCICs to a single tenant so the whole firm sees the same bookings, the same agreements, the same Transfer Rooms, and the same Stripe account. Each teammate gets their own sign-in, their own profile, their own headshot, their own signature, and can be the named RCIC of record on agreements when their seat type and attestation permit. The platform handles the billing layer (per-seat charges added to your Premium subscription), the access layer (Owner picks which modules each teammate sees), and the credentials layer (Owner triggers password resets when a teammate offboards or loses access).

> **Note**: Team invitations live under Settings ’ Team. Only the Owner sees and can act on this card; other roles can view the page but the invite controls are hidden for them.

When you need a team

Solo practitioners can run the platform with a single Owner account and never touch this card. You add teammates when the work crosses one person's capacity: when an Assistant handles intake while the RCIC focuses on representations, when two RCICs share a practice and need to see each other's matters, when a paralegal needs to draft Service Agreements but not sign them, or when a billing clerk needs to manage Single Bills without touching anything else. Team Mode is part of Premium; the per-seat charge is added to your Premium subscription cadence.

Seat types and pricing

Two seat types exist: Assistant and RCIC. Both are billed monthly per seat. Assistant is the cheaper tier and is the right choice for paralegals, billing clerks, intake coordinators, and anyone on your team who is not personally regulated. RCIC is the higher tier and is required for any teammate who needs to be the named regulated consultant on a Service Agreement, countersign an agreement, manage participants on a Transfer Room, mark a service as CICC-compliant on the booking page, or carry any other CICC-gated responsibility. The seat type is not just a label; the platform enforces the gating behaviours server-side.

The Owner picks the seat type at invitation time. Promoting an Assistant to RCIC later is a one-click change on the Team card; the per-seat charge adjusts on the next billing cycle and the teammate is then permitted to complete their RCIC self-attestation from My Profile. Demoting an RCIC to Assistant works the same way in reverse, but the platform pre-flights the demotion against any Service Agreements that name them as the RCIC of record and any Transfer Rooms they currently manage; if there are open obligations, the demotion surfaces a warning so you can reassign first.

Inviting a teammate

Open Settings ’ Team and click Invite a teammate. The form asks for the teammate's email, a display name (which they can change after they accept), and a seat type. Submit; the platform mints a tokened invitation, emails the teammate a click-through link, and shows the invitation in your roster as Pending until they accept. If you are about to push your seat count past your current paid seat allotment, the form shows an amber callout warning that the new invitation will add a paid seat on your next invoice and asks you to confirm. If you cancel out, no invitation is sent and your seat count is unchanged.

The invitation email

The teammate receives an email from your firm (your branding on the From-line) explaining that you have invited them to join your workspace on RCIC App. The email has two buttons: Accept (which lands them on a sign-up or sign-in flow tied to the invitation token) and Decline (which clears the invitation server-side and sends you, the Owner, a notification with the decliner's email as Reply-To so you can follow up if you want). If the teammate ignores the email, the invitation expires automatically after a generous window and a new one can be issued.

> **Note**: The invitation email's From-line carries your tenant brand, not Investatech's. If the teammate's spam filter is aggressive, the invitation may end up in their Junk folder; ask them to check there if Accept does not arrive within a few minutes.

Accepting and declining

Accept walks the teammate through a short flow: if they already have an account on RCIC App (in another firm), it warns that joining yours will not affect their other tenant and asks them to confirm; if they do not have an account, it creates one tied to the invitation email. Either way, the teammate lands on their own My Profile page after sign-in, with their display name pre-filled to the invitation, and they fill in headshot, role title, bio, and (for RCICs) the regulated-consultant attestation card. Decline is the lighter path: a one-click action that lets the teammate say no without explanation, with an optional message field if they want to add one.

Module access per member

Once a teammate has accepted, the Owner can pick exactly which modules they can reach. The Team card carries a Module access grid per teammate: every module has a checkbox; ticked means visible in their sidebar and app launcher, unticked means hidden entirely (the teammate cannot reach the URL even by direct navigation, and the module simply does not appear in their UI). Defaults are sensible per seat type (Assistants see most things but not regulator-gated surfaces; RCICs see everything), and the Owner adjusts from there. Some modules are always visible regardless of role (Store, Q&A) because hiding them gives no real privacy benefit; others (Service Agreements, Transfer Room, Active File Review) follow Rule 23 Premium-discovery where the icon stays visible for prospects but the working surface gates on access.

Promoting an Assistant to RCIC (and back)

Promoting an Assistant to RCIC is a per-row dropdown on the Team card. The next billing cycle adjusts the per-seat charge to the higher tier, and the teammate's profile then reveals the RCIC self-attestation card so they can complete their declaration (CICC register name, CICC ID, register URL, licence class and status, conditions). Until they attest, they cannot be the named RCIC of record on a Service Agreement; they hold the seat (and pay for it) but the regulator-gated actions stay locked behind the second-step attestation.

Demoting an RCIC to Assistant runs a pre-flight check: any Service Agreement that names this RCIC as the regulated consultant of record, any Transfer Room they manage, any pending countersignature on their queue surfaces as a warning before the demotion commits. If everything is clear, the demotion goes through and the seat charge drops to the Assistant rate next cycle. If there are open obligations, you reassign first (Service Agreements have a Change RCIC modal in the Builder; Transfer Room participant rosters can be re-managed by another verified RCIC).

Per-member tenant-wide Transfer Room viewer access

An Assistant who needs to read every Transfer Room in the firm (not just the rooms they are explicitly named on) can be granted tenant-wide viewer access from the Team card. The toggle is per-member, Owner-controlled, and only valid for paid Assistant seats. A viewer can read every room in your tenant, edit scalar fields on the Information Card on any room, write entries to the Matter Work Ledger on any room, and request AI ledger suggestions. They cannot send transfers on rooms they are not explicitly named on (the wide-access flag is a read envelope, not a send envelope; the per-room participant grant overrides it). They cannot add or remove participants, edit notification rules, or run structural Information Card operations like Pull from Service Agreement.

> **Note**: If the same Assistant is also added as an explicit tenant-side participant on a specific room (with Can upload or Primary contact ticked), they can send transfers on that specific room. The per-row participant grant takes precedence over the tenant-wide viewer flag for that one room.

Per-member can-purchase-from-store flag

Each teammate's Team card row carries a checkbox controlling whether they can spend tenant store credits. The default is off for new teammates; the Owner ticks the box when they want a specific teammate to be able to top up the store wallet or spend credits on AI-priced features. The flag gates spend, not visibility (the Store icon still appears in every teammate's launcher and sidebar so they can see what is on offer; only the Buy and Top up buttons gate on this flag). The Owner is always allowed to spend regardless of the flag's state on the Owner's row.

Sending a password reset to a teammate

Per platform policy, teammates cannot rotate their own sign-in credentials. The Owner triggers a password reset for any teammate from the Team card via a Send password reset button on the teammate's row. Clicking sends a Supabase-issued password reset email to the teammate's sign-in address; the teammate follows the link, sets a new password, and continues. There is no in-app email-rotation path for teammates; if a teammate truly needs to change their sign-in email (different from their display name or contact email), the Owner contacts the platform team to edit the auth row out-of-band.

Removing a seat

When a teammate offboards, the Owner removes their seat from the Team card via a Remove button on their row. The platform pre-flights against the same checks as a demotion: open Service Agreements naming them as RCIC of record, Transfer Rooms they manage, pending countersignatures. Once those are reassigned (or there were none to begin with), the seat is removed, the per-seat charge drops on the next billing cycle, and the teammate's sign-in stops working immediately. Their historical activity (bookings they handled, agreements they drafted, audit trail entries they generated) stays in the ledgers for legal defensibility; the team-roster simply no longer lists them.

> **Important**: Seat removal is immediate. Before clicking Remove, make sure the teammate has finished any active work, has received a password reset link (if they need to recover their personal data from My Profile first), and has handed off any in-flight matters. There is no undo button; you would re-invite from scratch.

Billing implications

Adding or removing a seat changes your Premium subscription's per-seat total. Stripe pro-rates the change to the day, so adding a seat mid-cycle charges only the remaining days at the new rate, and removing a seat mid-cycle credits the unused days back against your next invoice. The Billing card in Settings always shows your current seat count alongside the next renewal date. The Owner's seat is included in the base Premium price and is not separately charged; only additional seats (Assistants and RCICs beyond the Owner) carry per-seat charges.