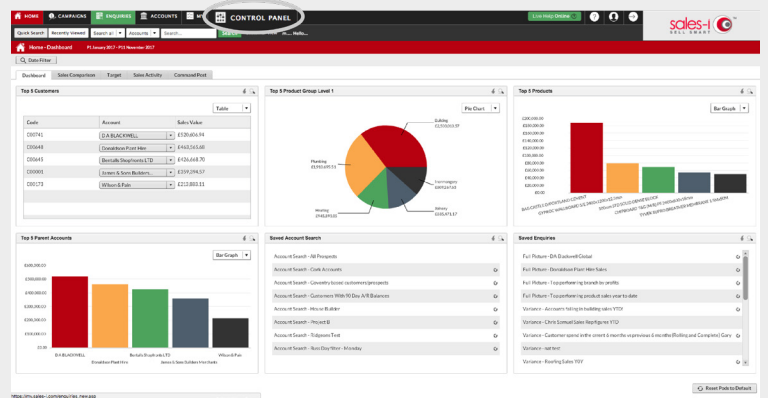


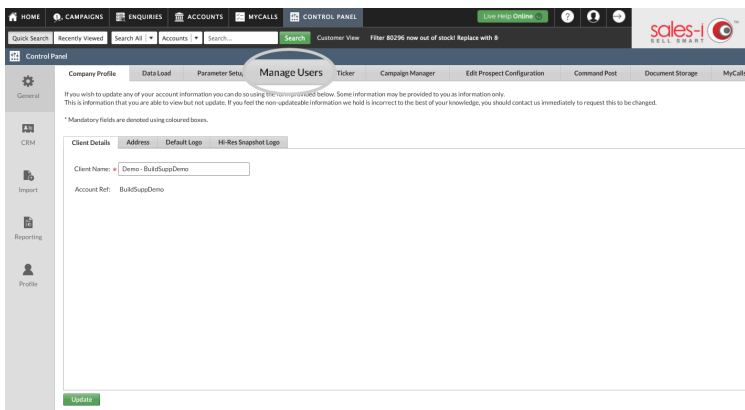
HOW TO ADD A NEW USER

This guide will show you how to add and set up a new sales-i user.

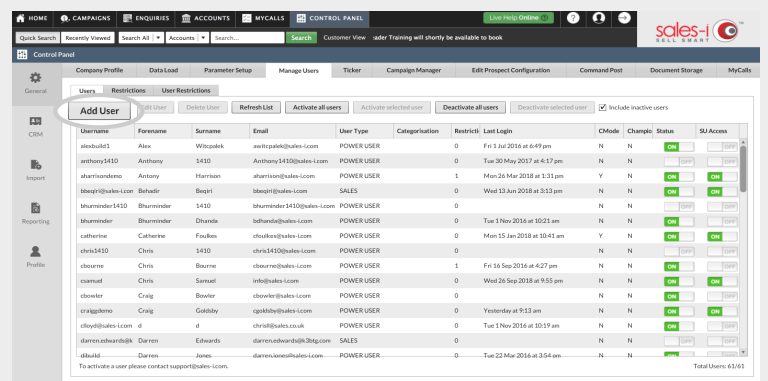
01 From the black navigation bar at the top of the screen, click **Control Panel**.



02 Click **Manage Users**. It's the fourth tab from the left.



03 Click **Add User** on the left of the screen.



04 A box should now appear with the following tabs:

a) User

Fill in all of the mandatory fields.

Please Note: The user name must be completely unique and easy to remember. We recommend using an email address.

All of the below rules need to apply when creating a password / passphrase:

- * must be 10 characters or longer (up to 255 characters).
- * must have at least one of the following characters: !@%*^&*~.-#@!/?~\.
- * must have upper case, lower case, symbols, and numbers; or at least three of those four groups.
- * should not be a common word and should not be a common phrase.
- * should not contain a date, a name, or other things that can be associated with you.

Status:

- * red: Very Weak.
- * orange: Weak.
- * yellow: OK.
- * green: Good.

b) Login

Use this tab if password **Reset** is required in the future.

c) Functions

This tab will be greyed out for now. As soon as you've saved and created the new user however, this tab will become available. This will allow you to add/remove the following options to someone's account: Print, Export, Target, CRM, Snapshot, Campaign Manager, Upload Documents, Email Multiple Users, Autopilot.

The screenshot shows the 'Add User' window with the 'Login' tab selected. It features a 'Password' input field and a 'Reset' button. At the bottom, there are 'Add', 'Cancel', and 'Send Confirmation Email' options.

d) Restrictions

Adding a user to a restriction will restrict their view to those accounts only. Simply click the + button in the bottom left-hand corner of the window, choose the restriction/s you wish to place against the user, then select **Add Restriction** when you're done. Return to this tab whenever you want to see which restrictions a user has against them or to add/remove them from restrictions.

Want to learn how to create group restrictions? Visit <https://support.sales-i.com/control-panel/how-to-guides/how-to-create-group-restrictions-power-users-only>.

The screenshot shows the 'Add User' window with the 'Restrictions' tab selected. It displays a table with columns for 'Restriction Description' and 'Restriction Type'. Below the table are '+', '-' buttons and a 'Show All' checkbox. At the bottom, there are 'Add', 'Cancel', and 'Send Confirmation Email' options.

e) Security

Options relating to CRM access: Select as required and click **Add** to apply.

Although you may restrict a user to see specific sales information you may wish to allow them to see Record Card information for other accounts.

The screenshot shows the 'Add User' window with the 'Security' tab selected. It contains three checkboxes for security settings: 'Allow user to search all customers to find out who the sales person is.', 'Allow user to search and see the CRM information for any customer.', and 'Allow user to view MyCalls for other sales people.' At the bottom, there are 'Add', 'Cancel', and 'Send Confirmation Email' options.

The screenshot shows the 'Add User' window with the 'Dial Preferences' tab selected. It includes a section for 'Dial Integration' with instructions and examples of URLs. Below are input fields for 'VoIP' and 'Skype'. At the bottom, there are 'Add', 'Cancel', and 'Send Confirmation Email' options.

f) Dial Preferences

For VOIP users only. Use as required to set up dialing preferences.

g) Other

Select options as required.

If you wish to remove GP, Profit and Cost for a user then check **Customer Mode**.

However you may want a user with Customer Mode enabled to view Customer Level Campaigns and/or Global Saved Enquiries. If so, check as appropriate.

h) Mail Preferences

Select **Email, Post, Phone and SMS preferences** as required.

i) Language Preferences

Select which language you would like the user to receive email notifications and autopilot downloads in.

When you're done, hit **Add** in the bottom left-hand corner of the screen.

Username	Name	Surname	Email	User Type	Group	Last Login	Office	Status	Activated
whogee	Neil	Swales	neil@merchandise.com	POWER USER	0	Tue 10 Mar 2015 at 5:49pm	N		Disabled
croppad	Other	Cropper	ocropper@sales.com	POWER USER	0	Fri 14 at 12:57 am	N	ON	Activated
o4c_bono	Olga	Copied	ocopied@sales.com	POWER USER	0	Tue 7 Nov 2017 at 11:38pm	N	ON	Activated
slbdciano	Paul	Black	pblack@sales.com	POWER USER	0	Sat 13 Nov 2017 at 11:05 pm	N	ON	Activated
purghitano	Paul	Wright	pwright@sales.com	POWER USER	0	Wed 17 Nov 2017 at 8:46pm	N	ON	Activated
lucymell05	L	Smith	lsmith@sales.com	POWER USER	0	Mon 14 Nov 2016 at 10:28 am	N	ON	Activated
e4shubrow	Rachel	Crain	rcrain@sales.com	POWER USER	0	Fri 20 Nov 2017 at 1:28 am	N	ON	Activated
robbey	Robbie	Horrobin	rhorrobin@sales.com	POWER USER	0	Fri 11 Aug 2017 at 11:47 am	N	ON	Activated
inger1010	Roger	1010	inger1010@sales.com	POWER USER	0		N	ON	Disabled
ccole@sales.com	Ryan	Cole	ccole@sales.com	POWER USER	0	Mon 23 Oct 2017 at 9:35 am	N	ON	Activated
SOB2017	Scott	Osborn	sosborn@sales.com	SALES	0		N	ON	Activated
stevens	Steve	Franklin	stfranklin@sales.com	SALES	0	Thu 28 Sep 2017 at 4:01 pm	N	ON	Activated
stevds	Steve	Tisdale	stisdale@sales.com	POWER USER	0		N	ON	Activated
Stevens080817	Steve	Franklin	stfranklin@sales.com	POWER USER	0		N	ON	Activated
stanwood	Stan	Wood	stanwood@sales.com	SALES	0	Wed 17 Nov 2017 at 10:27 pm	N	ON	Activated
stanwood10	Stan	Wood	stanwood@sales.com	POWER USER	0	Wed 17 Nov 2017 at 10:27 pm	N	ON	Activated
stanwood10g	Stan	Wood	stanwood@sales.com	POWER USER	0	Fri 20 Nov 2017 at 10:10 am	N	ON	Activated
stanwood10n	Stan	Wood	stanwood@sales.com	POWER USER	0	Fri 20 Nov 2017 at 10:10 am	N	ON	Activated
user123	User	Marketing	user123@sales.com	MARKETING	1	Fri 20 Nov 2016 at 12:39pm	N	ON	Activated
victor@sales.com	Victor	Luter	vluter@sales.com	SALES	0	Fri 11 May 2017 at 10:30 am	N	ON	Activated
victor17	Victor	Domendo	vdomendo@sales.com	POWER USER	0	Fri 1 Nov 2017 at 1:11 pm	N	ON	Activated
whitland@sales.com	Waine	Opton	wotpton@sales.com	SALES	0	Mon 3 Jul 2017 at 10:56 am	N	ON	Disabled

To edit a user....

Simply find and select the user in the users list and click **Edit User**. The user will need to log out and then back in again for the changes to take effect.

You should also click on **Refresh List** to ensure any recent changes have been applied.