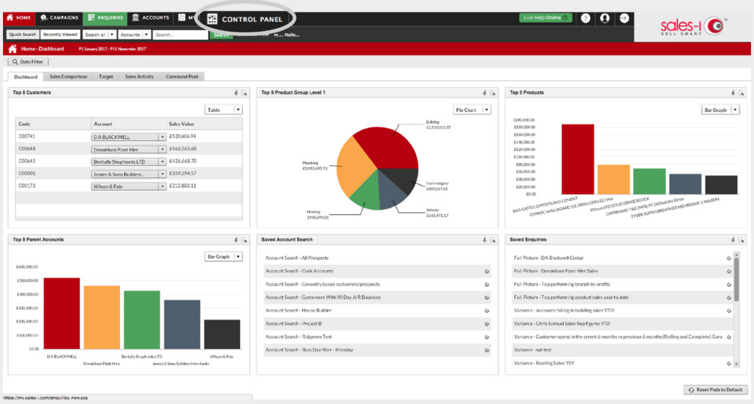
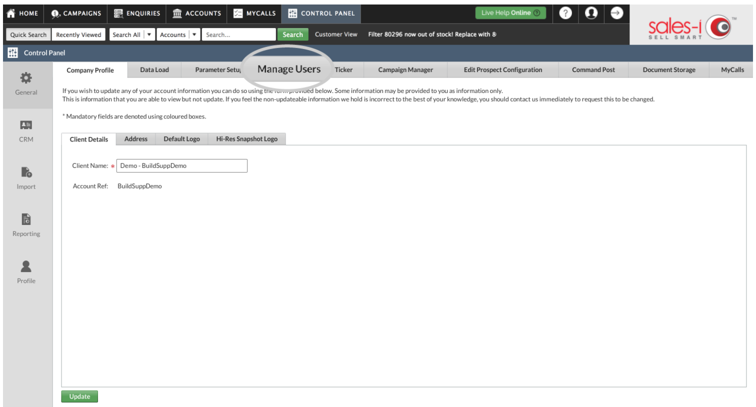
sales-i
SELL SMART

HOW TO ADD A NEW USER

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

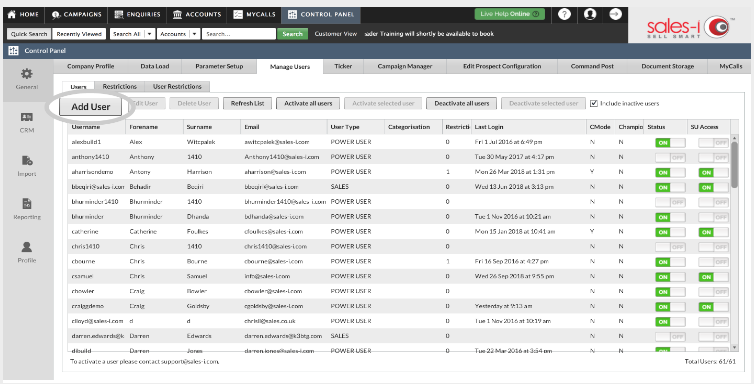
01 From the black navigation bar at the top of the screen, click **Control Panel**.

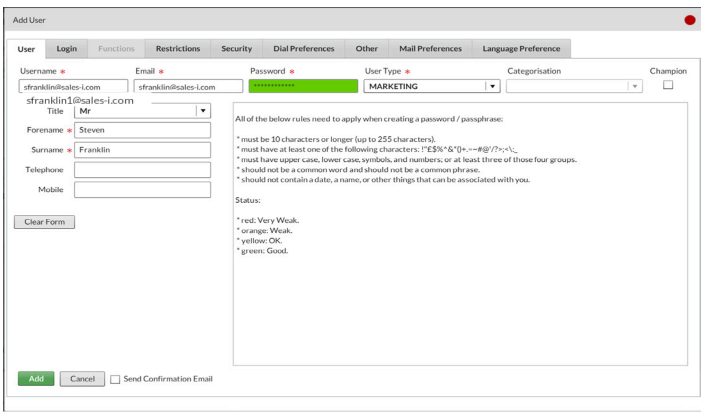




02 Click **Manage Users**. It's the fourth tab from the left.

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.

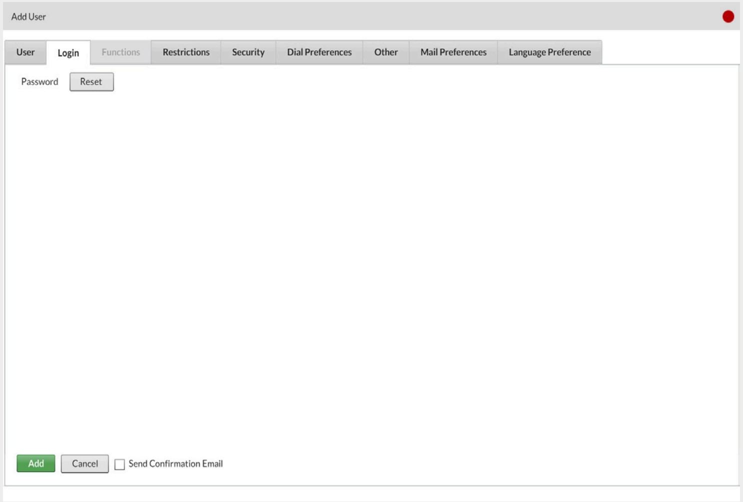
Please Note: The user name must be completely unique and easy to remember. We recommend using an email address.

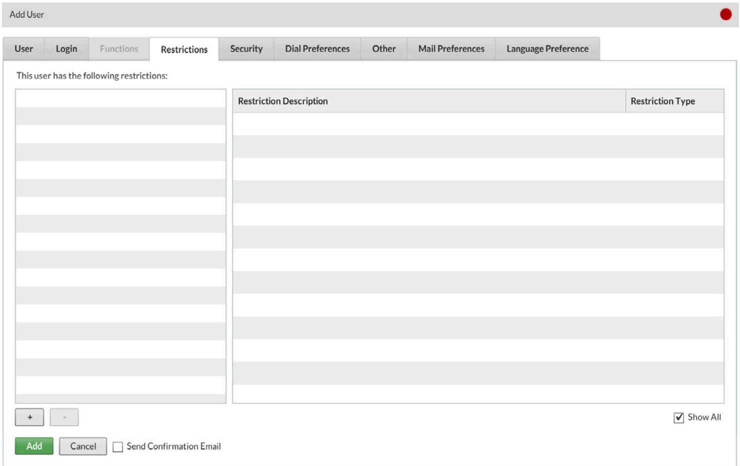
b) Login

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.





d) Restrictions

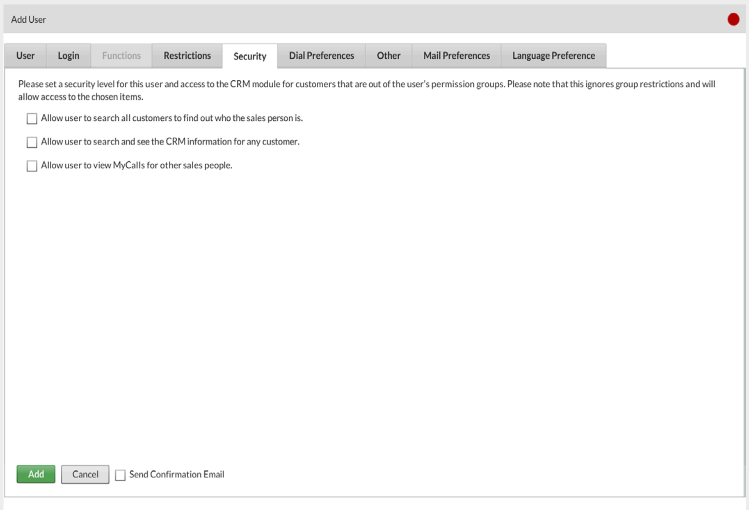
Adding a user to a restriction will restrict their view to those accounts only. Simply click the **+** button in the bottom left-hand corner of the window, choose the restriction/s you wish to place against the user, then select **Add Restriction** when you're done. Return to this tab whenever you want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

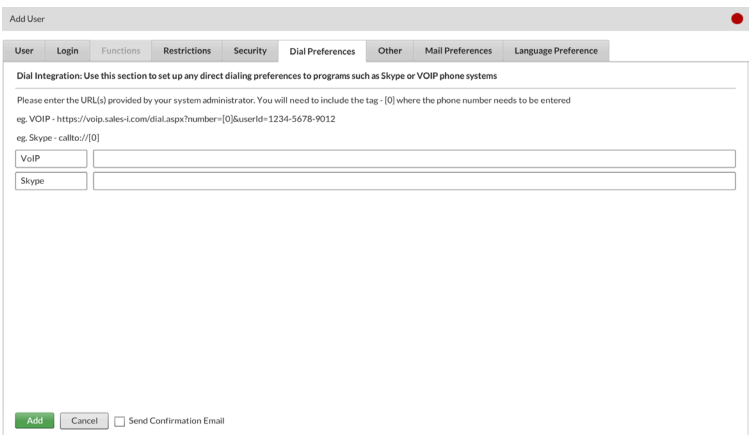
Want to learn how to create group restrictions? Visit https://support.sales-i.com/control-panel/how-to-guides/how-to-create-group-restrictions-power-users-only.

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.





f) Dial Preferences

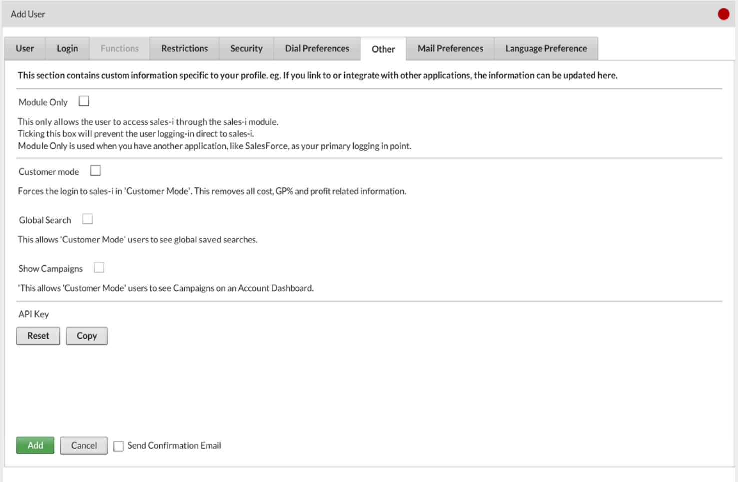
For VOIP users only. Use as required to set up dialing preferences.

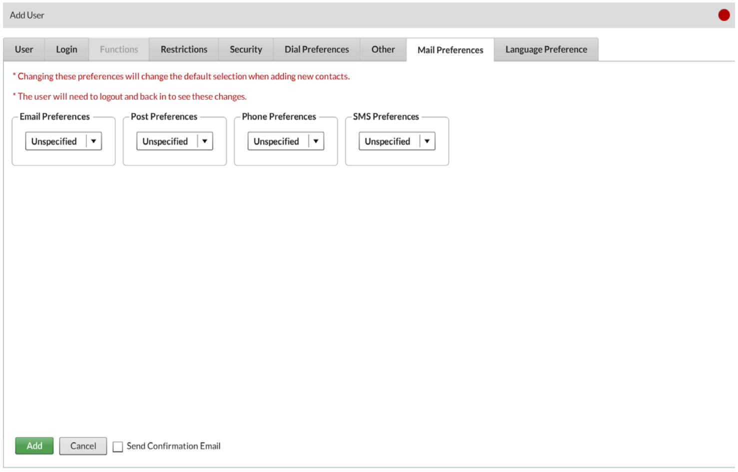
g) Other

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.





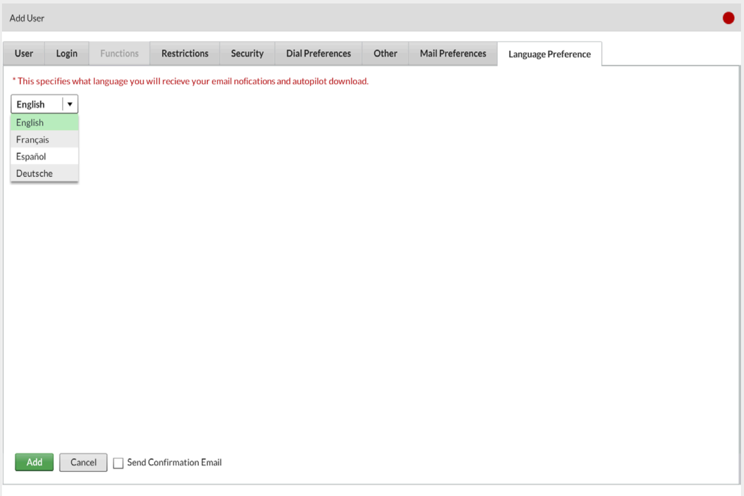
h) Mail Preferences

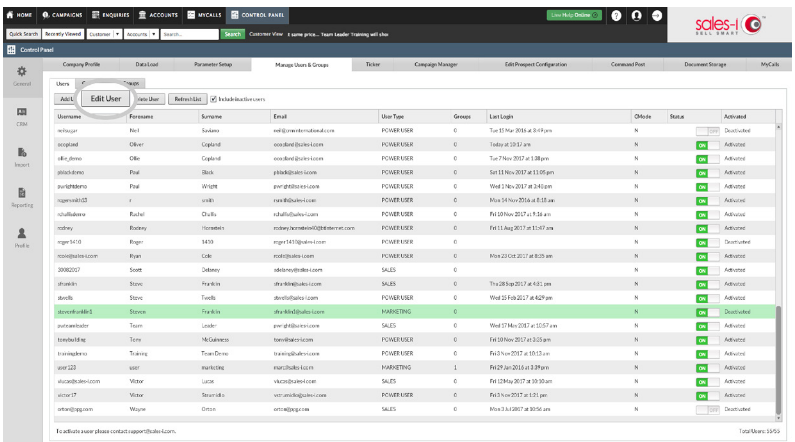
Select **Email, Post, Phone and SMS preferences** as required.

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.





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.

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