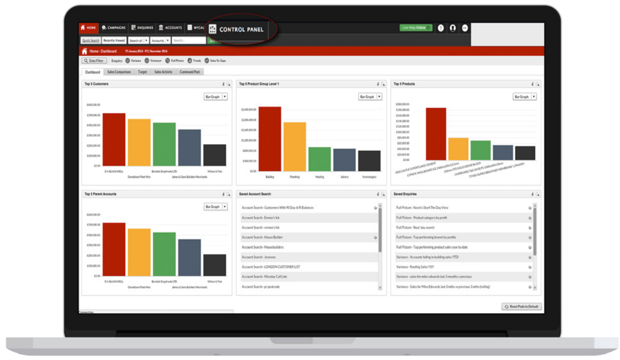
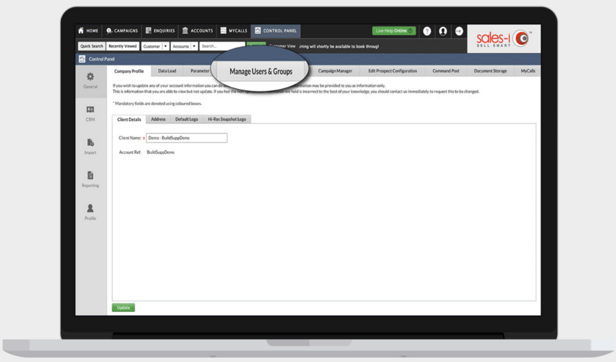
HOW TO TURN ON AUTOPILOT FOR YOUR SALES USERS

This guide is for Power Users and will show you how to turn on the Autopilot feature for your Sales Users.

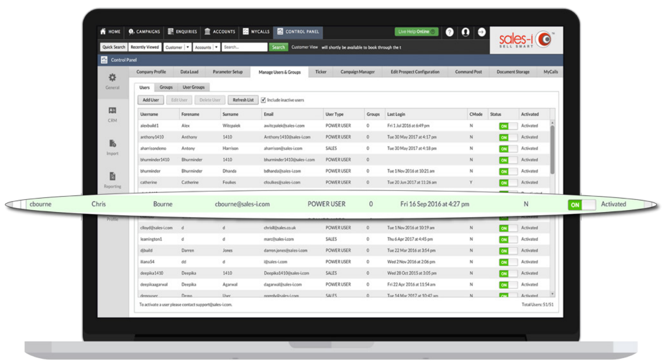
01 From the top navigation, click **Control Panel.**

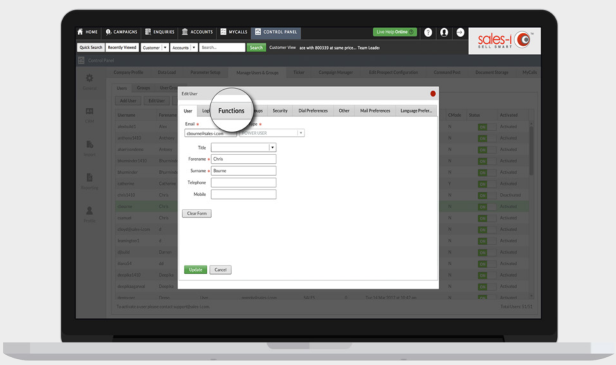




02 Click the **Manage Users and Groups** tab.

03 From the list of your users, scroll down and find the one you want to turn Autopilot on for. Once you've found them, *double-click* on them to open their settings.

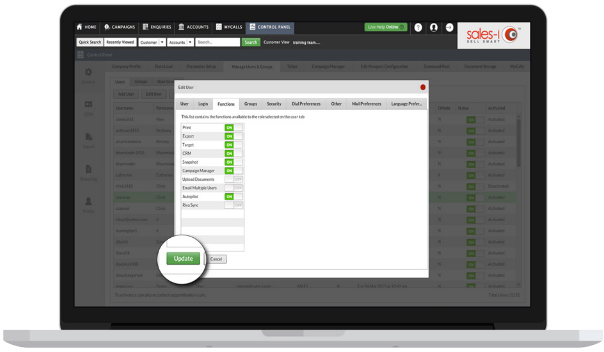


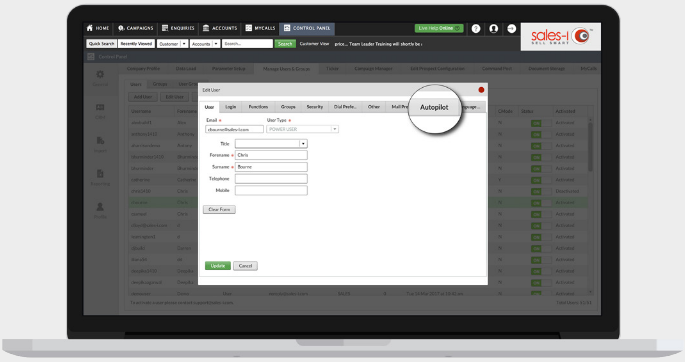


04 Click on the **Functions** tab.

05 Now, make sure that Autopilot is turned on* and, when it is, click the green **Update** button.

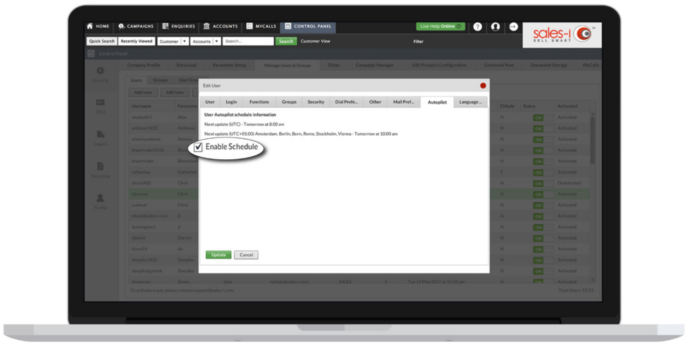
*Please note: if there's no Autopilot tab, please get in touch with the sales-i support team and someone will be happy to turn Autopilot on for your company.

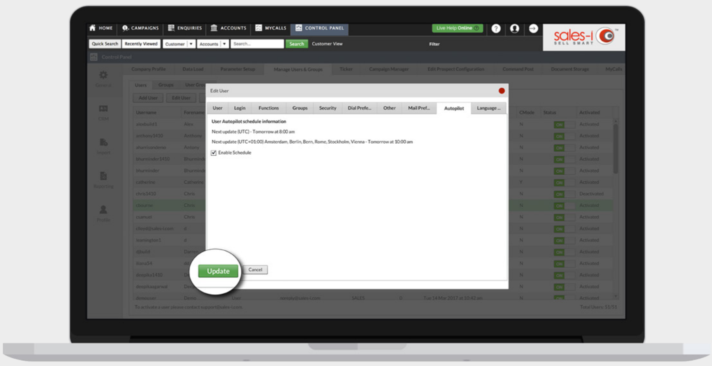




06 Now that you've updated the user's settings, Autopilot will be turned on. *Double-click* the user again and you should now have an additional tab available called **Autopilot;** click it.

07 There's only one option in this screen: **Enable Schedule**. Make sure that this button is ticked to ensure that your users will receive updates based on their call notes.





08 Finally, click the green **Update** button to complete Autopilot set up for your sales user.

AUTOPILOT HOW TO GUIDE AVAILABLE

If you haven't already, visit the support site to view or download an Autopilot guide for your handheld device: iOS or Android.

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