Adding Users

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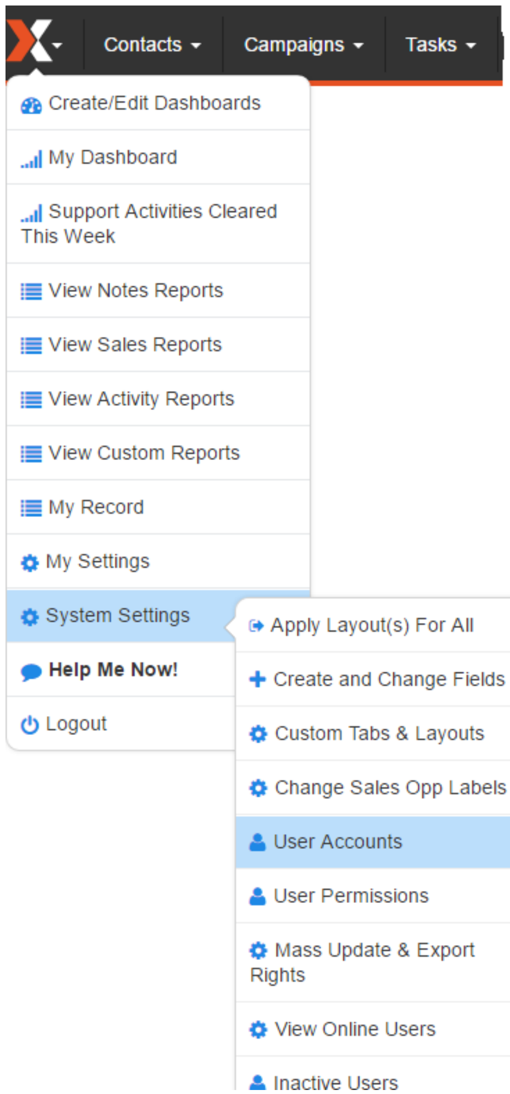
When you need to add a user to your SalesNexus database, you must be logged in with Administrative permissions and have available licenses.

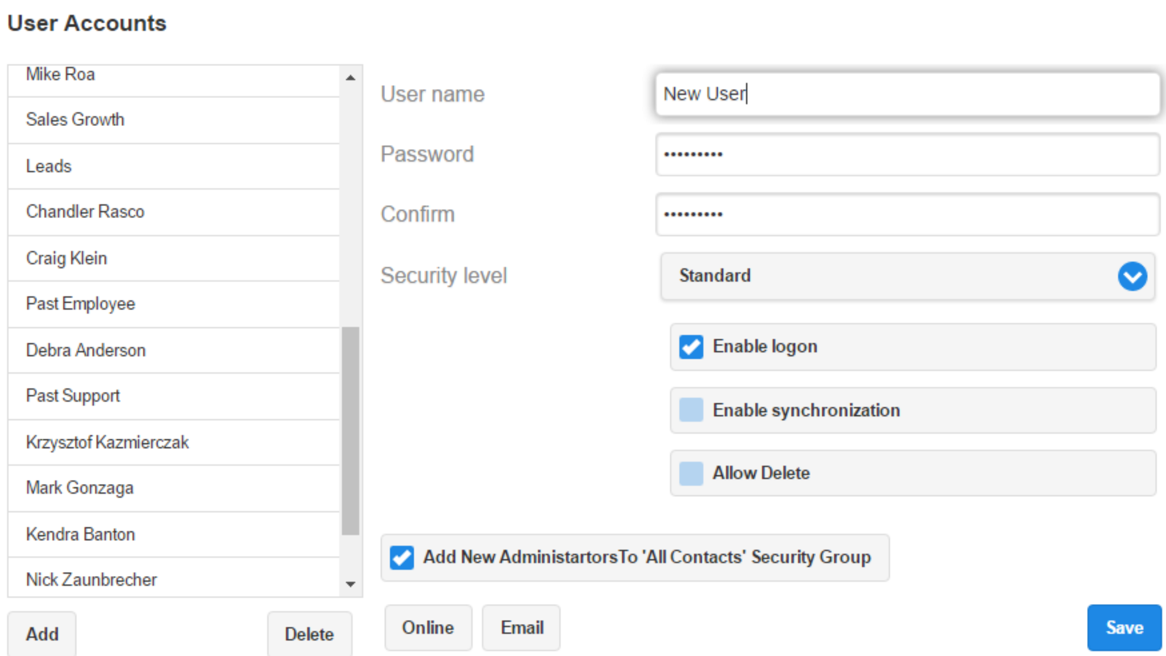
Go to System Settings, User Accounts



Click Add (at the bottom of the Users list)

Enter all details/fields for the new user

You will enter a password you create (not system generated)



Select SAVE once you have entered all details for the new user

Enable Synchronization and Allow delete can be changed later if it is not known at the time the user is added. Synchronization Setting is checked to allow the users to sync to their outside devices.

Note: If you currently do not have any open licenses for your new user, you will be directed to add them (with payment) in the shopping cart.

Note: If you select Administrator, your new user will automatically be added to the security group all contacts. Other levels must be manually added

Security Groups Settings

Go to System Settings> User Permissions

Security Groups

Groups

Group Name	Whose Contacts	Who Sees Them	#
All Contacts	Edit	Edit	Delete
Suspects	Edit	Edit	Delete
Territory A	Edit	Edit	Delete
Territory B	Edit	Edit	Delete

Add Group

Super Groups

Group Name	Which Groups	Who Sees Them	#
TrainingSuperGroup	Edit	Edit	Delete

Add Super Group

View Security Summary

You can create security groups to limit who can see what contacts. All users can see their own, but must be given permission to see others

WHOSE CONTACTS = whose contacts are part of this security group (All users should be added to All contacts under whose Contacts by clicking on Edit, unless otherwise designated by your company)

WHO SEES THEM = who has the rights to view the contacts (their contacts do not have to be in the group for a user to see the contacts)

SAVE

Synchronization Settings

Go to System Settings>Mass Updates and Export Rights

Change PDA Synchronization setting for SN Admin, Technical Support

Click on the user's name for whom you wish to set Synchronization settings
click [+][-] to check or unchecke column of checkboxes

	Export Setting	Mass Update
Employee	Allow to export?[+][-]	Allow?[+][-]
Billing		

Exporting Settings is checked when you want the user to be able to export contacts to an excel file.

Mass update is checked when you want the user to be able to do Mass updates under Edit list.

User Views

System Settings>Apply Layout(s) for all – allows all users to see any layout changes made.