Adding Users



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

Contacts -	Campaigns 🗸 Tasks 🗸		
n Create/Edit Dashboards			
I My Dashboard			
Jupport Activities Cle This Week	eared		
E View Notes Reports			
View Sales Reports			
View Activity Reports	3		
E View Custom Report	s		
My Record			
🌣 My Settings			
🔅 System Settings	Apply Layout(s) For All		
🗩 Help Me Now!	+ Create and Change Fields		
🖒 Logout	🔅 Custom Tabs & Layouts		
	🔅 Change Sales Opp Labels		
	💄 User Accounts		
	Luser Permissions		
	Mass Update & Export Rights		
	🔅 View Online Users		
	Inactive Users		

Click Add (at the bottom of the Users list)

Enter all details/fields for the new user



Mike Roa	A Licor name	New Lload
Sales Growth	User name	New User
Leads	Password	
Chandler Rasco	Confirm	
Craig Klein	Security level	Standard
Past Employee		
Debra Anderson		Enable logon
Past Support		Enable synchronization
Krzysztof Kazmierczak		
Mark Gonzaga		Allow Delete
Kendra Banton	Add New Administr	rtoraTo 'All Contacte' Socurity Croup
Nick Zaunbrecher	▼ Add New Administra	noisio Ancontacts security oroup
Add	elete Online Email	Save

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

User Accounts

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 uncheck e 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.



