

# HOW TO ADD A NEW USER

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

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







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

номе 🦻	, CAMPAIGNS	ENQUIRIES	ACCOUNTS	MYCALLS CONTRO	L PANEL			Live Help Online ()	0	2	calor	
ick Search	Recently Viewed Sear	ch Al 💌 Accou	nts 💌 Search	Search Cust		Training will shortly	be available t	o book			SCIES	
Control Pa												
a	Company Profile	Data Load	Parameter Se	tup Manage Users	Ticker 0	Campaign Manager	Edit	Prospect Configuration Co	mmand Post	0	ocument Stora	ge M
ave ieneral	Users Restrict	ions User Res	trictions									
	Add User	Edit User	Delete User	Refresh List Activate all use	rs Activates	elected user	leactivate all	isers Deactivate selected user	🗹 Inclu	de inactive	users	
CRM												
CRM	Username	Forename	Surname	Errail	User Type	Categorisation	Restricti	Last Login	CMode	Champio	Status	SU Access
	alexbuild1	Alex	Witcpalek	awitcpalek@sales-i.com	POWER USER		0	Fri 1 Jul 2016 at 6:49 pm	N	N	ON	
Ь	anthony1410	Anthony	1410	Anthony1410@sales-Lcom	POWER USER		0	Tue 30 May 2017 at 4:17 pm	N	Ν		
Import	aharrisondemo	Antony	Harrison	abarrison@sales-i.com	POWER USER		1	Mon 26 Mar 2018 at 1:31 pm	Y	Ν	ON	ON
	bbeqiri@sales-i.com	Behadir	Beqiri	bbeqiri@sales-Lcom	SALES		0	Wed 13 Jun 2018 at 3:13 pm	N	N	ON	ON
Ð	bhurminder1410	Bhurminder	1410	bhurminder 1410@sales-Lcom	POWER USER		0		N	N	OFF	01
sporting	bhurminder	Bhurminder	Dhanda	bdhanda@sales-i.com	POWER USER		0	Tue 1 Nov 2016 at 10:21 am	N	N	ON	
	catherine	Catherine	Foulton	cfoulkes@sales-Lcom	POWER USER		0	Mon 15 Jan 2018 at 10:41 am	Y	N	ON	ON
	chris1410	Chris	1410	chris1410@sales-Loom	POWER USER		0		N	N		
Profile	cbourne	Chris	Bourne	cbourne@sales-i.com	POWER USER		1	Fri 16 Sep 2016 at 4:27 pm	N	N	ON	OF
	csamuel	Chris	Samuel	info@sales-Lcom	POWER USER		0	Wed 26 Sep 2018 at 9:55 pm	N	N	ON	ON
	chowler	Craig	Bowler	cbowler@sales-i.com	POWER USER		0		N	N	ON	
	craiggdemo	Craig	Goldsby	cgoldsby@sales-i.com	POWER USER		0	Yesterday at 9:13 am	N	N	ON	ON
	clloyd@sales-i.com	d	d	chrisli@sales.co.uk	POWER USER		0	Tue 1 Nov 2016 at 10:19 am	N	N	ON	OF
	darren.edwards@k	Darren	Edwards	darren.edwards@k3btg.com	SALES		0		N	N	OFF	
	dheild	Darren	loves	darren.ionesilisales-i.com	POWER USER		0	Tue 22 Mar 2016 at 3.54 pm	N	N		



**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.

Add User									•
User	Login	Functions	Restrictions	Security	Dial Preferences	Other	Mail Preferences	Language Preference	
This us	er has the f	ollowing restrict	ions:						
				Restrictio	on Description				Restriction Type
+	-								V Show All
Add	Can	cel 🗌 🗌 Send	Confirmation Emai	1					

### 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.

User									
er	Login	Functions	Restrictions	Security	Dial Preferences	Other	Mail Preferences	Language Preference	
asswo	rd Re	eset							
Add	Can	el Send	Confirmation Emai						

### 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 <u>https://support.sales-i.com/control-panel/</u> <u>how-to-guides/how-to-create-group-restrictions-</u> <u>power-users-only</u>.

Jser	Login	Functions	Restrictions	Security	Dial Preferences	Other	Mail Preferences	Language Preference	
		y level for this u chosen items.	ser and access to t	he CRM modu	e for customers that an	e out of the u	ser's permission group	s. Please note that this ignores group re	estrictions and will
A	llow user to	search all cust	omers to find out w	ho the sales pe	rson is.				
🗌 A	llow user to	search and see	the CRM informat	ion for any cus	tomer.				
🗌 A	llow user to	view MyCalls f	or other sales peop	ole.					

Add User									•
User	Login	Functions	Restrictions	Security	Dial Preferences	Other	Mail Preferences	Language Preference	
Dial In	tegration: U	se this section t	to set up any direct	dialing prefer	ences to programs suc	h as Skype o	r VOIP phone systems		
Please	enter the UF	RL(s) provided by	your system admir	nistrator. You v	vill need to include the	tag - [0] whe	re the phone number ne	eds to be entered	
-			dial.aspx?number=	[0]&userId=12	34-5678-9012				
	pe - callto://	[0]							
VoIP									
Skype									
Add	Cano	el Send	Confirmation Emai	I					

### f) Dial Preferences

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



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.

	Login	Functions	Restrictions	Security	Dial Preferences	Other	Mail Preferences	Language Preference	
This se	ction conta	ins custom infor	rmation specific to	your profile.	eg. If you link to or inte	grate with o	ther applications, the i	nformation can be updated I	here.
Modul	Only	]							
			sales-i through th		e.				
			er logging-in direct e another applicati		orce, as your primary lo	ogging in poir	ıt.		
Custor	ner mode								
			mar Mode' This re	mover all cost	, GP% and profit related	linformation			
Forces	the login to	sales in Custo	amer mode . This re	moves an cost	, GP % and pront related	information			
Global	Search								
This all	ows 'Custor	ner Mode' users	to see global save	d searches.					
Show (	ampaigns								
'This al	lows 'Custor	mer Mode' users	to see Campaigns	on an Account	Dashboard.				
API Ke									
Rese	t Co	ру							

	-	Restrictions	Security	Dial Preferences	Other	Mail Preferences	Language Preference	h) Mail
		n to see these cl		idding new contacts.				
Email Pref	ified	ecified 🛛 🔻		ecified	SMS Preferen			Select <b>E</b> preferer

#### 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.



rol Panel									
Company Profile	DataLood	Parameter Setup	Manage Users & Groups	Ticker Campai	n Manager	Edit Prospect Configuration	Command Post	Document Storage	M
Users	******								
AAL Edit U	ser viele User Rel	reshlist 🗹 kolodeinacive	users						
Username	Forerame	Samoree	Email	User Type	Groups	Last Login	CMode	Status Activated	
reitugar	Nel	Salaro	ne#@crminternational.com	POWER USER	0	Tue 15 Mar 2015 at 8-49 pm	N	CITY Deactivated	
ocopiand	Oliver	Copland	ocopland@sales-i.com	<b>POWER USER</b>	0	Today at 10:17 am	N	Adivated	
ollic_demo	Offic	Copland	ocopland@sales-i.com	POWER USER	0	Tue 7 Nov 2017 at 1.08 pm	N	ON Adjusted	
pblackdomo	Paul	Black	pblack@sales i.com	POWER USER	0	Sat 11 Nov 2017 at 11:05 pm	N	Advited	
pvright/kmo	Paul	Wright	pwight@sales-loom	POWERUSER	0	Wed 1 Nov 2017 at 3:40 pm	N	ON Adjusted	
rugersmithd3	1	dime	ramit@sales-i.com	POWER USER	0	Mon 14 Nov 2016 at 8:18 am	N	Adviced	
ruhallisdemo	Ratel	Outs	ntallollalesi.com	POWER USER	0	Fri 10 Nov 2017 at 9:36 am	N	on Advised	
rodney	Rodney	Homstein	rociney homstein40@trlinternet.com	POWER USER	0	Fri 11 Aug 2017 at 11:47 am	N	Activated	
roger1400	Roger	1410	reper 1410@sales-i.com	POWER USER	c		N	Deartivated	
rcole@sales-Loom	Ryan	Cole	rcolo@sales-i.com	POWERUSER	0	Mon 23 Cit 2017 at 8:35 am	N	Activated	
30082017	Scott	Debney	szlebney@sales-i.com	SALES	c		N	Adivated	
sfranklin	Steve	Franklin	stranklingsaks-Loom	SALES	0	Thu 28 Sep 2017 at 4:31 pm	N	Advated	
stwells	Stove	Twells	stwells@sales i.zom	POWER USER	0	Wed 15 Feb 2017 at 4:29 pm	N	Adivated	
stevenfranklin1	Steven	Franklin	sfranklin5@sales-Loom	MARKETING	0		N	Deactivated	
pyteamloader	Team	Leider	puright@sales-l.com	SALES	0	Wed 17 May 2017 at 10:57 am	N	Activated	
tonybuilding	Tony	McGuinness	toey@salco-Lcom	POWERUSER	0	Fri 10 Nov 2017 at 3:35 pm	N	Adivated	
trainingkeno	Training	TeamDemo	training@sales-i.com	POWER USER	0	Fri 3 Nov 2017 at 10:13 am	N	Advated	
user123	usier	marketing	marc@sales-l.com	MARKETING	1	Fri 29 Jan 2016 at 3 39 pm	N	ON Activited	
vixas@sales-Lcom	Victor	Lucas	vlucasijsales-Loom	SALES	0	Fri 12May 2017 at 10:30 am	N	ON Activated	
victor17	Viter	Smirridia	vetrumidiograies-Learn	POWERUSER	0	Fri 3 New 2017 at 1:21 per	N	Advance	

# 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.

https://login.sales-i.com