

HOW TO RESTRICT A USER'S DATA ACCESS

This guide will show you how to create a group for your users so you can specify what data they can and can't see. This helps to focus your team members on the accounts, fields and areas specific to them, and means they only see the data that's key to their job role.

O1 From the black navigation bar at the top of the screen, click Control Panel.







02 Now, click on Manage Users & Groups. It's the fourth tab from the left.

03 Click the **Groups** sub-tab at the top left of the screen.

Control P.	anel					
C everal	Company Profile Data Load Parameter Se User Groups her Groups Create Group Edit Group Delete Group	Nanage Users & Groups Refresh List	Ticker Campoign Ma	sager Edit Prospect Configuration	Command Post	Document Storage
CIM	Group Name Judhesenandriction	Restriction Descriptio				Restiction Type
II6	bela's restriction Chris Samuel					
B	colin jackson CRM only					
Reporting	CRM Only TEST-RC					
R Profile	CS binningham CS Branch-Belfast					
	Demo Test2280					
	Deno user Gavi					
	group name here group name here					
	group name here					





05 The Group Builder Box will now appear. Enter the name of your group and click on the required analysis type.

Test Group Customer Analysis Sales History Analysis Product Analysis			
Customer Analysis Sales History Analysis Product Analysis	Test Group		
Sales History Analysis Product Analysis	Customer Analysis		
Product Analysis	Sales History Analysis		
	Product Analysis		

Group Builder	
Test Group]
Customer Analysis	Branch
Sales History Analysis	Buying Group
Product Analysis	Sales Rep
	Sales Territory
Save Cancel	



06 Now, select a field from the central menu, depending on what you want the group's focus to be.

07 Now use the drop down menus titled Not Set to choose which areas members can and cannot see, selecting the **Include** option if you want them to see it. When you're finished, click Save,

Fest Group			
Customer Analysis	Branch	Belfast (07)	Not Set
ales History Analysis	Buying Group	Birmingham (03)	Not Set
Product Analysis	Sales Rep	Bristol (04)	Not Set
	Sales Territory	Cardiff (05)	Not Set
		Glasgow (06)	Include Not Set
		London (01)	Not Set
		Manchester (02)	Not Set
		Unassigned (ZZZ)	Not Set





O8 Click on **Refresh List** to ensure any recent changes have been applied.