



**Candid  
Color  
Systems®**

**C•ORE**

## **ACCOUNT USER SETUP**

Setting up your Account Users

# CONTENTS

User Setup.....	2
-----------------	---

**CORE is Candid Color Systems most extensive and powerful software tool to manage and market event images. CORE allows you to identify images to individual names and/or groups and market to your customer using personalized emails and/or sms text messages.**

## **User Setup**

Before you get started you'll want to setup your staff as users in CORE. Each user will need their own login/password. You will be able to give users different access within CORE so they are restricted to

specific pages based on that access. Tasks within CORE are tracked by user, so you'll want to make sure each user is logged in as themselves for the tracking to be accurate. Since CORE is a web based program, users will be able to access it from anywhere they have an internet connection.

1. Click on Settings in the top menu.
2. Click on Settings in the left menu.
3. Click on User Setup
  - a. Under User Manager at the top of the page click Add User
  - b. Enter a user name, password, First Name, Last Name and email for this user.
    - i. You may optionally enter a comment about this user. Typically the comment field is used to describe the user's role, such as, Office Manager, Temp, etc.
  - c. Under Access check all access you'd like this user to have
    - i. **Administrator** = has access to every page and all data in CORE
    - ii. **Users and Settings** = has access to the settings Menu and can add/enable/disable users
    - iii. **Sales** = has access to the Dashboard, Sales stats on the Events page and Reports page
    - iv. **Customer Service** = has access to the Events, Orders, Offers, Emails, Queues and Email Reports Pages (Likely everyone working for you will need to have Customer Service enabled)
    - v. **Spotter** = Allows user to ID images in the Race Market
    - vi. **Order Entry** = has access to Events Page and can enter Orders
  - d. You can edit access at any time or mark a user inactive
    - i. Note: It's important to mark user inactive when they no longer work for you since they will have access to your CORE account if left active.

The screenshot displays the CORE User Manager interface. The top navigation bar includes 'Dashboard', 'Events', 'Orders', 'Offers', 'Emails/Proofs', 'Queues', 'Reports', 'Settings', and 'Admin'. The left sidebar menu is expanded to 'User Setup', which includes options like 'Custom Fields', 'Payments', 'Seasons', 'Manage View Names', 'QEMS Settings', 'Event Defaults', 'Client Portal', 'Workflows', 'Organizations', 'Tax & Shipping', 'Web Site', and 'CORE Print'. The main content area is titled 'User Manager' and features tabs for 'Active Users', 'Inactive Users', and 'Add User'. Below the tabs, a note states: 'Users can be given access to one or more of the following categories: Administrator, Customer Service, Order Entry and Spotter. Photographer is not currently used though it may be used in the future.' The form contains input fields for 'Username', 'Password' (with a note 'Must be at least six characters.' and a 'Confirm Password' field), 'First Name', 'Last Name', 'Email', and 'Comment'. An 'Access' section includes checkboxes for 'Administrator', 'Users and Settings', 'Sales', 'Customer Service', 'Spotter', 'Order Entry', and 'Client Portal: Gives this user access to manage all client portal events'. An 'Add User' button is located at the bottom of the form.