Users

Last Modified on 09/21/2018 11:14 am EDT

Add any employees who will be using the Sales Automation tool as Users. Navigater to the user setup menu, select "Add User", and complete the required information. Below you will find descriptions of some of the fields in the user setup menu.

- *Products*: Select the product(s) you want this user to have access to.
- *User Role*: Determine the user's access permissions within the Sales Automation tool. When you choose a user role other than Administrator, you also have the option of further specifying the user security permissions in the tab below.

User Role	Permissions
Administrator	Create, edit, view, and delete anything within the Sales Automation
Manager	Create, edit, view, and delete within their own department(s)
User	
Technician	Create and view own calendar. Create, edit, and view own work orders.
Salesperson	Create, edit, or view own leads, proposals, and calendar appointments. Cannot delete.
Custom	Choosing "Custom" allows you to specify the user permissions in the tool. Sales Automation comes with predefined custom permissions to choose from.

- Services: Authenticate user to be able to use any features linked to the Sales Automation tool.