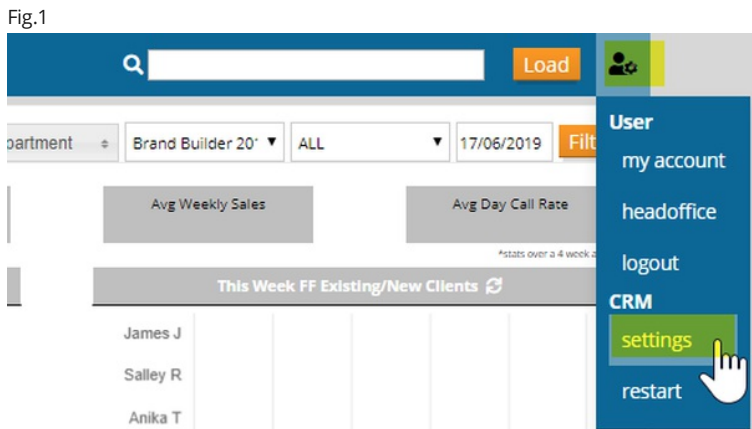


Adding New Users and Setting Home Panels

N.B. Click any image to expand:

User Access level: Admins with Super User level access.

At the top of the page, click the icon on the right hand side of the search bar, under CRM click '**Settings**' Fig.1.



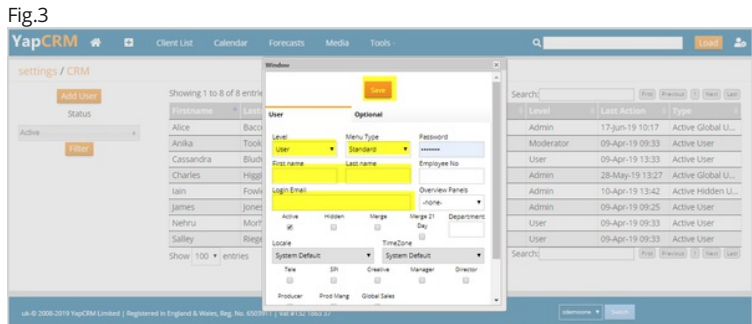
Click '**Manage Users**'. This displays all current users.

Add a user by clicking '**Add User**' Fig.2, (To see if they already have an inactive account, under Status, click the check box on the drop list to include any Inactive users, and left click '**Filter**').



This opens a pop out window: Fig.3.

- '**Level**' of access determines what actions the user can take in the CRM - select as required.
 - User - basic levels of access
 - Moderator - mid-range levels of access
 - Admin has full levels of access.
- '**Menu Type**' sets the menu ribbon for the user. This is a customisable and can be amended as necessary by a CRM Admin.
- '**Password**' leave this blank as it will auto generate a default password as '**password**'; this will remain valid for a 24hr period. When the user logs in for the first time they will be re-directed to a page to set their own password. After 24hrs, the user will need to re-set the password by using the Forgotten password link on the login page.
- Complete the Firstname, Lastname and email address, plus any applicable fields, and left click '**Save**'.
- The '**Optional Settings**' tab is used where a client has arranged for access for the YapCRM server to send e-mails as though it is your own email client server.



Home page panels are the panels that are seen when a user logs in.

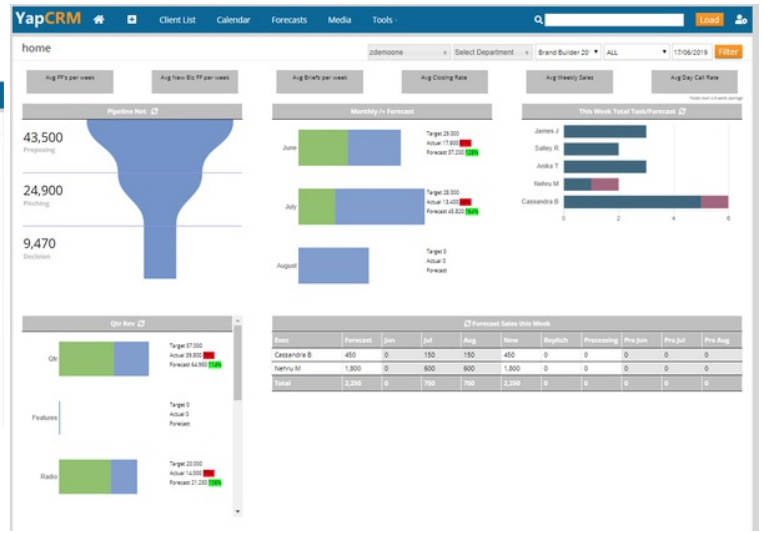
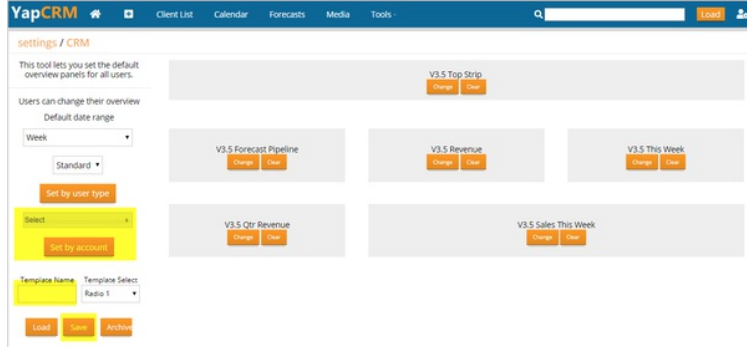
Click the icon to the right of the search bar, click '**Settings**', click '**Global Overview**'. This shows the last used home page layout shown Fig.4.

Set each home panel as desired. To save this as a template, complete the Template Name field and click Save.

Templates and layouts can be applied to user types or specific accounts. You can use '**Set by Account**' to update new users with the correct layout by selecting the relevant individual/s and clicking '**Set by Account**'. On logging in to the CRM, the new user should see home panels as follows, though the exact panels may vary from this depending upon which panels have been selected Fig.5.

Fig.5

Fig.4



If they see the following screen Fig.6, it means home panels have not yet been set, and the above step will need processing by an account Administrator.

Fig.6



If a non Admin/Super User attempts to set their home panels using the this link, they will see the following screen Fig.7, and will need to contact an Admin to set their home panels.

Fig.7

