

OLIVIA CLARE PRESENTS

CRM Education Help Sheets

Creating New Users

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CRM Education produce help sheets, best practice documentation and bespoke courseware specifically for our clients. We try to ensure our CRM Users always enjoy a straight forward and easy CRM experience.

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Creating New Users

Background

Time after time we go on site and see lists of users that have not been created correctly in a database. There is certain information contained in a User record card that must be present to ensure that database functionality works correctly. This following document should help you to understand the process and create your new users not only effortlessly - but correctly too.

Create A Record Card First

The easiest way to create a new user is to clone on an existing user in the database. The reason for this is two-fold, firstly it ensures consistency and secondly it saves time on re-entering data. To create your new user, find an existing user in the database, to do this select **Lookup > Advanced > Users** from the main menu line.



This will give you a list of all Users in the database. Double click one user who has complete record details. By this we mean a full address, phone number and web site. Once the user is active on screen, select duplicate contact this can be completed by using **Contact > Duplicate Contact** from the main menu line, or alternatively use the duplicate contact icon:



Duplicate Contact

Next fill in any information relevant to your new user it is important that you get the following information both entered and correct:

Field	Reason
Company	Needed for Duplicate Check Criteria to work correctly
Contact	Needed for Duplicate Check Criteria to work correctly
Phone	Needed for format of phone number in any contacts you create or import
Address	Needed for directions link in the Web Info Tab
Email	Used in Outlook integration

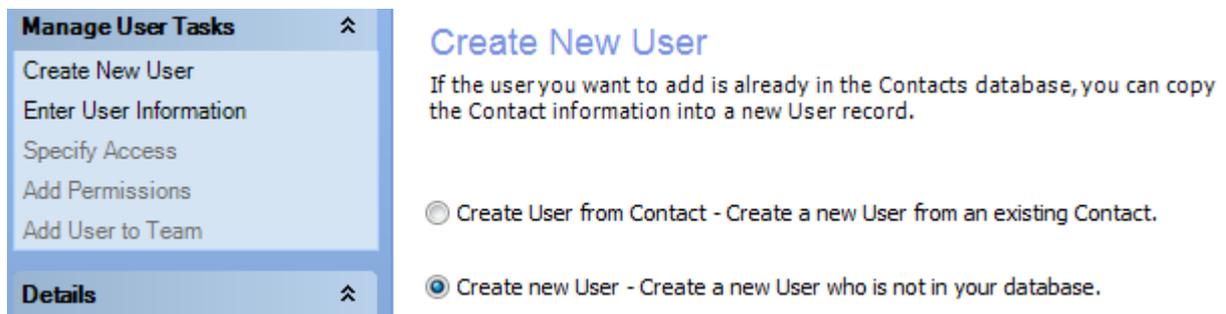
Make sure that you enter as much information into the contact screen as you can, this will ensure you have no problems later and all system functionality will work correctly.

Creating A New User

From the main menu line select **Tools > Manage Users** this will activate a dialogue box giving you a list of your existing users. Check that the user you are creating is not in the list first then select Create New User from the right hand menu list. The following two options are now available:

- **Create User from Contact**
- **Create New User**

Note that ACT! defaults to give you the option to create a brand new user. At this point it is important that you choose the Create User from Contact option before you proceed by selecting Next:



In the following screen start to type the name of the new user (Surname first) in the Lookup box:



You now have the option to either select Next or move to the next dialogue screen by double clicking on the contacts name this will take you directly to the next screen:

Enter User Information

Contact Name:

User Name:

Security Role:

Password options

New Password:

Confirm Password:

User must change password at next log on.
 User cannot change password.
 Password never expires

Contact Name and User Name: Make sure that these two pieces of information match. We always use the convention of First name and Surname with a space. This creates consistency and if any user forgets their log in name you will immediately and confidently know what it is yourself.

Security Role: Choose the relevant security role for your user but never give them a higher role just because you do not understand the functionality that is available to them through different methods of access. The Security Roles available are as follows:

Browse Level

This role is the most limited. Browse users can:

- View data that they have record access to.
- Print and run reports.
- Perform lookups and Advanced queries.
- Use Internet Services.
- Run ACT! update (cannot update schema).
- Print contact, company, and group information, calendars, address books, and so on.
- Scan for duplicate contacts.
- Set user preferences.
- Customize navigation bar.
- Back up and restore personal supplemental files.
- Browse users cannot delete records.

Restricted

This role allows users to access only certain areas of the application. Restricted users can:

- Do everything Browse users can do.
- Create contacts and opportunities, and schedule activities, including activities in an activity series.

- Run reports and perform mail merges.
- Can own a record as the Record Manager.
- Restricted users cannot delete records.

Standard

This is the most common user role, which gives users access to most records and data. This is the default user role. Standard users can:

- Access most areas of the application.
- Create contacts, groups, companies, and opportunities.
- Modify report and word-processing templates.
- Delete records they own as the Record Manager.
- Print contact, company, and group information, calendars, address books, and so on.
- Be granted permission to delete records they own.
- Be granted permission to export to Excel.
- Be granted permission to perform administrative tasks on a remote database that they are a member of.
- Be granted permission to perform Accounting link tasks.
- Be granted permission to synchronize handheld devices with the database.

Manager

This role is designed for users who require system-wide access to data but do not need to use administrative tools. Manager users can:

- Do everything Standard users can do except for being granted permission to export to excel and delete records they own.
- These permissions are granted by default and cannot be removed.
- Access all areas of the application except database maintenance.
- Define fields and layouts.
- Manage synchronization setup.
- Customize data such as priority types and custom activities for the entire database.
- Delete any records (except private records that belong to other users).
- Change user access of records (except for private items).
- Create and manage teams

This role is typically assigned to users who manage other users and who require system-wide data access.

Administrator

When you create a database, you are automatically assigned the role of Administrator. This is the most powerful role with access to all areas of the application and all data in the supplemental files . An Administrator also has access to all management tools such as database maintenance and synchronization. Administrator users can:

- Do everything Manager user's can do.
- Access all data in the database. Generally, users cannot view the private records of other users.
- Perform database maintenance, restore or delete databases.
- Create and manage users.

Once an ACT! installation is complete, the Administrator user is typically the person who manages the database. It is recommended that you limit the number of users to whom you assign

Administrator and Manager roles. Our benchmark is: If a User has not had Administrator training they should under no circumstances be given this high role.

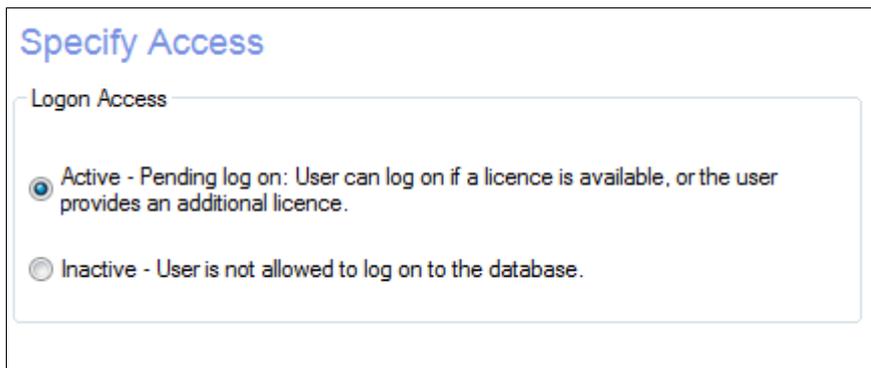
Note: Always make sure there is more than one Administrator log in for the system in case one gets corrupt or you forget the password.

Setting Password Conventions

The final area of this screen allows you to set the Password Convention for your User, set a secure password, especially in the case of Administrators or Managers. If you are going to allow your Users to change their password it is a good idea if someone holds a list of the passwords centrally.

Specifying User Access

For a User to be able to log in to the database they must be set as Active at this screen. Inactive as an option is discussed later in this document:



The screenshot shows a dialog box titled "Specify Access". Inside, there is a section labeled "Logon Access" with two radio button options:

- Active - Pending log on: User can log on if a licence is available, or the user provides an additional licence.
- Inactive - User is not allowed to log on to the database.

Add Permissions

For lower level users you have the ability to decide whether you let them do things such as Export data or delete contacts. Administrators and Managers will have this functionality as part of their role, however if you are looking at a Standard user (the most common used) then you can set privileges a little more. The right hand list gives a description of what they cannot access; the left hand list gives the functionality they have. To either add or take away any functionality simply highlight it and double click to move it to the opposite pane:

Add Permissions

Each type of security role allows the user to perform different sets of actions (permissions) in ACT!. User roles may be extended by adding optional permissions. See Help for more information on permissions.

Available Permissions (optional):

Remote Administration Accounting Link Tasks Handheld Device Sync

Added Permissions:

Delete records Export to Excel Manage Sync Subscription List



Click Next to access the following screen:

Add User to Team

Team Name	Team Description	Number of Members

Add

Remove

You have the ability to Add your user to a Team. Teams control which data a User can see. We have done a full help sheet on working with Teams which is available on our web site.

When you have finished entering your User, select Finish and that User is a New User within the database. Ensure that you log in as the user you have created and check that their permissions and views are all correct.

Deleting Users/Inactivating Users

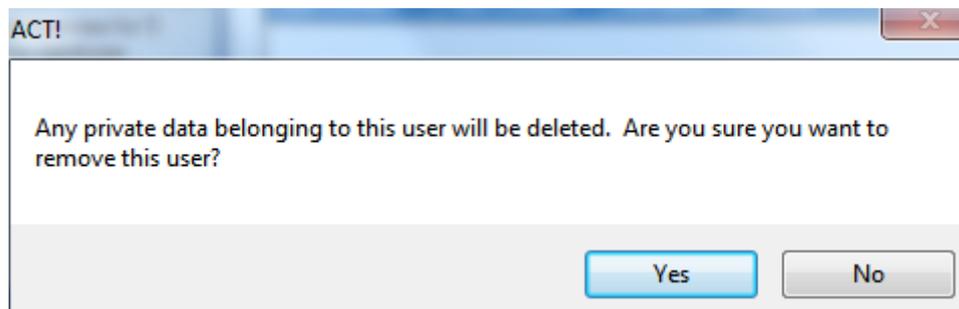
Inactivate

We will always strongly recommend that you do not delete user record cards from the database. Once a user is deleted, you will lose the full audit trail of what that user has ever done in the database. For this reason we will always advise you to Inactivate a user once they have left.

Inactivating A User will free up a license in the database, so it is important that you do use this function if you have New Users to add to the system.

Delete

If you do at any point decide to delete a user, as soon as you chose the delete option from the Tools > Manage Users dialogue box, you will get the list of existing users. Highlight the user that you are about to delete. Select delete user and the following dialogue box will activate:



The system will then ask you to reassign all records belonging to this user to someone else. Choose the user you wish to own the record cards, but remember that any Notes, History, Activity and Opportunities will also transfer and have ownership by your new user.

Note: We highly recommend that you do not delete a User but Inactivate it instead.