How to add an user to your CRM

STEP 1

<u>Go to https://crm.partneringupva.com/</u>

STEP 2

Click on Settings



Click on My Staff



STEP 4

Click on Add Employee

	G 🗘 😗 CS
, Q Search by name, email or phone	+ Add Employee
	Previous Next
Phone	
	Edit 🗸

Click on User Info

Staff Team Manageme	Team Management X
am	> User Info
Name	> User Permissions Phone
	> User Roles
	> Call & Voicemail Settings
	> User Availability 💿
	> User Calendar Configuration @

STEP 6

You need to add a first name, last name, email and a temporary password.

First Name		Last Name	
First Name	^	Last Name	•
Email			
Email			•
Phone			Extension
Phone		^	Extension
Password			
Password			Reset Password
Email Signature			
Enable signature on all ou	itgoing message	es	
Include this signature before	ore quoted text	in replies	
Verdana 👻 11nt	 Para 	aaraph - T.	* *

Click on User Permissions

Name	0 WORDS POWERED BY TINY _d
	User Permissions User Roles
	> Call & Voicemail Settings
	> User Availability 🔞

STEP 8

Select what you want the user to have access

նթ	he Oleffer and the	Campaigns	Read Only	Bulk requests			6 0 8 0
		Triggers		Funnels			
Q, Search ctrl K 4	Team	Opportunities		Conversations		arch by name, email or phone	
← Go Back		Contacts		Reviews			
Settinas		Online listings		Membership			
	Name	Settings		Only assigned	×	Phone	
Business Profile				data			
My Staff		Tags		Lead value			
Pipelines		Marketing		Websites			
BUSINESS SERVICES		Adwords		Facebook Ads			
Calendars		Reporting		Reporting			
Phone Numbers WhatsApp		Call Reporting		Attribution Reporting			
Reputation Management		Social Planner					
OTHER SETTINGS		Workflows		Blogging			
Custom Fields			Read Only				
Custom Values		Payments					
Manage Scoring							
Domains		Invoicing	\bigcirc	Record Payment			
Media		Payment Refund		Cancel			
URL Redirects				Sanacultulou			
Integrations		Affiliate Manager	×				

Click on Save

