

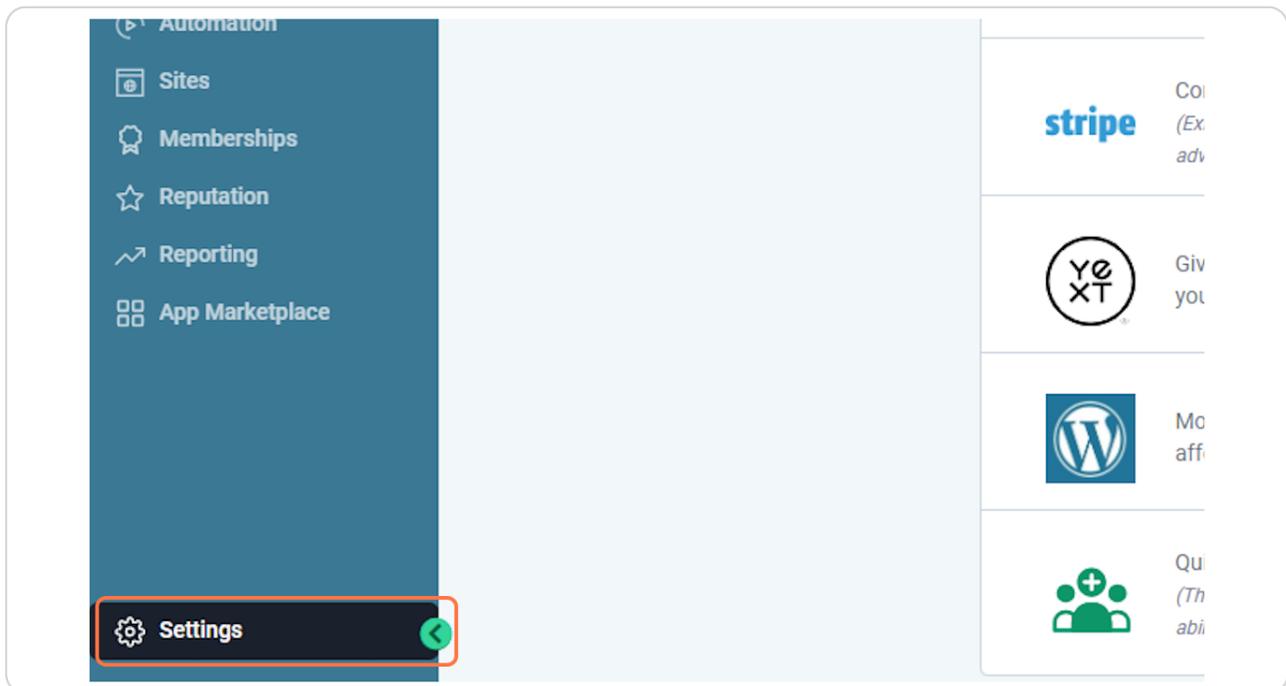
How to add an user to your CRM

STEP 1

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

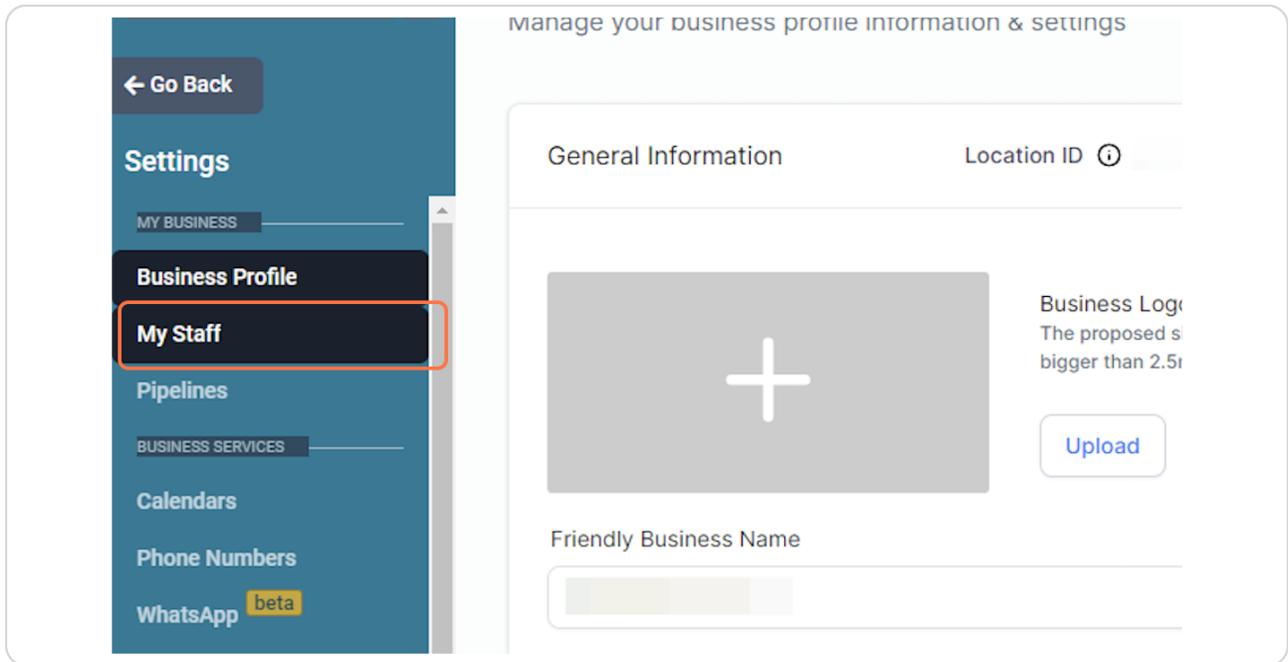
STEP 2

Click on Settings



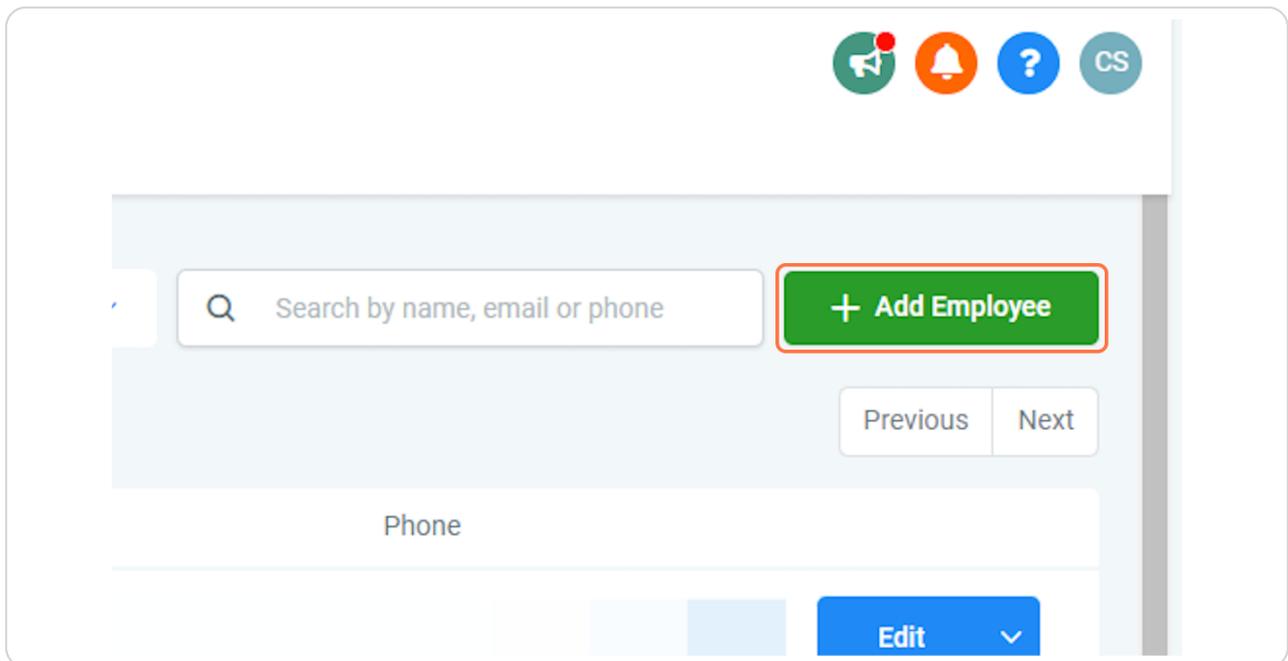
STEP 3

Click on My Staff



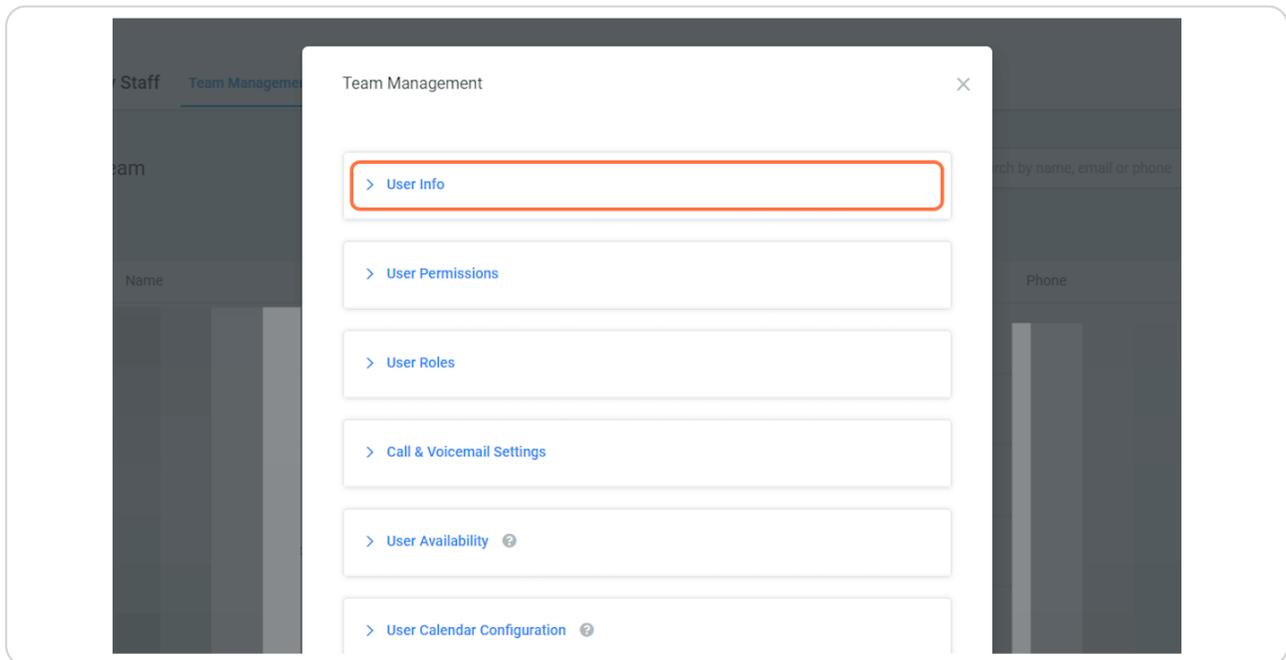
STEP 4

Click on Add Employee



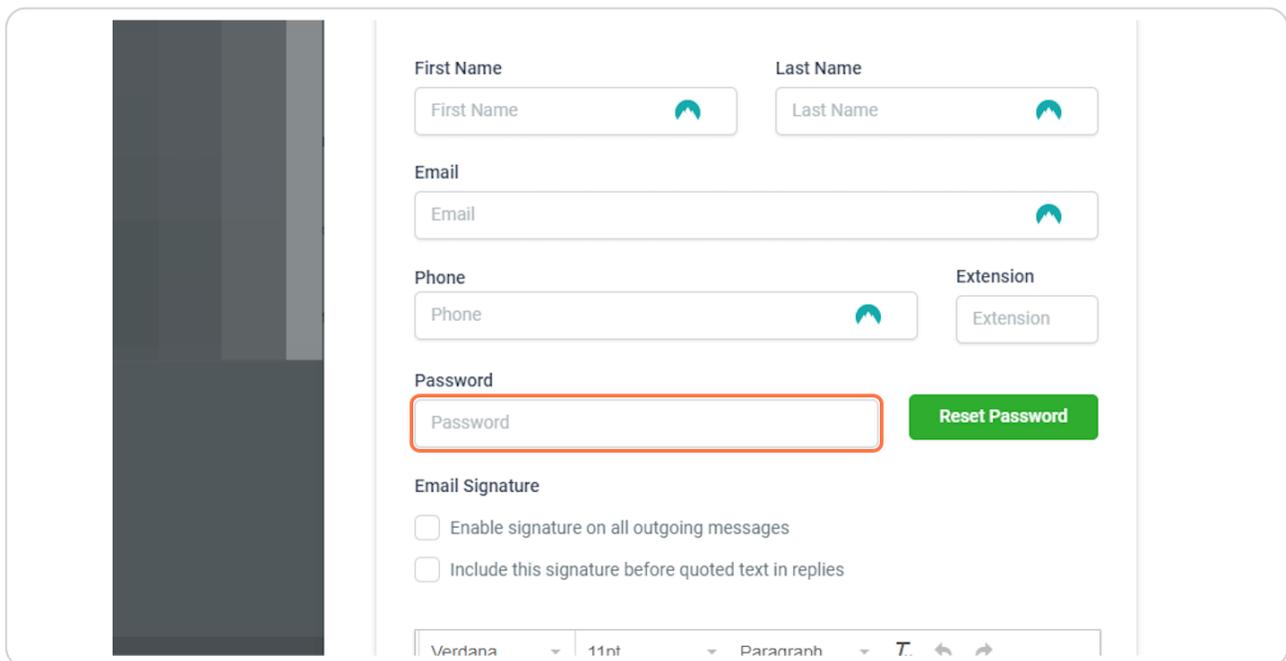
STEP 5

Click on User Info



STEP 6

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



The screenshot shows the user information form. The 'Password' field is highlighted with a red border. The form includes fields for First Name, Last Name, Email, Phone, and Extension. There is a 'Reset Password' button and two checkboxes for email signature settings. A rich text editor is visible at the bottom.

First Name:

Last Name:

Email:

Phone:

Extension:

Password:

Email Signature

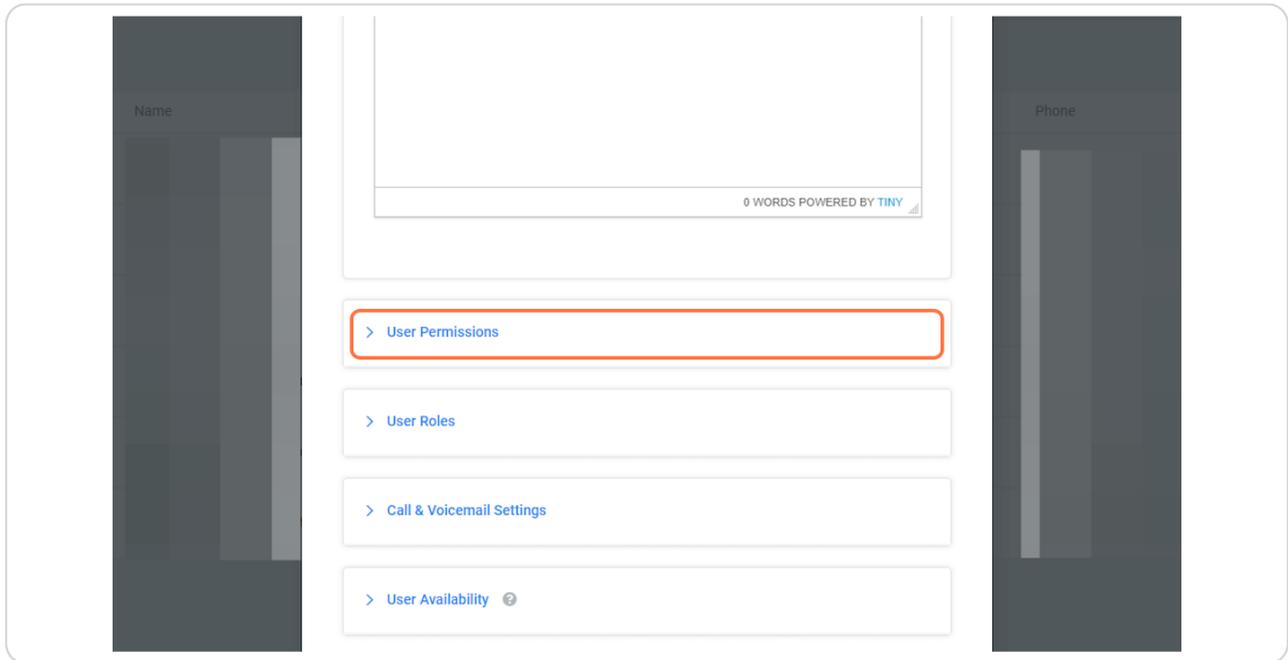
Enable signature on all outgoing messages

Include this signature before quoted text in replies

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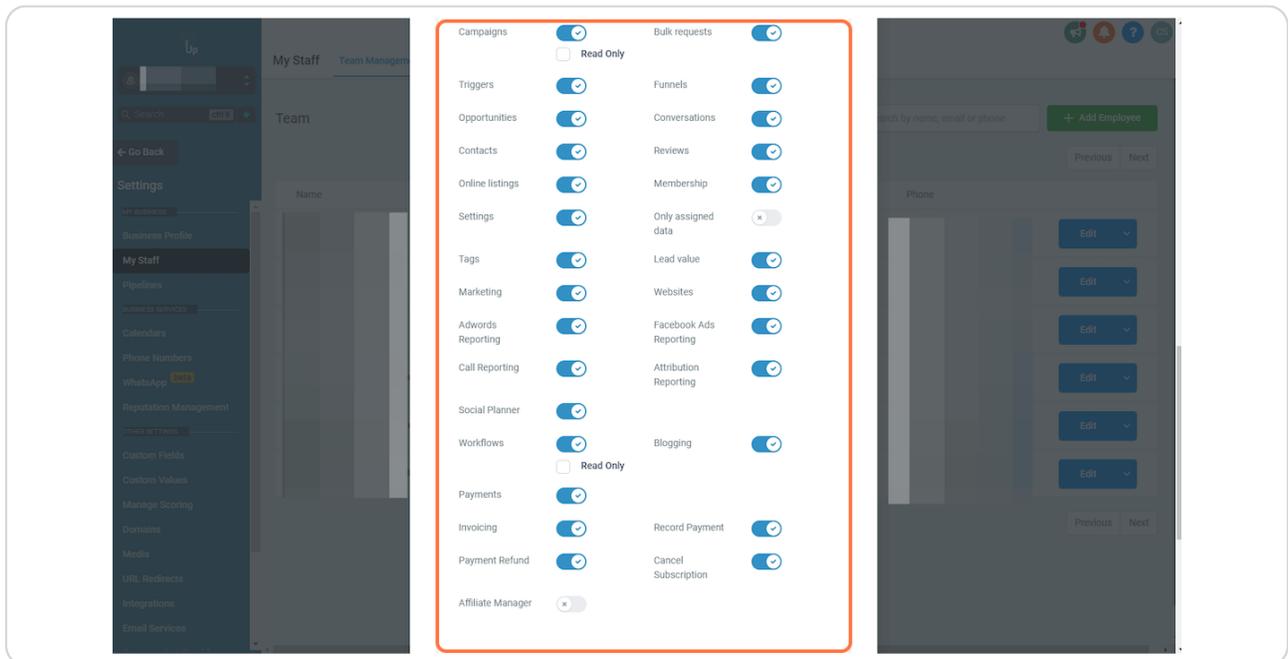
STEP 7

Click on User Permissions



STEP 8

Select what you want the user to have access



STEP 9

Click on Save

