

General Settings

Set the CRM to ensure it works for you.

- [User Management \(Create and Manage Users\)](#)

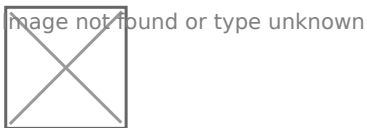
User Management (Create and Manage Users)

System Administrators can manage users to ensure they have the correct access, functionality and roles.

Create users

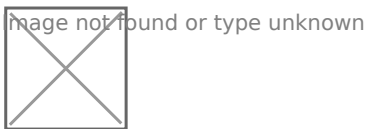
If you are a system Administrator you can manage all settings via Advanced System Settings > Advanced Settings

1. Click "Advanced Settings"

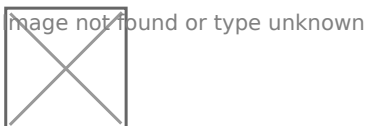


Tip! If you cannot see the Advanced Settings link then you are NOT set an Advanced User. If this is the case please contact your Manager to discuss access.

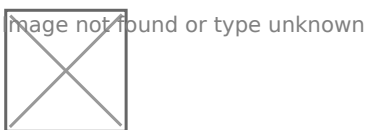
2. Click "User Management"



3. If you want to amend a specific user settings click Edit



4. Click here.



5. Manage Role and Access. One of the most important aspects of the user on-boarding process is role management. Roles add or restrict access to what users can and cannot do.



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