

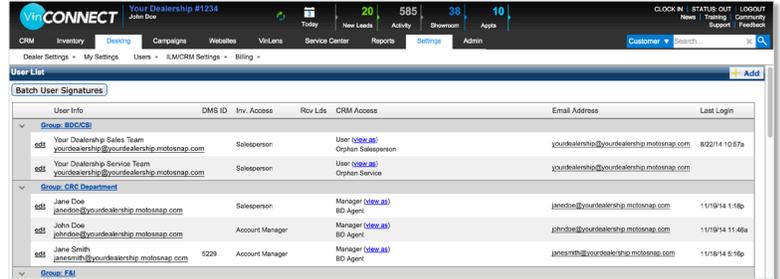


Admin: Add and Delete Users

Add User

To add a user go to: *Settings > User List > Add*, from there, proceed to add the following:

- **Username:** First Initial/Last Name/Store Number (ex: Jsmith0001)
- **Password:** Minimum of 7 characters with at least 1 number and 1 capital letter.
- **Email Signature** must be added for every active employee in VinConnect. No emails without signatures!
- **Hours:** Very important if leads are being assigned based on reps schedules. Must update daily/ weekly based on schedule.
- **Title:** Populates Auto Fill Fields in Email templates.
- **Sales Teams:** Gives the ability to separate employees into teams for reporting purposes.



User Settings: NEW

User Information Alerts Advanced Settings

Username:

Password:

Confirm:

First Name:

Last Name:

Email:

Work Phone: ext

Cell Phone:

Home Phone:

Pager:

Fax:

Hours

	Off	From	To
Monday	<input type="checkbox"/>	8:00 AM	8:00 PM
Tuesday	<input type="checkbox"/>	8:00 AM	8:00 PM
Wednesday	<input type="checkbox"/>	8:00 AM	8:00 PM
Thursday	<input type="checkbox"/>	8:00 AM	8:00 PM
Friday	<input type="checkbox"/>	8:00 AM	7:00 PM
Saturday	<input type="checkbox"/>	8:00 AM	7:00 PM
Sunday	<input checked="" type="checkbox"/>		

[Set to defaults](#)

User Settings: NEW

User Information Alerts Advanced Settings

Title:

Department:

Sales Team: -- Select -- (manage)

Show on website:

Show on CRM kiosk:

Inventory Access: Account Manager

ILM/CRM Access: None

Sales Leads

Inventory/ILM/CRM Access: What can they see and do?

Inventory Access	ILM/CRM Access
Salesperson: It allows the user to associate a customer with a vehicle. They can email options and photos to the customer. They can search for inventory but can't edit any vehicles. They don't have the "Inventory" main tab or any of the reports.	Salesperson: This allows the user to add customers, send emails, clear tasks, and send information on vehicles. They cannot view other salesmen's customers by default. They can't flip ownership of leads. They don't have access to the desking, reports, service, or website tabs.
Inventory Manager: These users have the inventory tab and the reports. They can add photos and change details on the car as well as post to Craigslist and eBay and print window stickers and buyers guides.	Manager: These users can see information and customers belonging to others. They have the desking, reports, and campaigns tabs. They can flip ownership of customers and they can add users and change passwords for others.
Account Manager: These users have all the other functions plus they can see cost by default. Also, grants access to the Websites Tabs.	Admin: Full access to all settings within VinConnect, including ILM/CRM Settings. They can create or destroy at will.

*Exceptions for additional access can be granted. Please contact your Performance Manager or Support with questions.

User Type: What will the system tell me to do?

User types serve the purpose of title and role. They do NOT affect access. Primarily, roles are used to group similar users into categories. This allows tasks or actions to be assigned to a role based on your processes. Example: The system can automatically assign a BD agent by choosing from all users that have BD agent selected as a user type.

Deleting User

As soon as someone leaves your dealership you should immediately change their password and delete their email so they can no longer access VinConnect or request to update their password to get back into VinConnect. To do this go to *Settings > Users*, and click *Edit* on appropriate user.

Before you delete the user you should ensure that they have no outstanding follow-up tasks and reassign their customers to sales people or the orphan bucket. Also, ensure that you make the right decision regarding triggering the sales rep change process.

Customer	Hot	Status / Source	Updated	Age
Your Dealership				
John Doe 2010 Ford F-150 [100722]		Delivered Phone Up	11/11/14 12:13p	1785
The prospect just viewed this email. (dismiss) (Edit)				
Assigned To: Jane Smith Type: Assigned Task				
Reply to customer email (dismiss) (Edit)				
Assigned To: Jane Smith Type: Assigned Task				
Reply to customer email (dismiss) (Edit)				
Assigned To: Jane Smith Type: Lead Task				
John Smith 2011 Ford Fiesta [B38398A]		Pending Finance Vinsolutions - Finance Application	11/14/14 1:37p	15
Reply to customer email (dismiss) (Edit)				
Assigned To: Jane Smith Type: Assigned Task				

Status	Name	Customers	Re-assign
Active	Your Dealership Sales Team	261	Re-assign
Active	Your Dealership Service Team	3	Re-assign
Active	John Doe	500	Re-assign
Active	Jane Doe	15	Re-assign
Active	John Smith	1	Re-assign
Active	Jane Smith	67	Re-assign
Active	B Wayne	1	Re-assign
Active	B Allen	1337	Re-assign
Active	T Stark	589	Re-assign
Active	S Summers	979	Re-assign
Active	J Grey	5954	Re-assign
Active	S Lee	18332	Re-assign

Now you can delete the user out of VinConnect by going to *Settings > Dealer Settings > Users*, then click *Delete*.

Username	First Name	Last Name	Access
smith3241	John	Smith	Account Manager
janesmith5342	Jane	Smith	Account Manager
idoe214	John	Doe	Account Manager