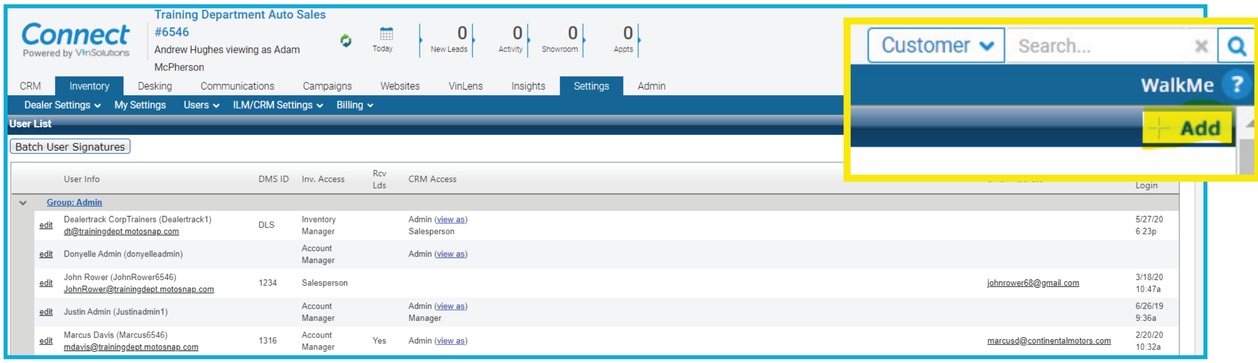
Admin: Add and Delete Users

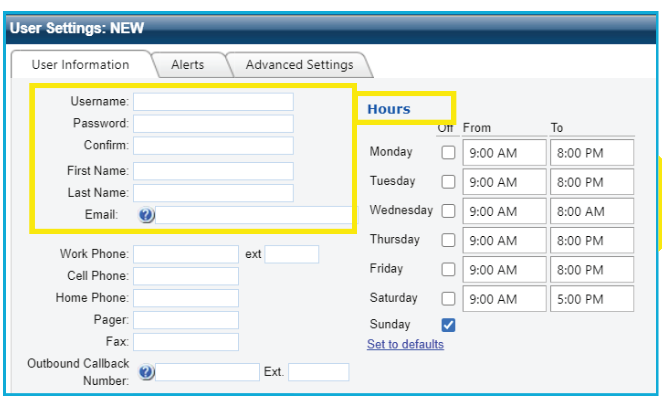
VinSolutions
Make every connection count.

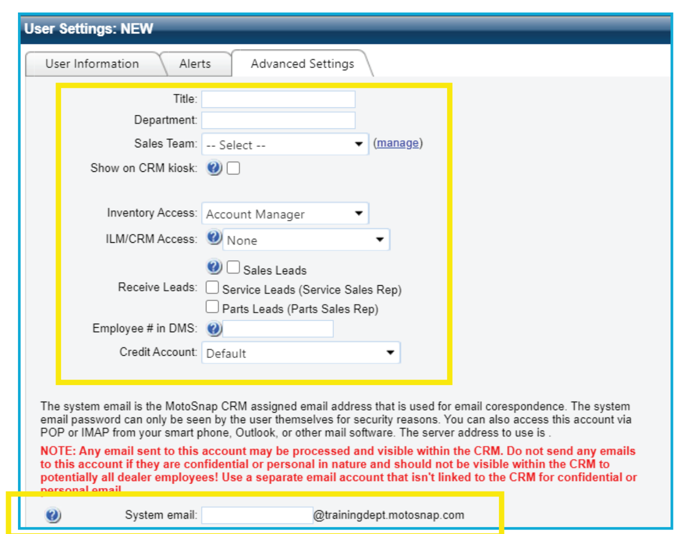
1. Adding User

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.
- Email: Your current work email address. This is what you will use to recover your password and receive alerts.
- System Email: Your CRM email address. Include your first initial and last name (ex. Jsmith) Expand your name or add numbers when needed.
- Receive Leads: Will this person receive internet leads? Check the boxes that apply.
- Employee # in DMS: Not required when creating the user, but important to add if you have this information on hand.





Adding User : 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 havethe "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.

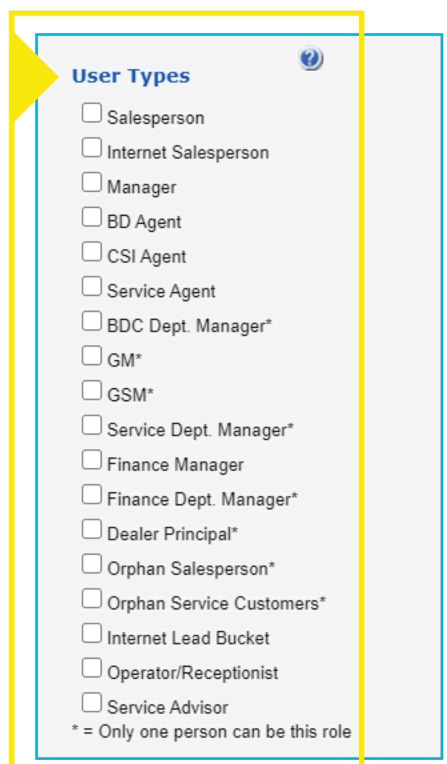
*Exceptions for additional access can be granted. Please contact your Performance Manager or Support with questions.

Adding User : Selecting 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.

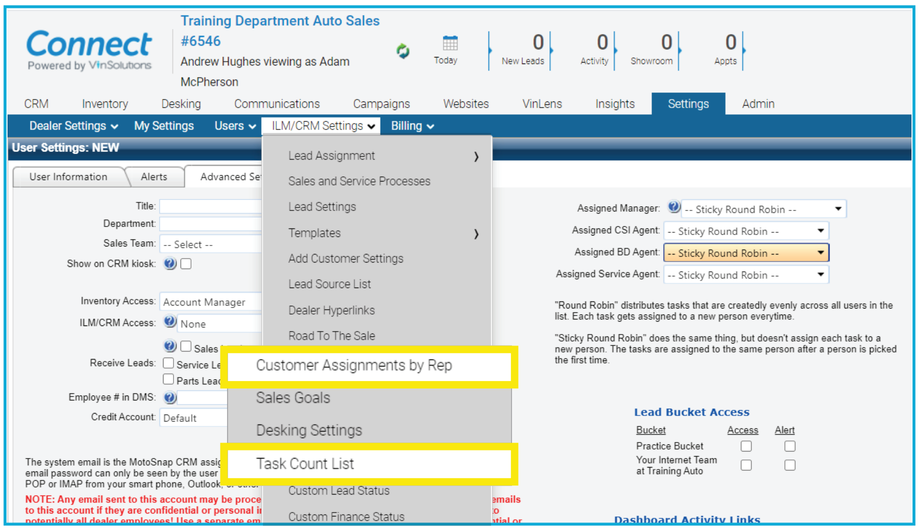


2. Deleting User

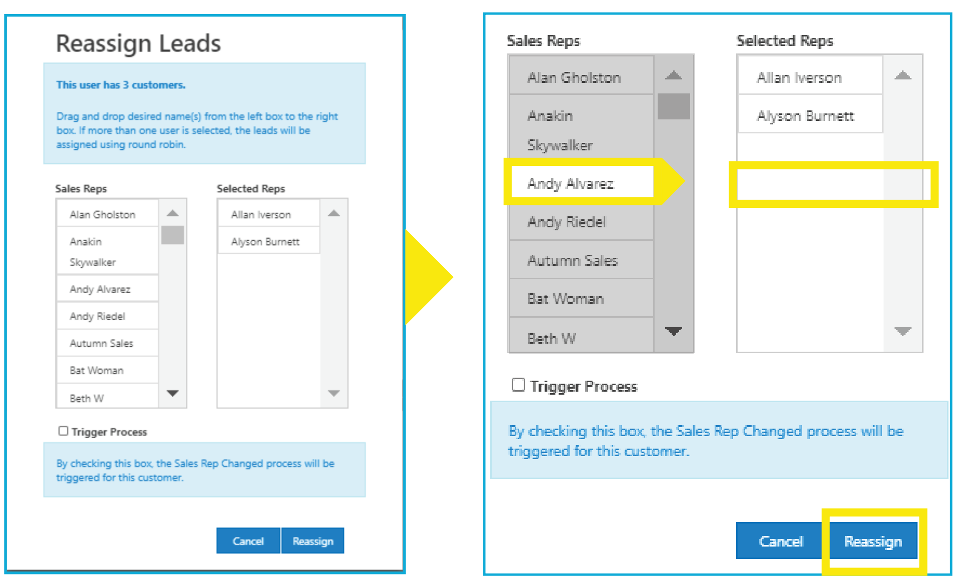
As soon as someone leaves your dealership you should immediately change their password and delete their email so they can no longer access VinConnect or request to update their password to get back into VinConnect. To do this go to Settings > Users, and click Edit on appropriate user.

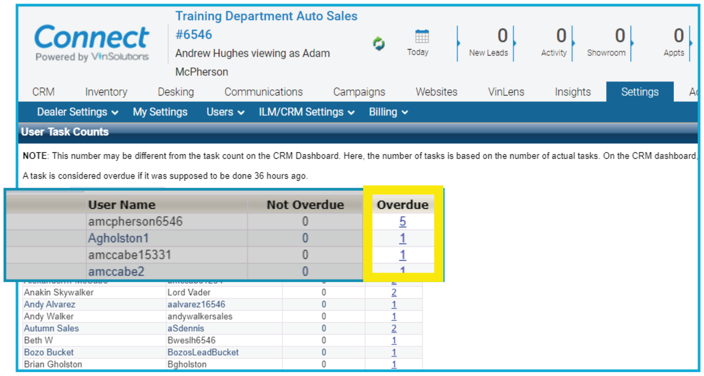
Before you delete the user, you should ensure that they have no outstanding follow-up tasks. You can remove their older task in bulk by going to Settings-> ILM/CRM Settings-> Task Count List.

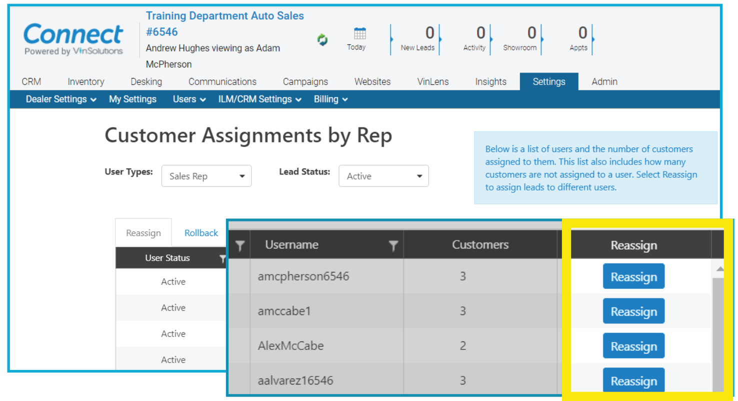
You'll also need to reassign their customers to salespeople or the orphan bucket at Settings-> ILM/CRM Settings-> Customer Assignments by Rep. Also, ensure that you make the right decision regarding triggering the sales rep change process.



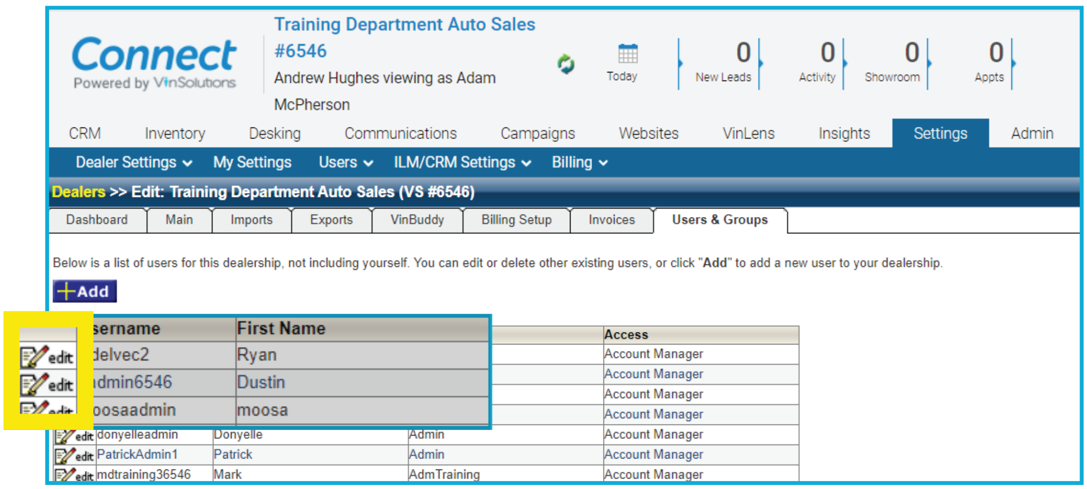
Drag and drop the users or the orphan bucket to the column on the right to have the leads assign equally amongst the selected users. Only check the trigger sales process if you want a task to fire for EVERY lead (usually you should not do this). Click Reassign once you're ready to distribute the leads to your selected users.







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



Check the box next to the dealerships you want to delete this user from. Click on the "Remove access from selected dealership" button and confirm "Ok" to delete the user.