



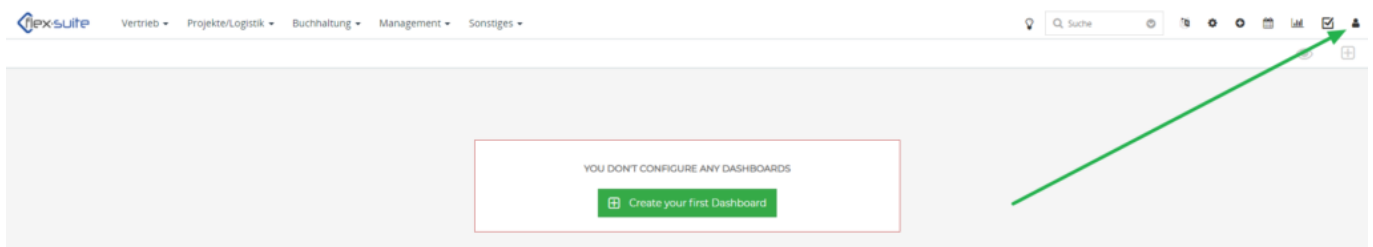
Flexx.Suite

7.User management

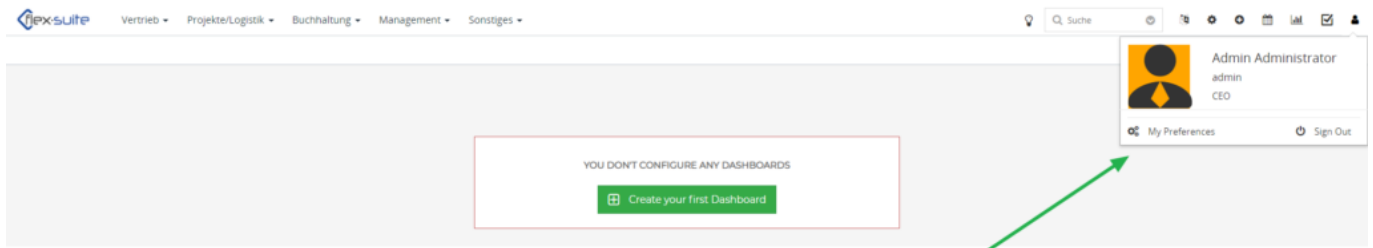
Setting up the new User Account

To set up a User Account you need to move to the Settings page

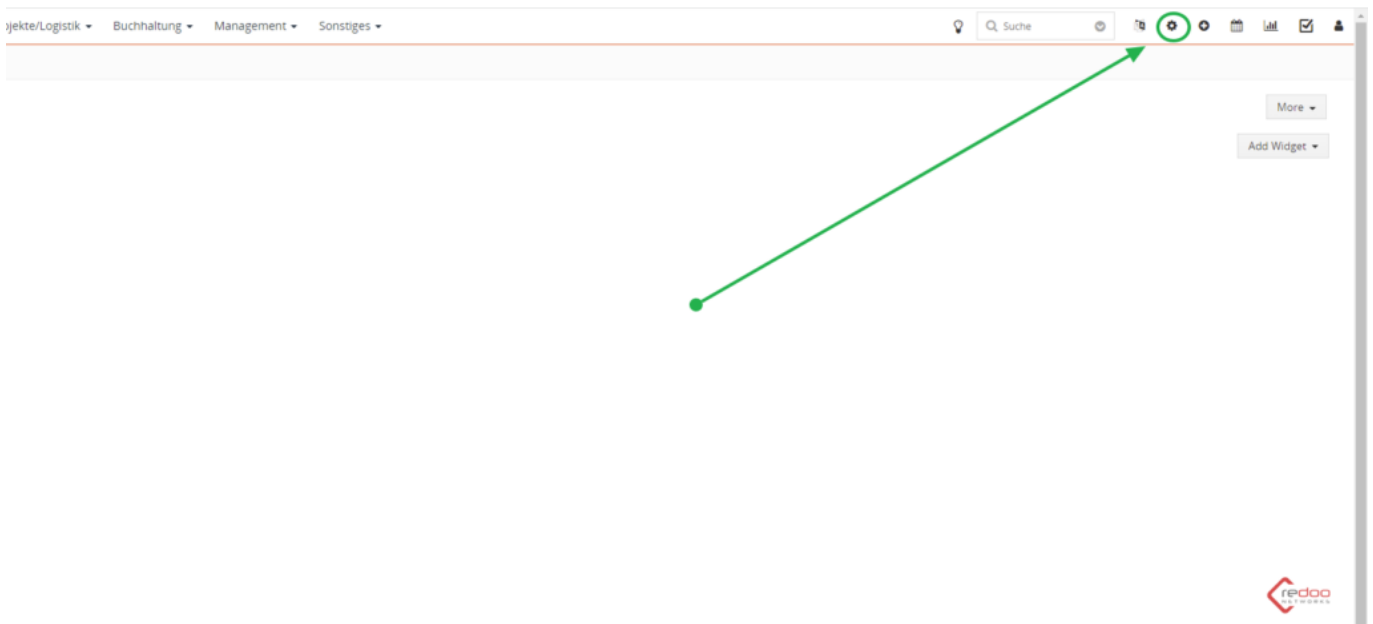
Click on the marked symbol.



Now click on "My Preferences".



To open a settings page in another way click on the "Gear" symbol in the right side of the top bar



Now you are in the Settings page

HOME > My Preferences > Admin Administrator

Search settings

- USER MANAGEMENT
- MODULE MANAGEMENT
- SYSTEM
- AUTOMATION
- CONFIGURATION
- MARKETING & SALES
- INVENTORY
- MY PREFERENCES

My Preferences

- Calendar Settings
- My Tags
- INTEGRATION
- EXTENSIONS
- OTHER SETTINGS

My Preferences

Viewing user details "Admin Administrator"

Edit More

User Login & Role

User Name	admin	Email	sysadmin@redoo-networks.com
First Name	Admin	Last Name	Administrator
Admin	Yes	Role	CEO
Default Lead View	Today	Status	Active
Soll-Arbeitszeit	0	Name relevanter Feiertagsplan	

Currency and Number Field Configuration

Currency	Euro	Digit Grouping Pattern	123.456.789
Decimal Separator	.	Digit Grouping Separator	.
Symbol Placement	\$1.0	Number Of Currency Decimals	2
Truncate Trailing Zeros	Yes		

More Information

Title	Fax		
Department	Other Email		
Office Phone	Secondary Email		
Mobile Phone	Reports To		
Home Phone	Secondary Phone		
Signature	Documents		
Internal Mail Composer	Yes	Language	US English
CRM Phone Extension		Default Record View	Summary
Left Panel Hide	No	Timecontrol Product	
Default Landing Page	Default Homepage		

User Address

Street Address	Country
City	Postal Code
State	

User Photograph

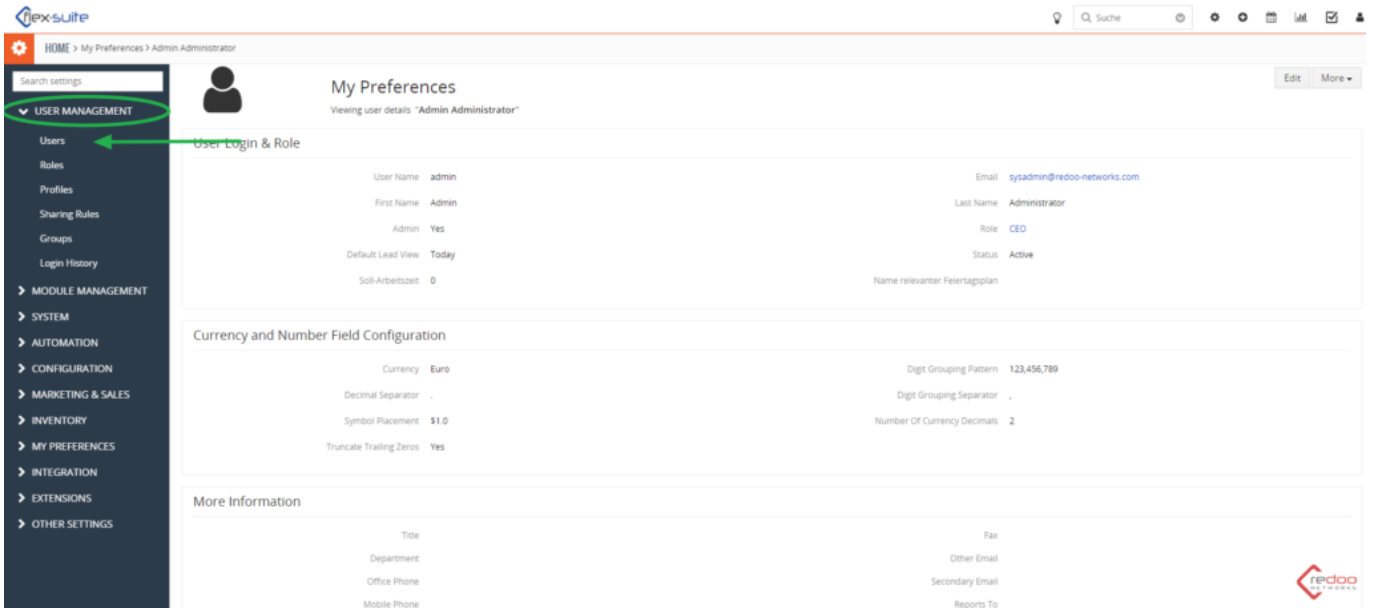
User Image

User Advanced Options

Access Key: QwK4UmAURjYUMb

Powered by flexx.suite v2021-05-17-daily2 - ChangeLog | Generation: 366 ms | Transfer: 62 ms | DGM: 3 ms | Complete Time: 1562 ms

Select **User Management** and click on **Users** option

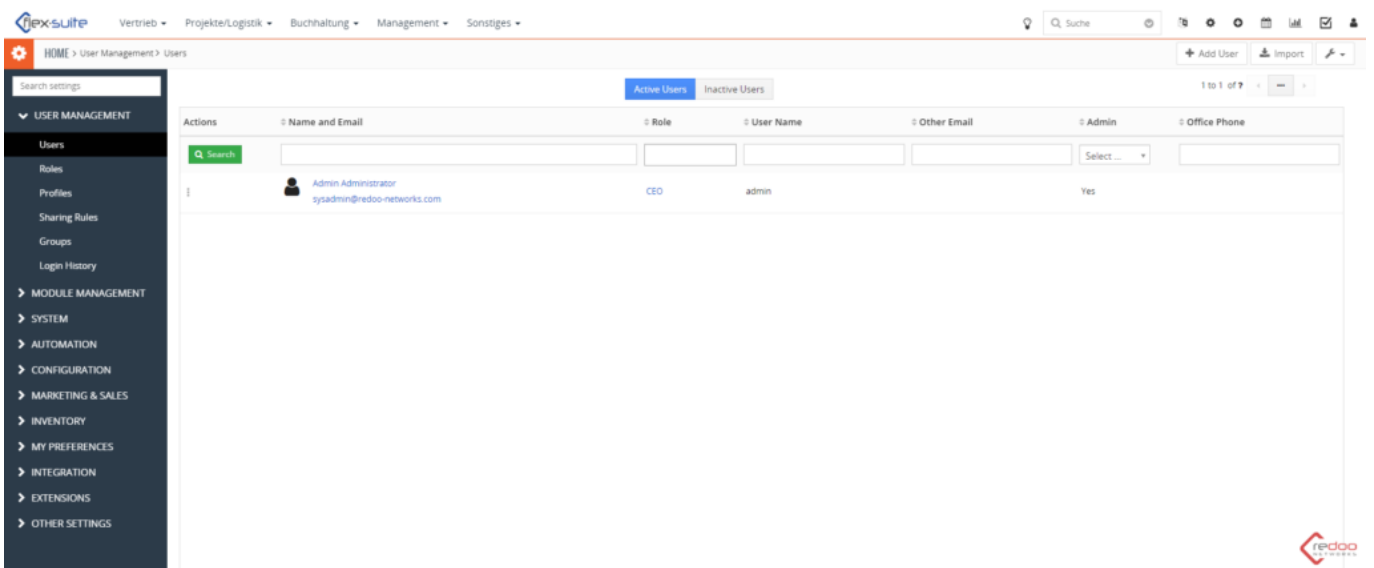


Now you can see the list of all users that have an access to the CRM:

- Name and Email
- Role
- User Name
- Does the User has an admin rights
- Office phone

To add new User press the “Add User” button in the right top corner

You can also see the list of inactive users by pressing the button in the top



This is a create new User page. Here you can define the basic values that will determine the User:

- User Name
- Email
- First and Last name
- Password
- Will the User have admin rights
- Role

You can also set some basic values in sections like:

- Currency and Number Field Configuration
- More Information
- User Address
- User Photo

After you finish press the “Save” button bellow to save

Creating New User

User Login & Role

User Name *	Max Beispiel	Email *	example@mail.com
First Name	Max	Last Name *	Beispiel
Password *	*****	Confirm Password *	*****
Admin	<input type="checkbox"/>	Role *	Sales Manager
Default Lead View	Today	Soll-Arbeitszeit	0
Name relevanter Feiertagsplan			

Currency and Number Field Configuration

Currency	Euro	Digit Grouping Pattern	123,456,789
Decimal Separator	.	Digit Grouping Separator	.
Symbol Placement	\$1.0	Number Of Currency Decimals	2
Truncate Trailing Zeros	<input type="checkbox"/>		

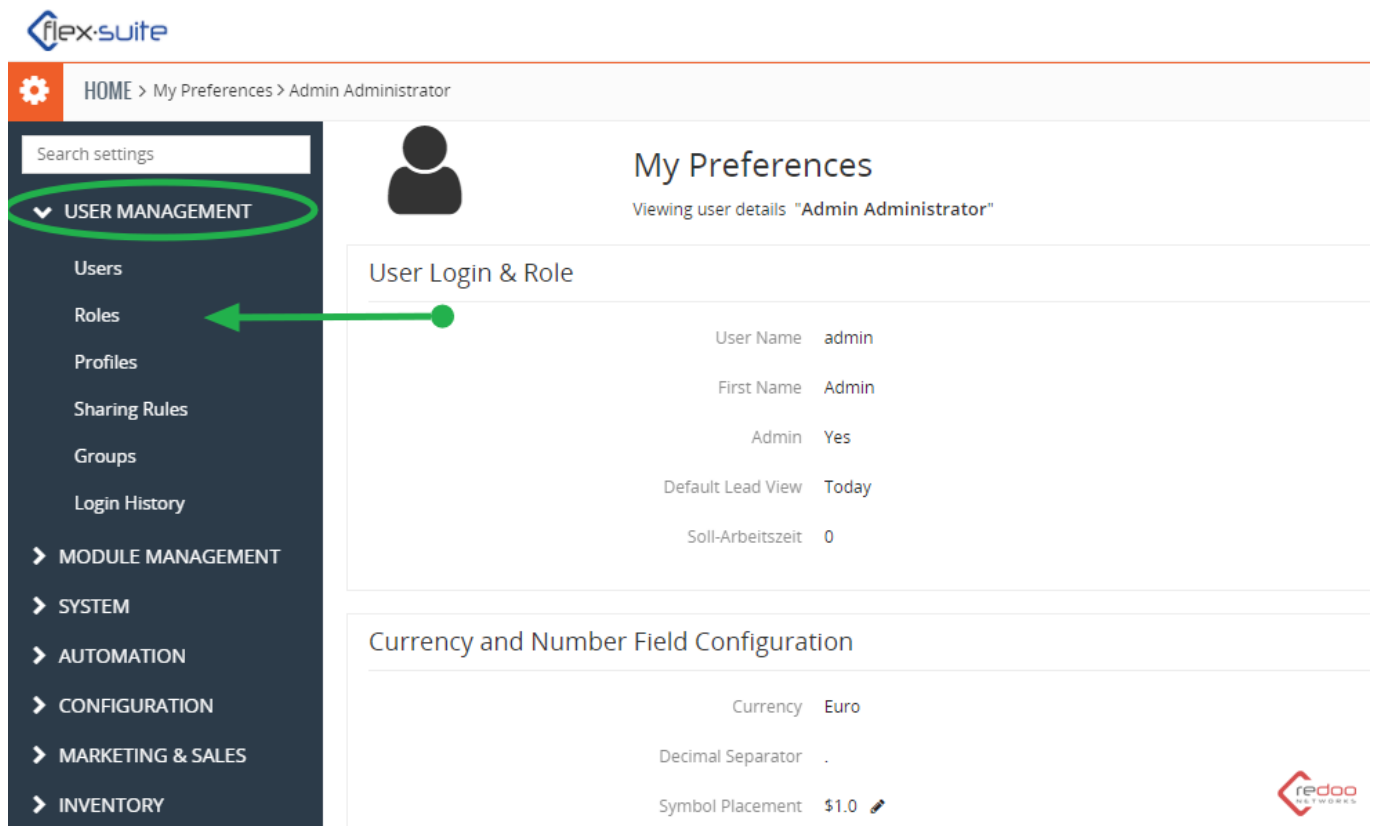
More Information

Save Cancel

User Roles

Every User profile has its Role that defines its relations with other users and its credentials

To manage user roles go to the Preferences page, choose User Management and click on Roles.




The screenshot shows the Flex.Suite interface. The breadcrumb trail is HOME > My Preferences > Admin Administrator. The left sidebar menu is expanded, with 'USER MANAGEMENT' circled in green. A green arrow points from the 'Roles' option in the sidebar to the 'User Login & Role' section in the main content area.


My Preferences
Viewing user details: "Admin Administrator"

User Login & Role

User Name	admin
First Name	Admin
Admin	Yes
Default Lead View	Today
Soll-Arbeitszeit	0

Currency and Number Field Configuration

Currency	Euro
Decimal Separator	.
Symbol Placement	\$1.0 



Now you can see how the Roles system is build

The screenshot shows the 'Roles' page in the Flexx.Suite User Management section. On the left is a dark sidebar menu with a search bar and categories: USER MANAGEMENT (Users, Roles, Profiles, Sharing Rules, Groups, Login History), MODULE MANAGEMENT, SYSTEM, AUTOMATION, CONFIGURATION, and MARKETING & SALES. The main area displays an organization chart with 'Organization' at the top, followed by 'CEO', 'Vice President', 'Sales Manager', and 'Sales Person' in a hierarchical structure.



If you click on any of these entries you will see the deep Role settings page and edit it.

Lets see how CEO Role works

The screenshot shows the 'Edit Role' page for the 'CEO' role. The sidebar menu is visible on the left. The main form contains the following fields and options: 'Name' (CEO), 'Reports To' (Organization), 'Can Assign Records To' (radio buttons for All Users, Users having Same Role or Subordinate Role, Users having Subordinate Role), and 'Privileges' (radio buttons for Assign privileges directly to Role, Assign privileges from existing profiles). A dropdown menu for privileges shows 'Administrator' selected.



Here you can change a role Name

Choose the Role that this one will report to

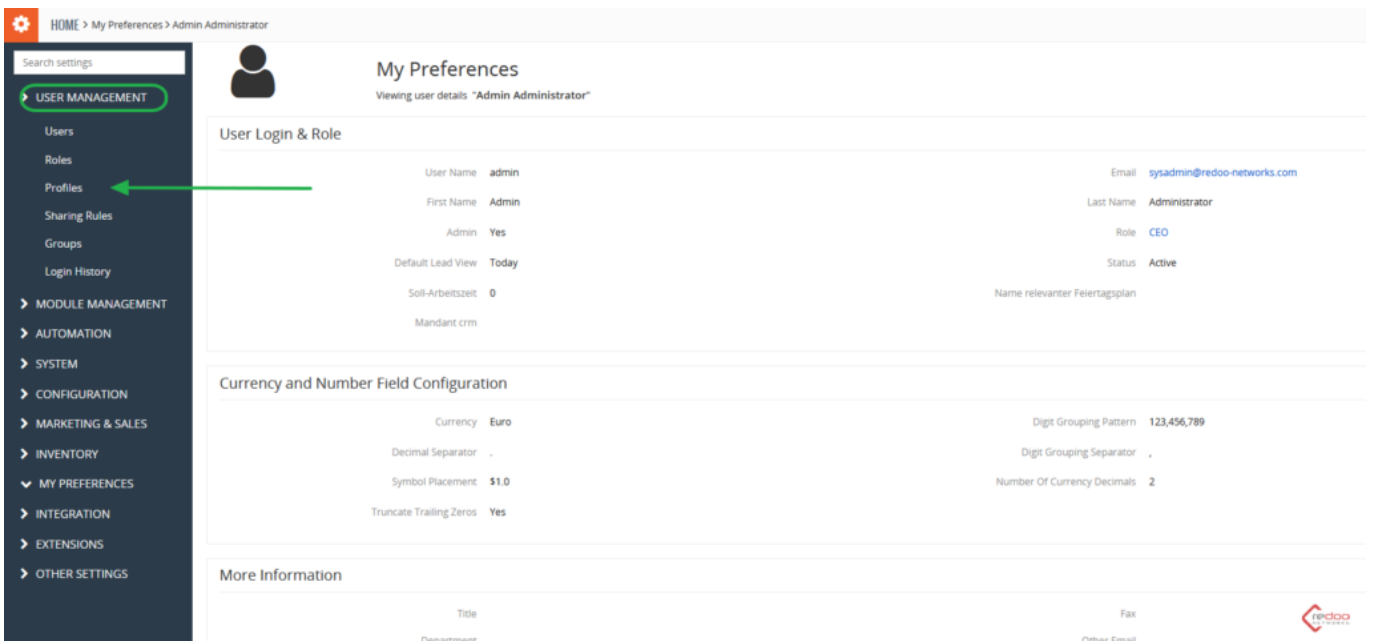
Select if the Role can assign records to other users and if it has privileges assigned from already existing roles or profiles.

- Privileges
- Assign privileges directly to Role
 - Assign privileges from existing profiles

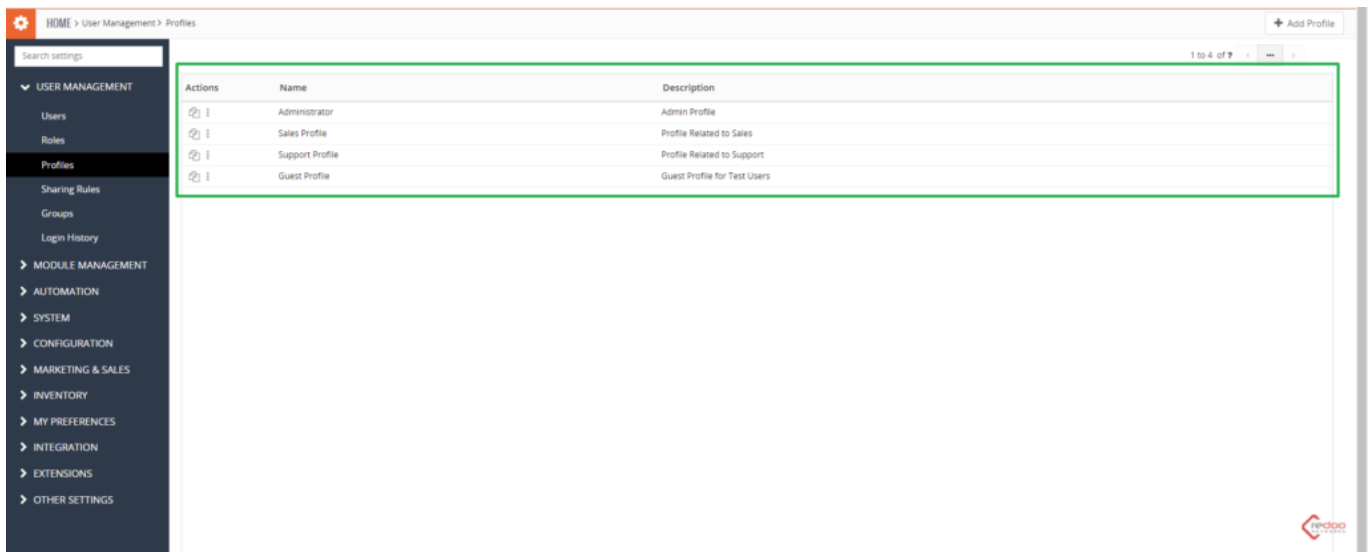


Profiles

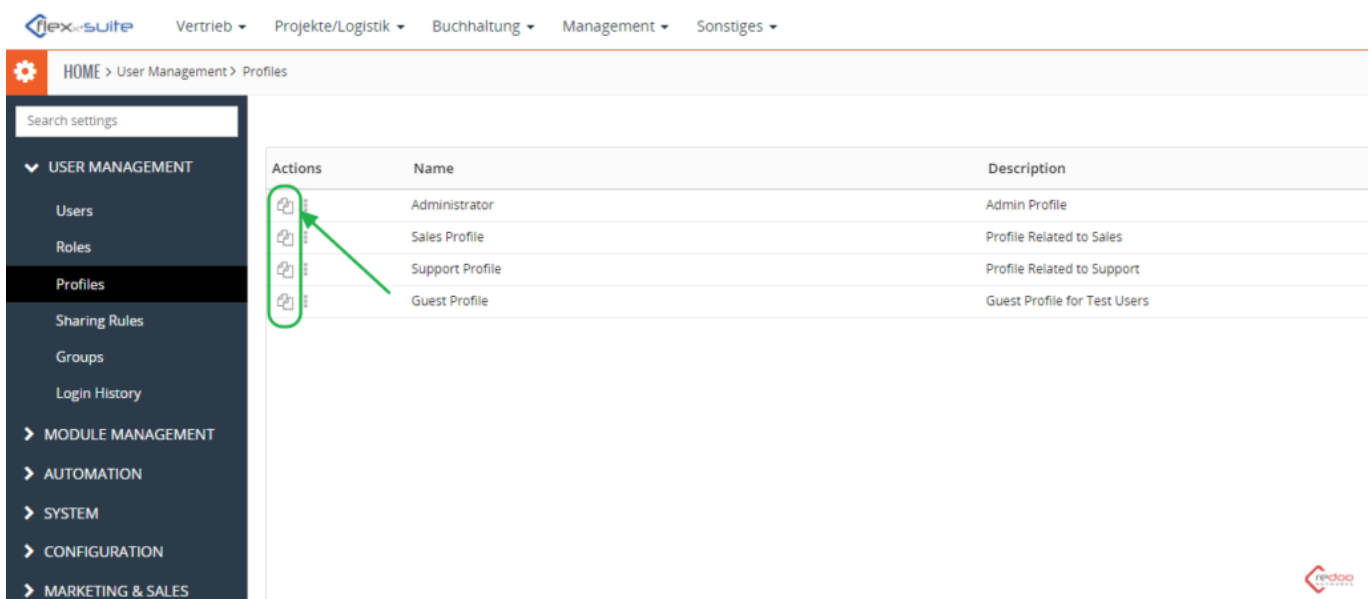
In this section you can set up profiles in your CRM



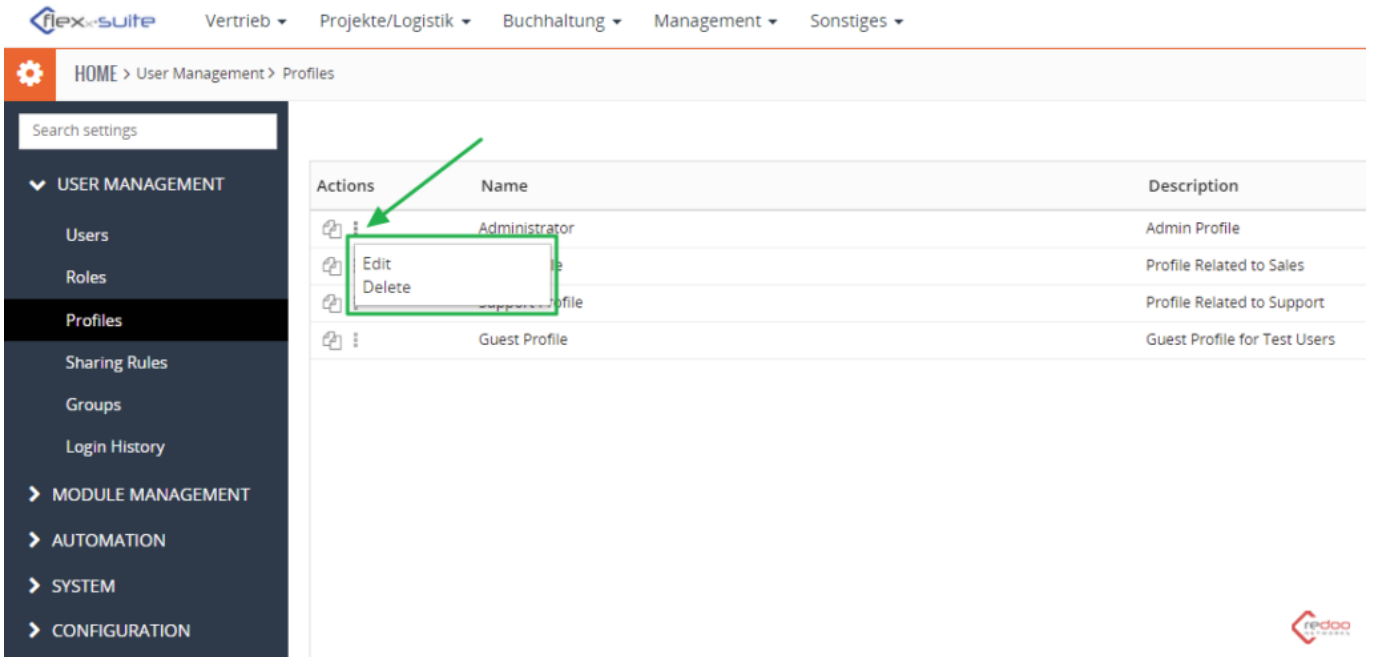
Here you can see the list view of all Profiles within the CRM



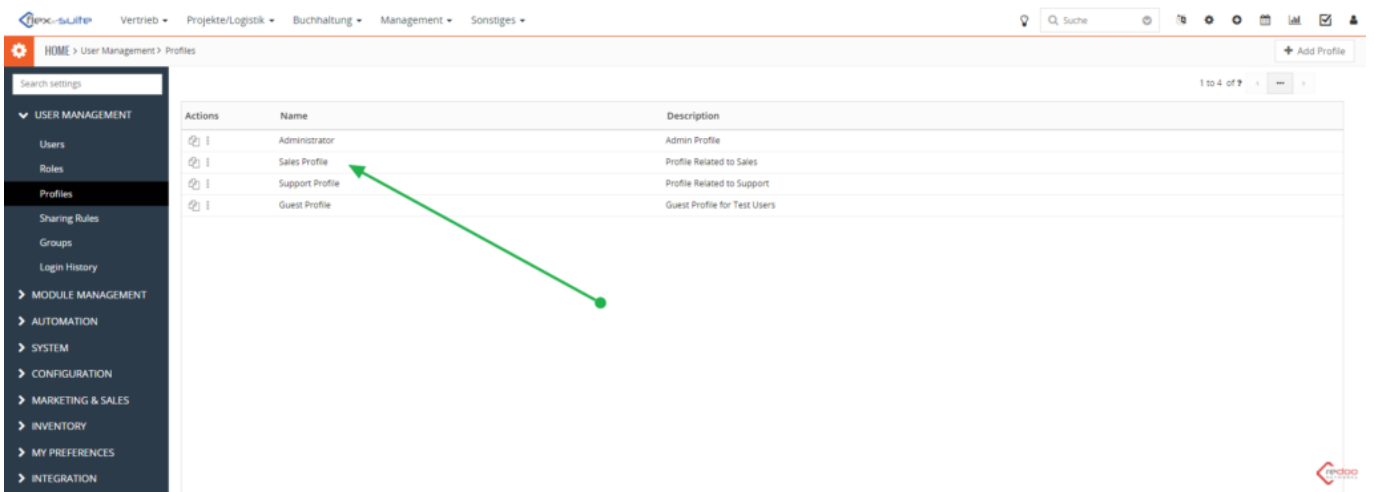
To duplicate a profile press this button like shown in the image



By pressing on this three-dot sign you will open Delete/Edit option pop-up



To see the Profile settings press on the desired field from the list here



In this example we are viewing the Sales Person profile.

In the top panel you can view names of the columns:

- Modules
- View
- Create
- Edit

- Delete
- Field tool Privileges

HOME > User Management > Profiles

Description: Profile Related to Sales

Modules	View	Create	Edit	Delete	Field and Tool Privileges
✓ Dashboards					
✓ Opportunities	✓	✓	✓	✓	▼
✓ Contacts	✓	✓	✓	✓	▼
✓ Organizations	✓	✓	✓	✓	▼
✓ Leads	✓	✓	✓	✓	▼
✓ Documents	✓	✓	✓	✓	▼
✓ Calendar	✓	✓	✓	✓	▼
✓ Emails	✓	✗	✓	✓	▼
✓ Tickets	✓	✗	✗	✗	▼
✓ Products	✓	✓	✓	✓	▼
✓ FAQ	✓	✓	✓	✓	▼
✓ Vendors	✓	✓	✓	✓	▼
✓ Price Books	✓	✓	✓	✓	▼
✓ Quotes	✓	✓	✓	✓	▼
✓ Purchase Orders	✓	✓	✓	✓	▼
✓ Aufträge	✓	✓	✓	✓	▼

Green check marks responds for the right to View, Create, Edit or Delete corresponding module records.

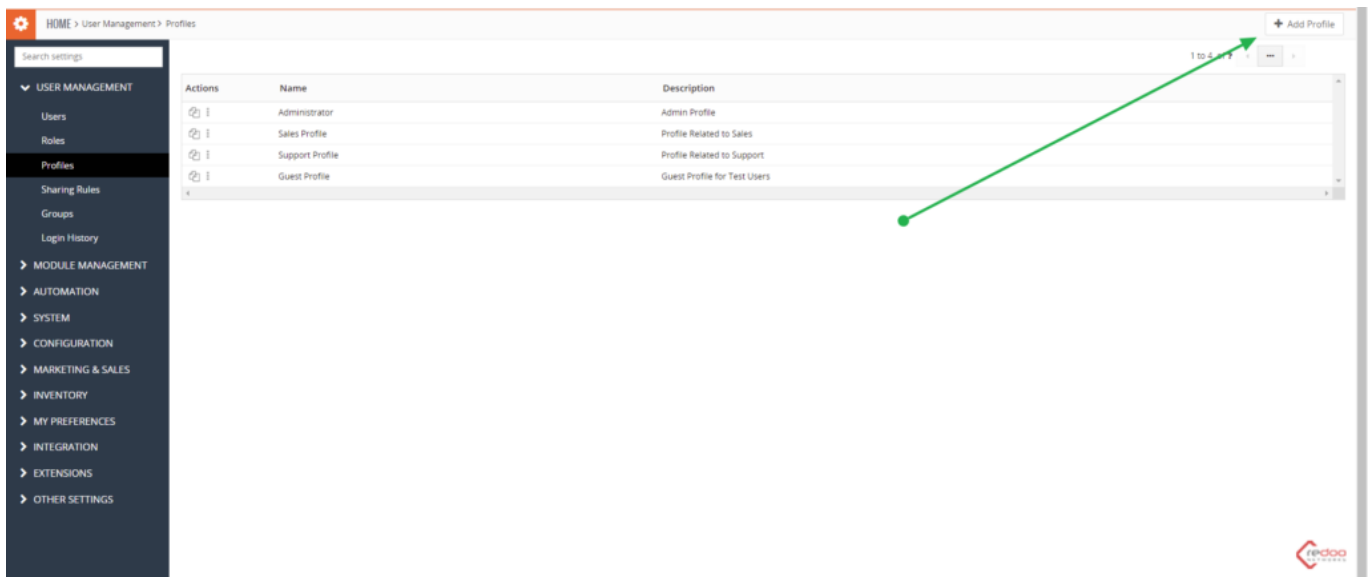
The red ones says that this Profile has no rights to these actions

HOME > User Management > Profiles

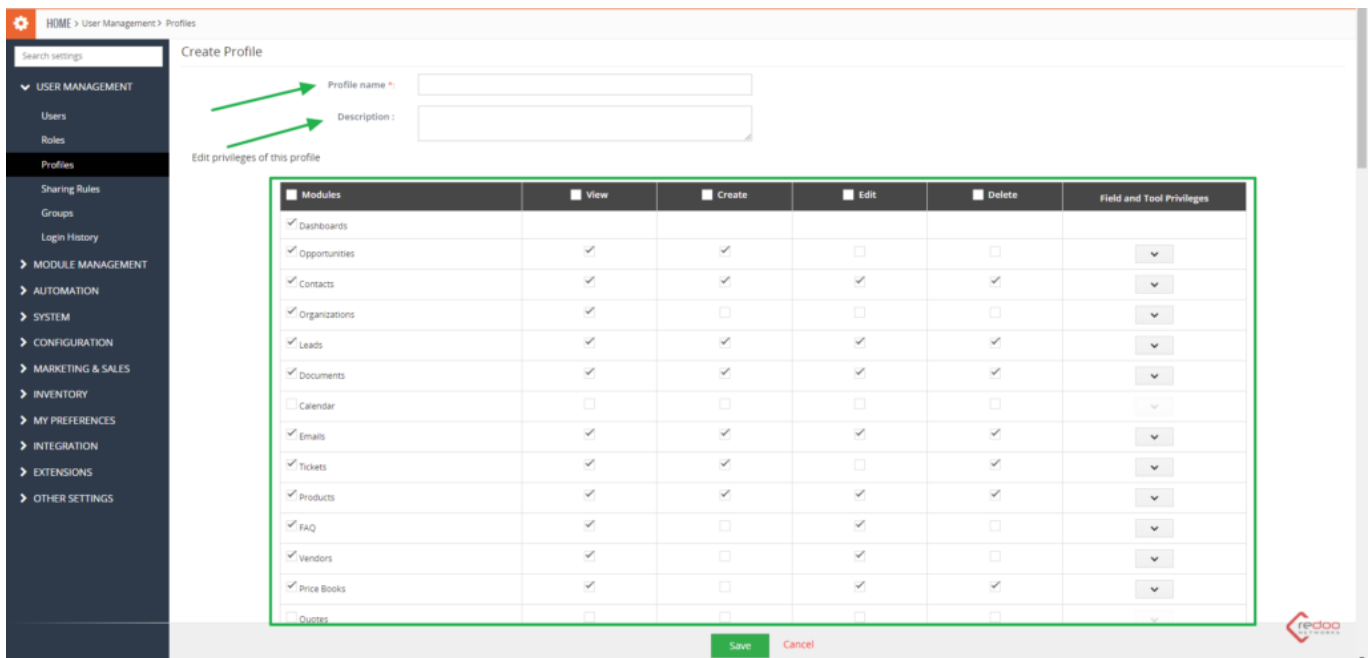
Description: Profile Related to Sales

Modules	View	Create	Edit	Delete	Field and Tool Privileges
✓ Dashboards					
✓ Opportunities	✓	✓	✓	✓	▼
✓ Contacts	✓	✓	✓	✓	▼
✓ Organizations	✓	✓	✓	✓	▼
✓ Leads	✓	✓	✓	✓	▼
✓ Documents	✓	✓	✓	✓	▼
✓ Calendar	✓	✓	✓	✓	▼
✓ Emails	✓	✗	✓	✓	▼
✓ Tickets	✓	✗	✗	✗	▼
✓ Products	✓	✓	✓	✓	▼
✓ FAQ	✓	✓	✓	✓	▼
✓ Vendors	✓	✓	✓	✓	▼
✓ Price Books	✓	✓	✓	✓	▼
✓ Quotes	✓	✓	✓	✓	▼
✓ Purchase Orders	✓	✓	✓	✓	▼
✓ Aufträge	✓	✓	✓	✓	▼
✓ Invoices	✓	✓	✓	✓	▼

To add a new Record press the “Add Record” button below

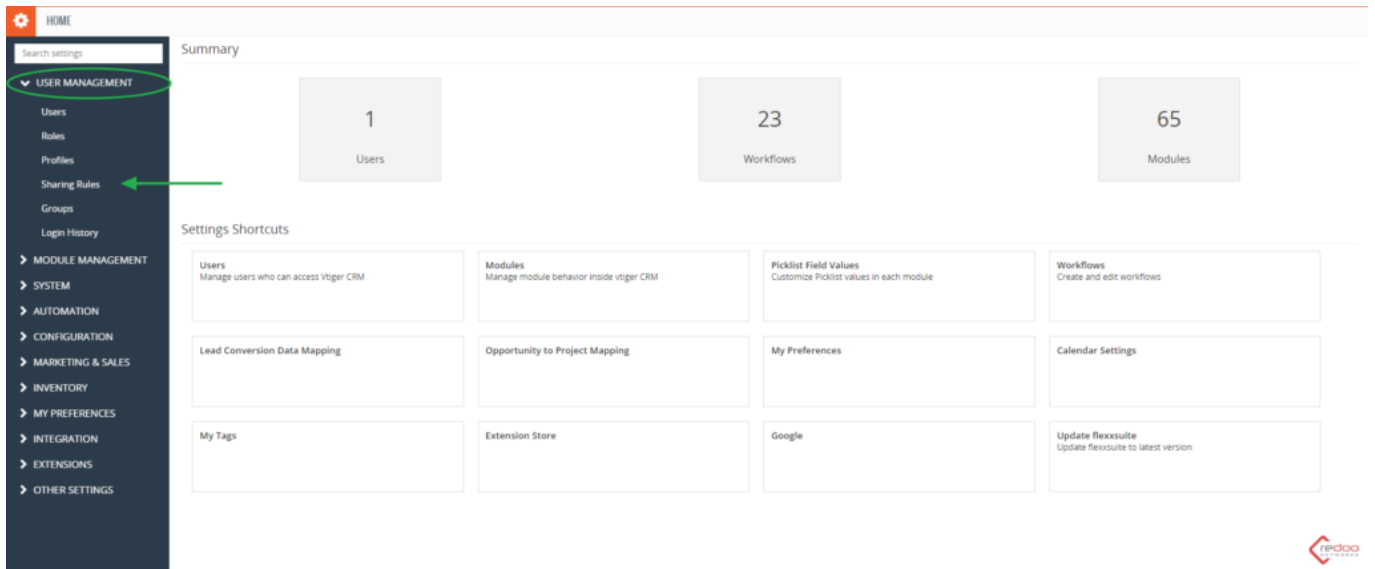


Here you can set a Profile`s name, Description and rights for each individual module



Sharing Rules

To set up Sharing Rules goes to the Settings page - User Management and choose the Sharing Rules option



Here you can see the list of all Modules available in the CRM and Sharing Rules settings like:

- Read Only
- Read, Create/Edit
- Private
- Advanced Sharing Rules

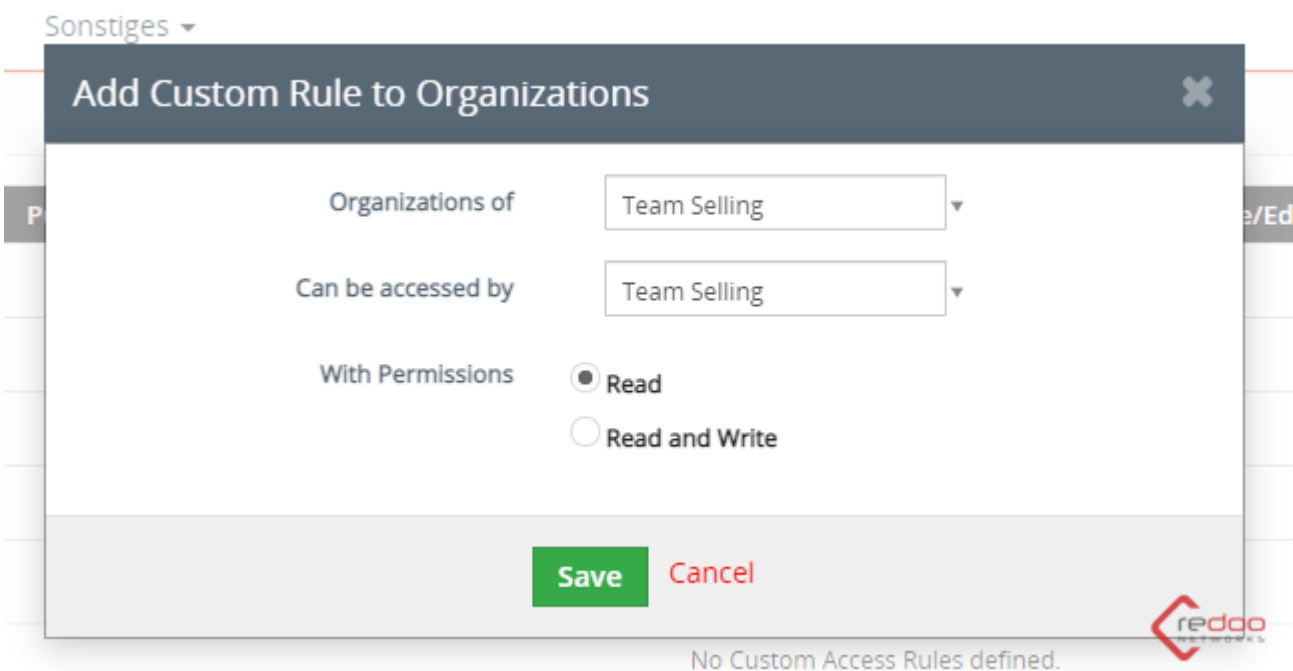
Using these options you can set the privacy settings for each module separately

Module	Public: Read Only	Public: Read, Create/Edit	Public: Read, Create/Edit, Delete	Private	Advanced Sharing Rules
Task	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	▼
Opportunities	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	▼
Contacts	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	▼
Organizations	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	▼
Leads	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	▼
Calendar	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	▼
Tickets	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	▼
Events	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	▼
Quotes	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	▼
Purchase Orders	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	▼
Aufträge	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	▼
Invoices	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	▼
Campaigns	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	▼
Documents	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	▼
Products	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	▼
PBX Manager	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	▼
Service Contracts	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	▼
Services	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	▼
Assets	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	▼

You are also able to set a custom rule by expanding the module cell and clicking on “Add Custom Rule”



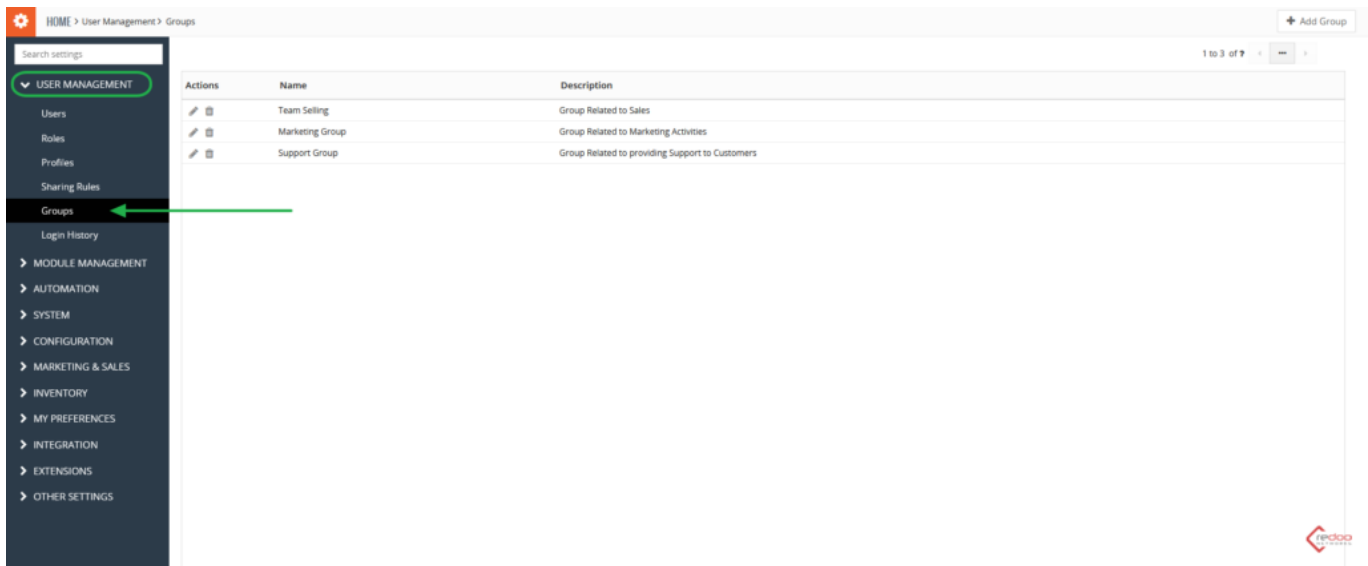
Here you can set “Organization of”, which roles can access the Module records and what permissions they will have



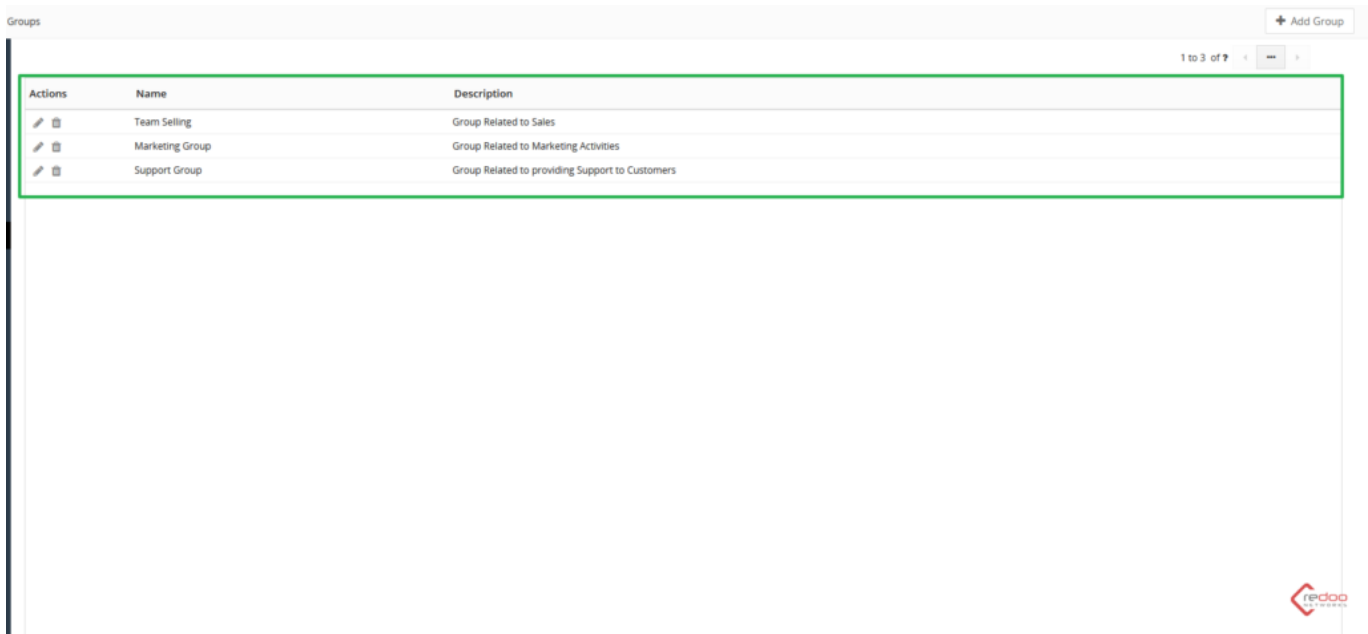
Press “Save” and then “Apply new Sharing Rules” buttons to save changes and continue.

Groups

Another section in User Management is Groups



Here you can view the list of all Groups available in the CRM



The list is divided in three sections:

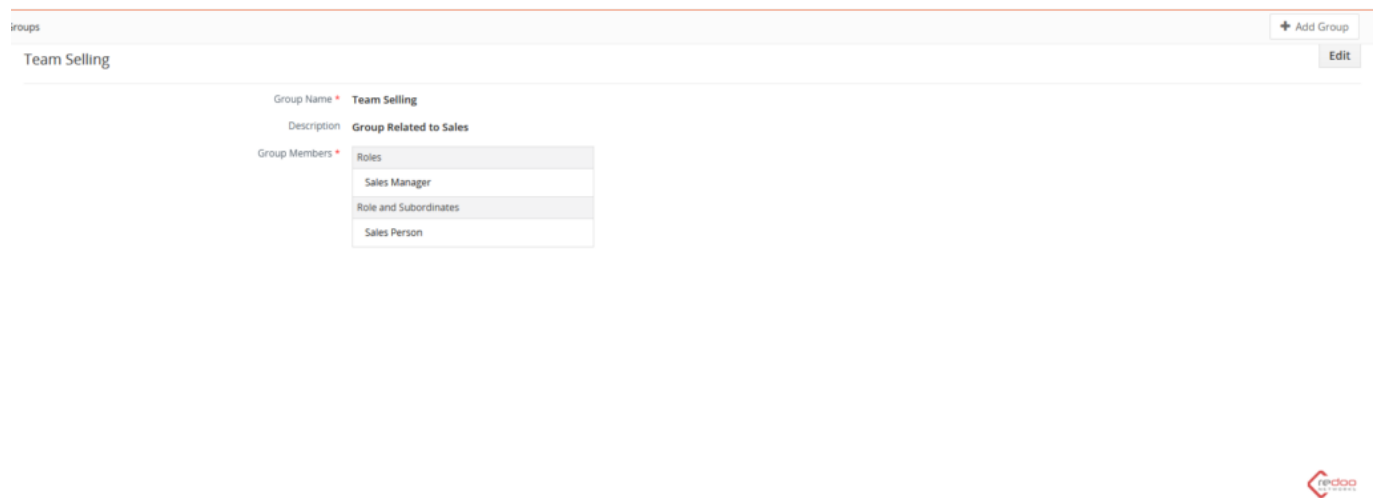
- Actions - for editing or deleting a group

- Name of the group
- Description

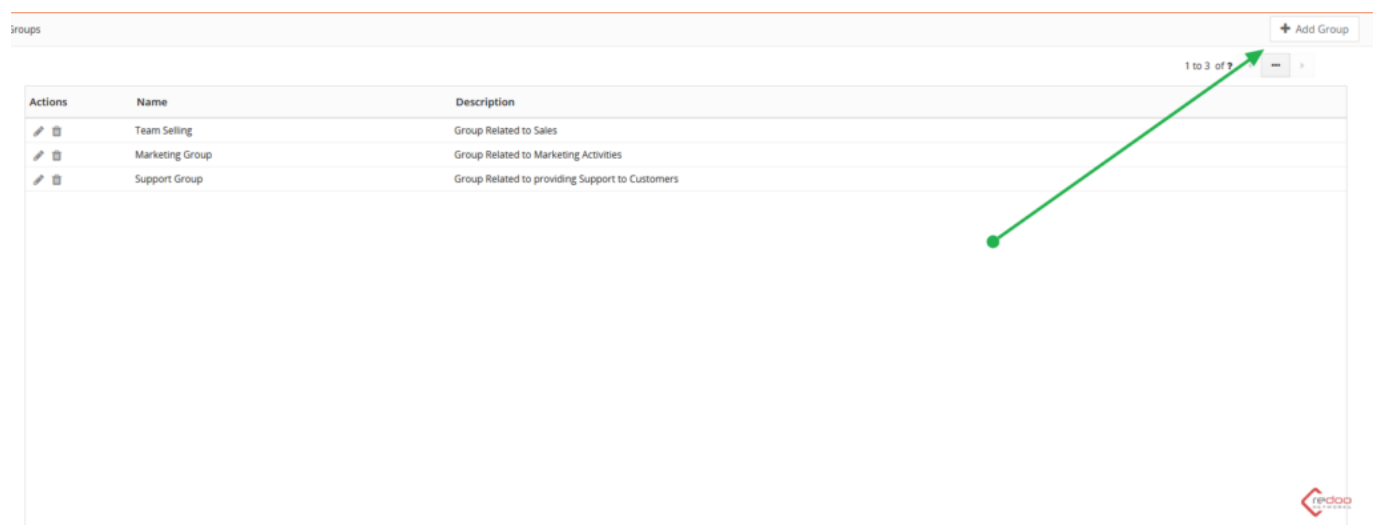
When you press on the Group's name it will lead you to its page

Here you can see the Name, Description and Group members

You can also edit it in here



To add a new Group press the "Add Group" button in the upper right corner



When you are creating a new group choose its name,

Set a Description

And select Group Members from Users, other Groups, Roles, Role and Subordinates lists available in your CRM system

groups

Creating New Group

Group Name *

Description

Group Members *

- Users
- Groups
- Roles
- Role and Subordinates



After you have created a new group it will be available to view

Groups

New Group

Group Name * **New Group**

Description

Group Members *

Users
Admin Administrator
Groups
Team Selling
Roles
CEO
Sales Person
Role and Subordinates
Sales Manager



Login History

Login History is a page where you can view log ins that were made by any user

HOME > User Management > User Login History

Search settings: All

1 to 20 of 20

User Name	User IP Address	Sign-in Time	Sign-out Time	Status
Admin Administrator	192.168.48.13	17-06-2022 17:00:16	---	Signed in
Admin Administrator	192.168.48.13	15-06-2022 23:58:08	---	Signed in
Admin Administrator	192.168.48.13	10-06-2022 15:33:05	---	Signed in
Admin Administrator	192.168.48.13	10-06-2022 15:32:58	---	Signed in
Admin Administrator	192.168.48.13	10-06-2022 15:32:48	---	Signed in
Admin Administrator	192.168.48.13	10-06-2022 02:07:59	---	Signed in
Admin Administrator	192.168.48.13	10-06-2022 02:07:56	---	Signed in
Admin Administrator	192.168.48.13	07-06-2022 11:11:54	---	Signed in
Demo	192.168.48.13	07-06-2022 11:06:25	---	Signed in
Admin Administrator	192.168.48.13	06-06-2022 14:56:21	---	Signed in
Admin Administrator	192.168.48.13	06-06-2022 14:54:38	---	Signed in
Demo	192.168.48.13	06-06-2022 09:25:27	---	Signed in
Demo	192.168.48.13	06-06-2022 09:23:59	06-06-2022 09:25:21	Signed off
Demo	192.168.48.13	06-06-2022 09:23:48	---	Signed in
Demo	192.168.48.13	06-06-2022 09:03:12	---	Signed in
Admin Administrator	192.168.48.13	03-06-2022 13:54:13	---	Signed in
Admin Administrator	192.168.48.13	03-06-2022 13:53:58	---	Signed in
Admin Administrator	192.168.48.13	01-06-2022 15:38:35	---	Signed in
Admin Administrator	192.168.48.13	31-05-2022 15:17:10	---	Signed in
Admin Administrator	192.168.48.13	30-05-2022 17:33:00	---	Signed in

Here you can see information about:

- User Name

- User IP Address
- Sign-in and -out Time
- Status of the login

User Name	User IP Address	Sign-in Time	Sign-out Time	Status
Admin Administrator	192.168.48.13	17-06-2022 17:00:16	---	Signed in
Admin Administrator	192.168.48.13	15-06-2022 23:58:08	---	Signed in
Admin Administrator	192.168.48.13	10-06-2022 15:33:05	---	Signed in
Admin Administrator	192.168.48.13	10-06-2022 15:32:58	---	Signed in
Admin Administrator	192.168.48.13	10-06-2022 15:32:48	---	Signed in
Admin Administrator	192.168.48.13	10-06-2022 02:07:59	---	Signed in
Admin Administrator	192.168.48.13	10-06-2022 02:07:56	---	Signed in
Admin Administrator	192.168.48.13	07-06-2022 11:11:54	---	Signed in
Demo	192.168.48.13	07-06-2022 11:06:25	---	Signed in
Admin Administrator	192.168.48.13	06-06-2022 14:56:21	---	Signed in
Admin Administrator	192.168.48.13	06-06-2022 14:54:38	---	Signed in
Demo	192.168.48.13	06-06-2022 09:25:27	---	Signed in
Demo	192.168.48.13	06-06-2022 09:23:59	06-06-2022 09:25:21	Signed off
Demo	192.168.48.13	06-06-2022 09:23:48	---	Signed in
Demo	192.168.48.13	06-06-2022 09:03:12	---	Signed in
Admin Administrator	192.168.48.13	03-06-2022 13:54:13	---	Signed in
Admin Administrator	192.168.48.13	03-06-2022 13:53:58	---	Signed in
Admin Administrator	192.168.48.13	01-06-2022 15:38:35	---	Signed in
Admin Administrator	192.168.48.13	31-05-2022 15:17:10	---	Signed in
Admin Administrator	192.168.48.13	30-05-2022 17:33:00	---	Signed in

You are also able to sort Login History page by User Name

User Name	User IP Address	Sign-in Time	Sign-out Time	Status
Admin Administrator	192.168.48.13	17-06-2022 17:00:16	---	Signed in
Admin Administrator	192.168.48.13	15-06-2022 23:58:08	---	Signed in
Admin Administrator	192.168.48.13	10-06-2022 15:33:05	---	Signed in
Admin Administrator	192.168.48.13	10-06-2022 15:32:58	---	Signed in
Admin Administrator	192.168.48.13	10-06-2022 15:32:48	---	Signed in
Admin Administrator	192.168.48.13	10-06-2022 02:07:59	---	Signed in
Admin Administrator	192.168.48.13	10-06-2022 02:07:56	---	Signed in
Admin Administrator	192.168.48.13	07-06-2022 11:11:54	---	Signed in
Admin Administrator	192.168.48.13	06-06-2022 14:56:21	---	Signed in
Admin Administrator	192.168.48.13	06-06-2022 14:54:38	---	Signed in
Admin Administrator	192.168.48.13	03-06-2022 13:54:13	---	Signed in
Admin Administrator	192.168.48.13	03-06-2022 13:53:58	---	Signed in
Admin Administrator	192.168.48.13	01-06-2022 15:38:35	---	Signed in
Admin Administrator	192.168.48.13	31-05-2022 15:17:10	---	Signed in
Admin Administrator	192.168.48.13	30-05-2022 17:33:00	---	Signed in
Admin Administrator	192.168.48.13	30-05-2022 17:24:54	---	Signed in
Admin Administrator	192.168.48.13	26-05-2022 15:02:41	---	Signed in
Admin Administrator	192.168.48.13	26-05-2022 13:11:15	---	Signed in
Admin Administrator	192.168.48.13	24-05-2022 11:38:25	---	Signed in
Admin Administrator	192.168.48.13	24-05-2022 10:57:50	---	Signed in

