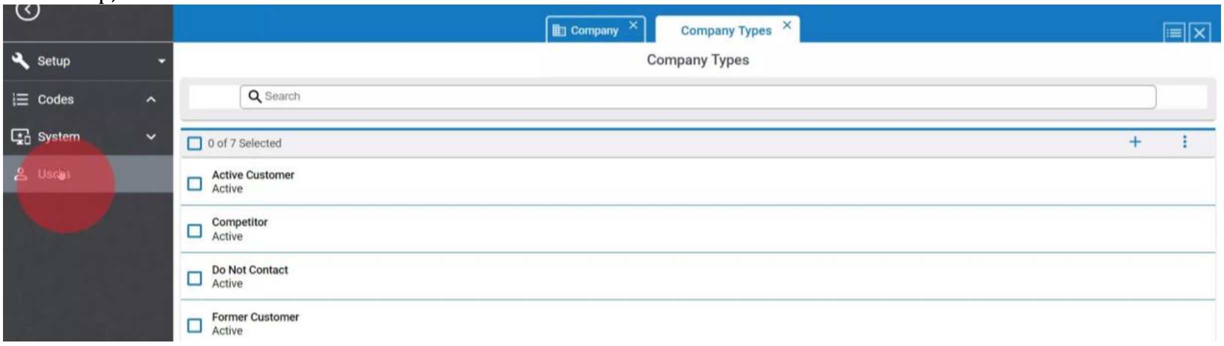
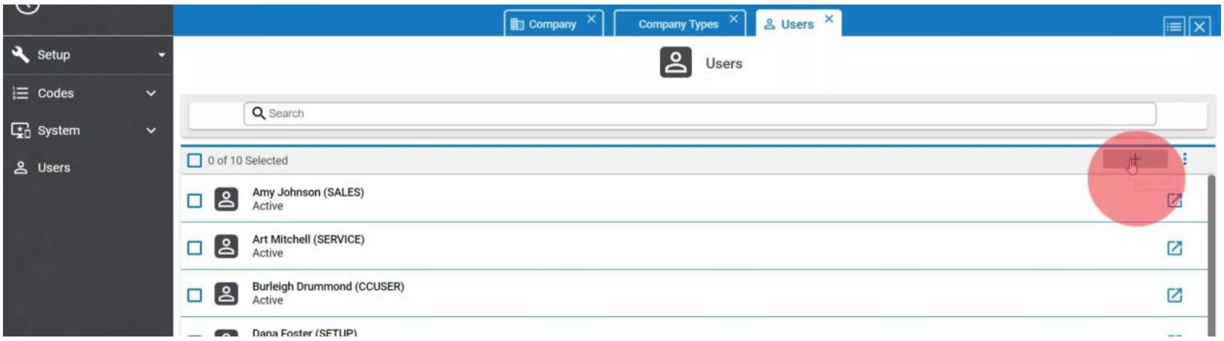
ADD NEW USER

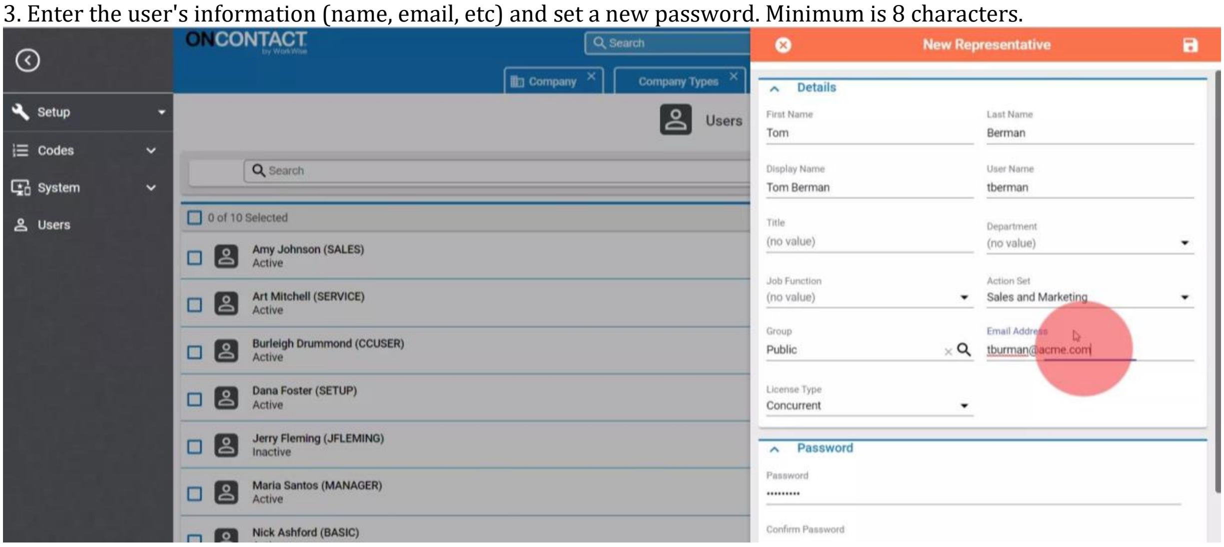
1. In Setup, Click Users



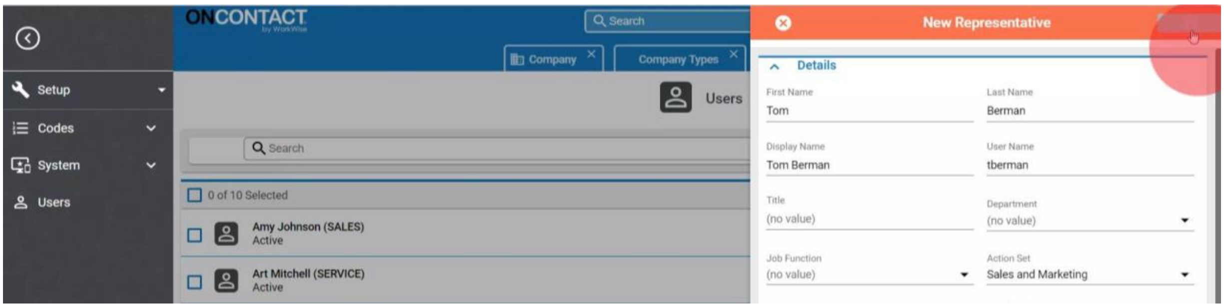
2. Click the Plus icon



3. Enter the user's information (name, email, etc) and set a new password. Minimum is 8 characters.



4. Click to Save



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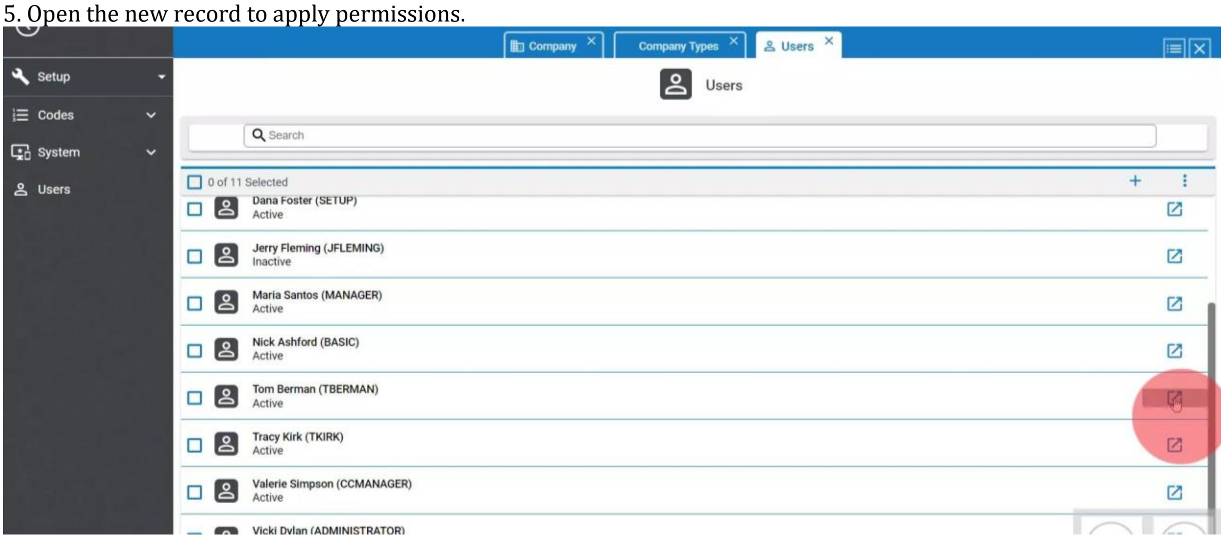
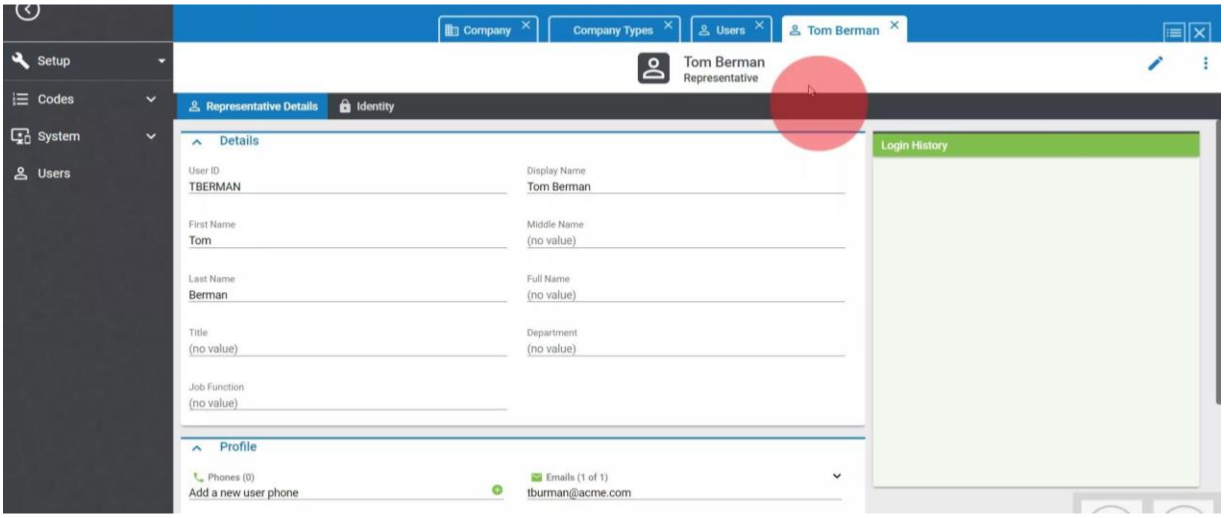
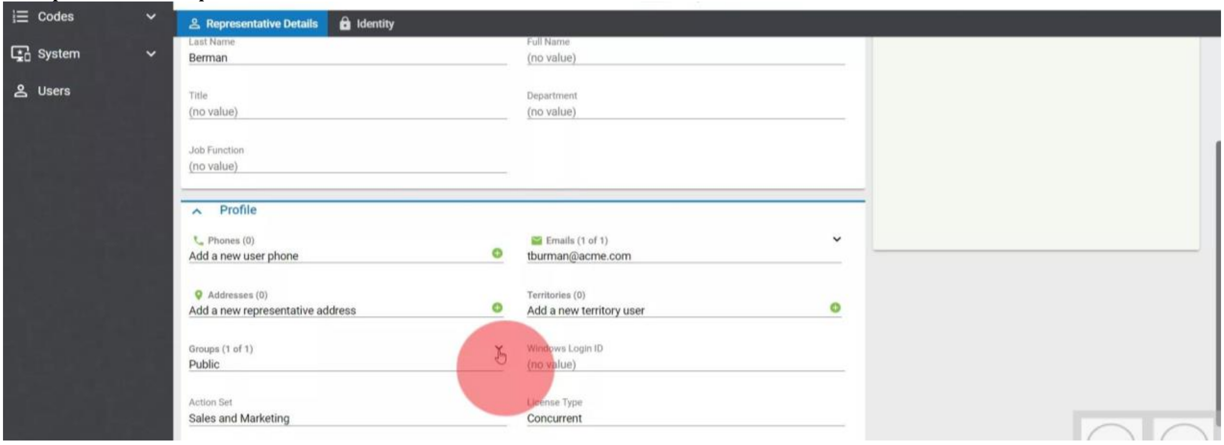
5. Open the new record to apply permissions.



6. Here's the user record.



7. Expand the Groups field in lower-left corner.



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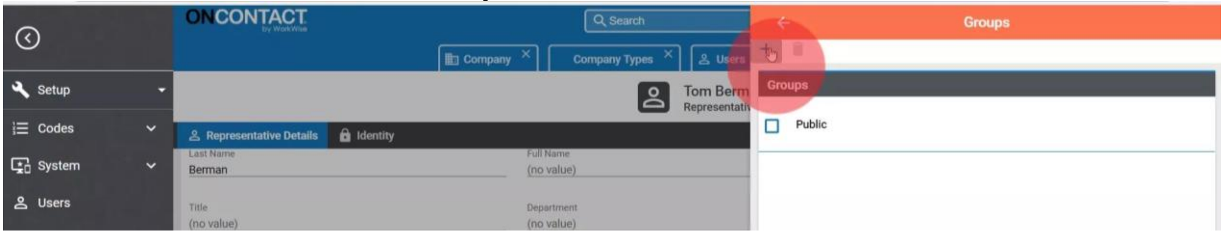
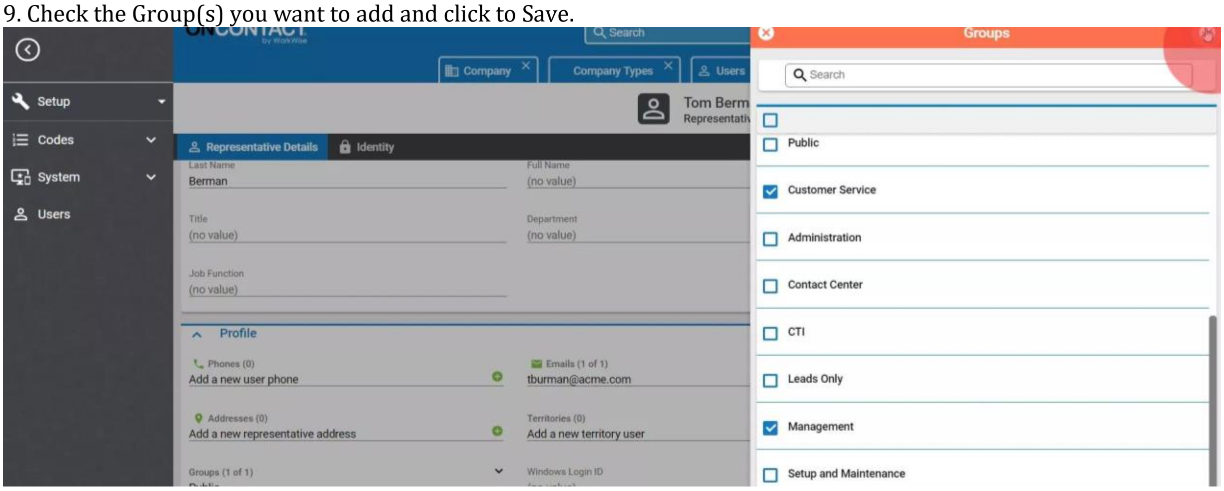
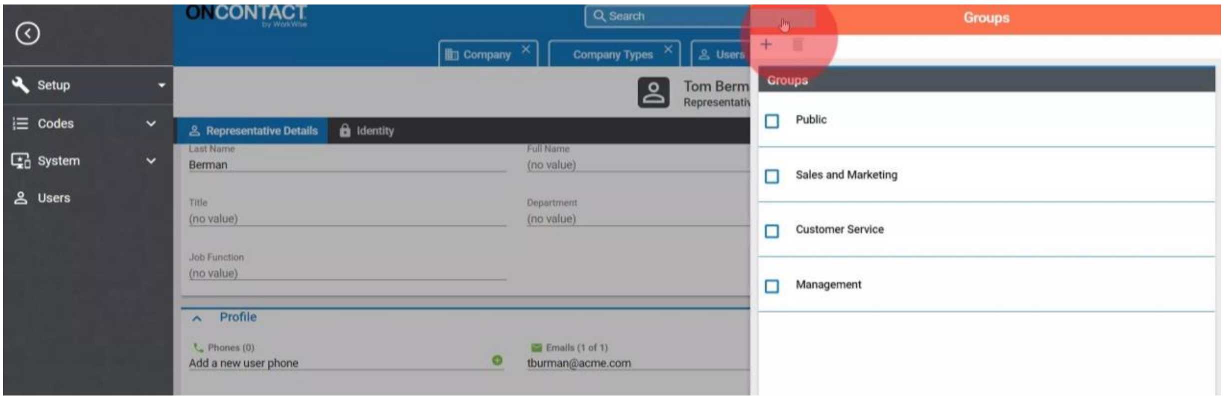
8. All Users MUST be in Public. Additional Groups need to be added. Click the Plus icon.



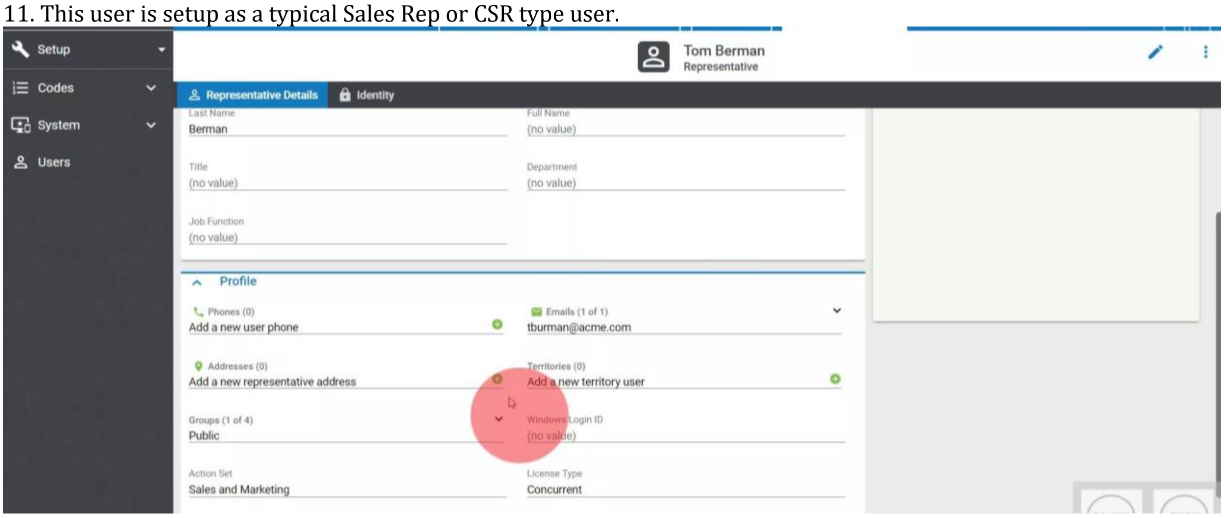
9. Check the Group(s) you want to add and click to Save.



10. Click the arrow to close the card.



11. This user is setup as a typical Sales Rep or CSR type user.



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