SETTINGS

The **Settings** section is the control panel for your account. It allows you to manage your company identity, secure your access, and administer your team members and their specific permissions.

This section is divided into three main tabs: **General**, **Security**, and **Team**.

PART 1: General Settings 🏢

The **General** tab gathers the "base" settings for the workspace: company identity, beta access, language, contact automations, and LinkedIn integration.

1. Company Identity

Define how your organization is visible within the platform:

- **Company logo:** Change the company logo. This is used in the interface and may appear on shared or exported elements depending on the module.
- **Display name:** The public name of the company on the platform. Use the **Edit name** button to rename it .

2. Beta Program

- **Beta Program (Toggle):** Activates early access to new features and improvements.
  - *Note:* Beta features may be unstable or change without prior notice .

3. Language

- **Preferred language of communication:** Use the dropdown menu to select your preferred language for communication .

4. Contacts (Hygiene & Automation)

These settings help keep your database clean automatically.

- **Automatically delete Contacts without associated company:** If active, contacts with no associated company are deleted. *Note: Contacts imported via CSV are NOT deleted by this rule*.

- **Export Contacts email when domain doesn't match Company domain:** If active, the system can automatically export contacts where the email domain differs from the company domain (useful for quality control).
- **Delete non verified emails:** If active, unverified emails are deleted when verification fails to reduce bounce rates and improve quality .

> ⚠️ **Operational Warning:** Before activating automatic deletion options, ensure your team understands the impact, as these changes affect data volume and quality permanently .

5. LinkedIn Integration

Controls the behavior of the LinkedIn integration:

- **Enable LinkedIn conversation sync:** If active, starting a new conversation syncs previous LinkedIn messages to maintain context.
- **Only include contacts from exact company match:** If active, searching for contacts only includes those whose LinkedIn ID matches the target company exactly (higher precision, fewer false positives) .

PART 2: Security Settings 🔒

The **Security** tab focuses on access control to reduce intrusion risks .

1. Password Management

- **Requirement:** The password must be at least **12 characters** long.
- **Change password:** Click this button to replace your current password with a new one .

2. Two-Factor Authentication (2FA)

Adds an extra layer of security to your account.

- **Enable 2FA:** Click this button to start the configuration wizard. The platform will guide you through the steps to complete the setup.
- *Recommendation:* If your team handles sensitive data or shared access, 2FA should be standard practice .

PART 3: Team Management 👥

The **Team** tab is your panel for managing workspace users: viewing license usage, inviting members, assigning roles, and performing quick actions.

Team Capacity

At the top of the list, you will see a counter (e.g., **Team 58/100**). This indicates active users vs. your plan's license limit. If you approach the limit, you must free up users or upgrade your plan .

Search & Navigation

- **Search users:** Filter by name or email. (Shortcut hint: Cmd + F).
- **Pagination:** The list is paginated. You can choose how many records to view (e.g., "Show 25") and navigate using the arrows and indicators (e.g., "1-25 of 58") .

Inviting Users

Opens the flow to invite a new member. He will receive an email with a temporary password and instructions to set up their account and create his user.

User List & Actions

The table displays the following for each member:

- **User:** Name, Avatar, and Email.
- **Role:** Dropdown to assign roles (User or Admin).
- **Impersonate:** A button to log in *as* that user. This simulates their experience and is ideal for support or debugging.
- **Actions Column:** Quick icons for administration (Edit permissions, Change password, Delete user).

Bulk Actions: Use the checkboxes on the left to select multiple users and edit permissions in bulk.

Managing User Permissions

In the **Actions** column, clicking the **Edit permissions** (shield icon) button opens a granular editor with three tabs: **Lists**, **Campaigns**, and **General Settings**.

Lists Permissions

Controls access to data and activity .

- **List Visibility:**
  - *User can view all lists.*
  - *User can only view assigned lists.*
- **Delete Access:**
  - *User can delete records* (contacts, companies, or lists).
  - *User cannot delete any records.*
- **Edit Access:**
  - *User can edit all records.*
  - *User cannot edit any records.*
- **Import Contacts:**
  - *User can import new contacts.*
  - *User cannot import contacts.*
- **Import Companies:**
  - *User can import new companies.*
  - *User cannot import companies.*
- **Export Access:**
  - *User can export contacts or companies.*
  - *User cannot export.*
- **Activity Access:**
  - *User can access all activity.*
  - *User can only access activity they created.*

Campaigns Permissions

Controls outreach capabilities .

- **Campaign Creation:**
  - *User can create and edit campaigns.*
  - *User cannot create or modify campaigns.*
- **Identities Access:**
  - *User has access to all identities.*
  - *User has access to specific identities only.*

General Settings Permissions

Controls configuration and billing .

- **Account Configuration:**
  - *User can access general account settings* (includes billing).
  - *User cannot access general account settings.*
- **Credits Usage:**
  - *User can purchase and consume credits.*
  - *User can only consume credits.*
  - *User can only consume limited credits.*

*Note: Changes are applied by clicking **Save Changes**.*