Updated by: Jess Beattie

Updated: 14/07/2022 9:50:14 am



14 July 2022

Add a gatekeeper to saleslink

PO Box 16 168 16 Branston Street, Hornby Christchurch 8441, New Zealand 03 983 2333 Tel www.TerraCat.co.nz



Add Users in Sales Link	
SL	Click the Users Hyperlink on the module tile you want to provide access to
	Click the Add button
	Search using the first few letters of the surname
Note	If their name doesn't show they have not been added by uptake or accessed the system, send them the link and ask them to notifiy once they've accessed it
SL	Click the Add button
	Select the division they are in and make active
	Click Update
Note	if no add button appears, they are already in the list
To Add Admin Rights	
SL As per the above but tick admin	
Add a Gatekeeper	
SL Executive	COG - Manage Branch Admins
	Add - select the division make active and click ADD
SL Executive	COG - Manage Request Types vs Admin Mapping
SL Executive	Click on hyperlink for each team you wish to add someone to, and then in the bottom right panel click assign to add them to the requests.