Add a user to the Admin or Sales Rep group

This article applies to:

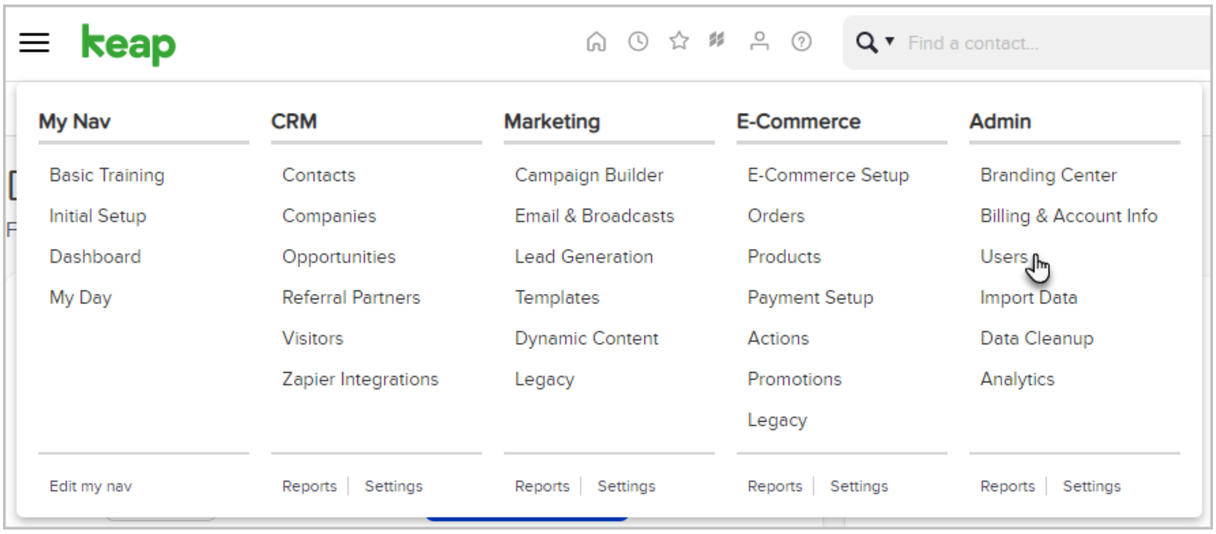
- **Admin:** Users added to this group can access all settings and features in your account with very few restrictions.
- **Sales Rep:** Users added to this group can own opportunity records. Users that are not in the Sales Rep group can view and edit opportunity records, but they cannot own them. In short, any user that is a sales person needs to be in this group!
- The other user groups in Max Classic are Legacy groups and no longer serve a purpose in Keap.

Pro-Tip! Groups are customizable. Example: Opportunity groups can be updated under **CRM> Settings> Opportunity Defaults**. If the default group field is altered and updated, then **Sales Rep** will no longer be associated with this setting. The new group name added to the Opportunity Default field will now replace Sales Rep to allow users to access and edit the Opportunity records.

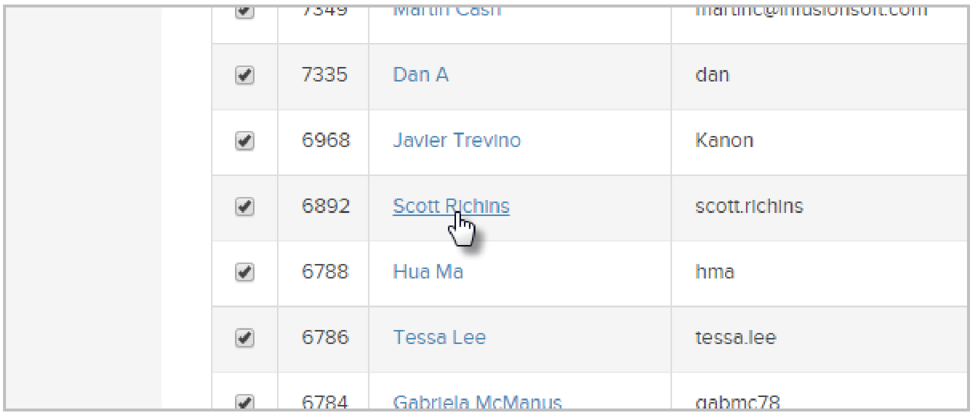
1. Add users the to Admin or Sales Rep groups
2. Remove a user from a user group
3. FAQs

Add users the to Admin or Sales Rep groups

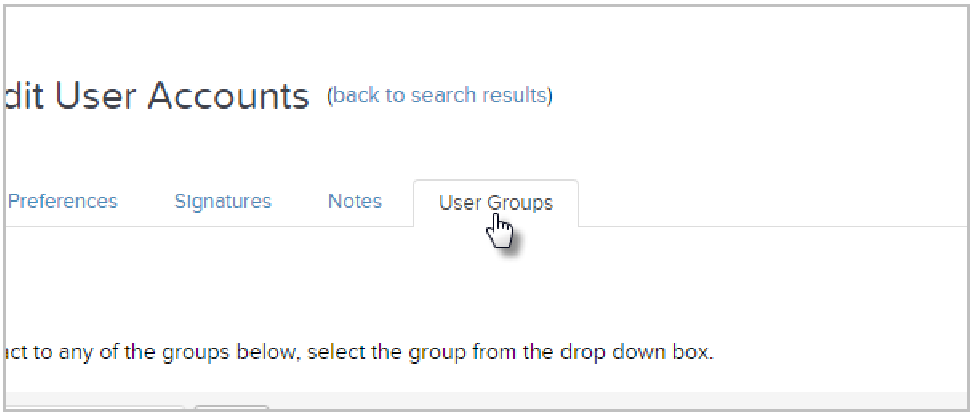
1. Navigate to **Admin > Users**.



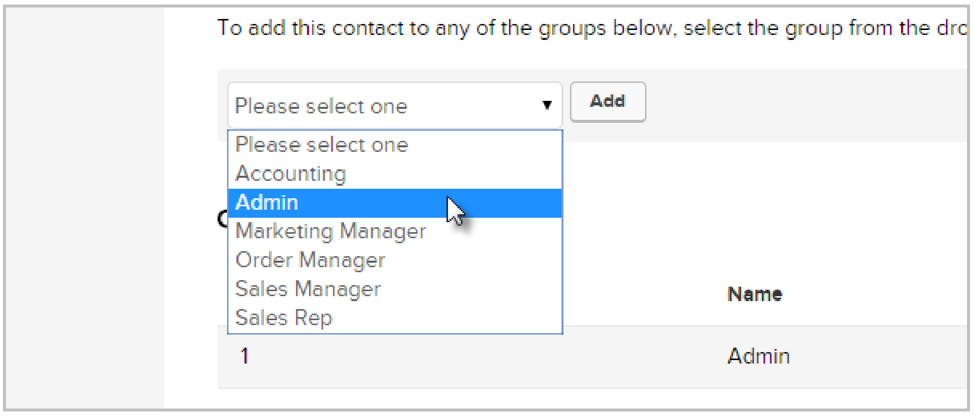
2. Click the name of the user you would like to edit.



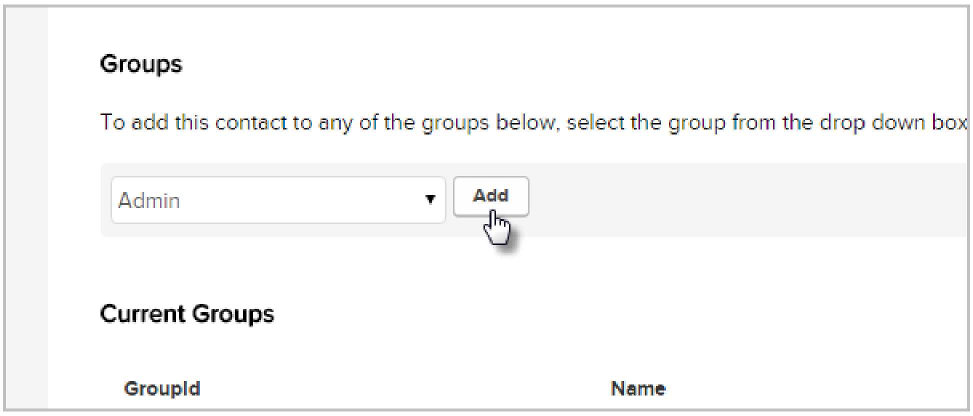
3. Click the **User Groups** tab.



4. Click the **Please select one** drop-down and then select the group to add the user to.

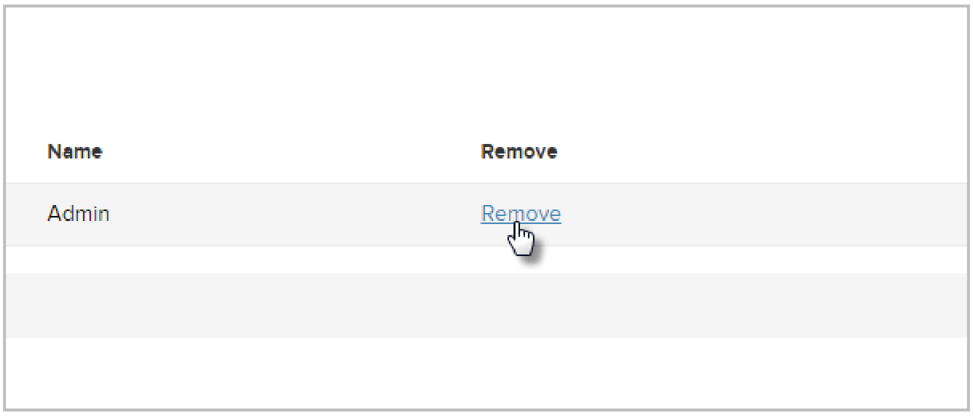


5. Click the **Add** button. Note: Clicking on the **Save** button will not add a user to a group.



Remove a user from a user group

1. Navigate to the user profile under the **User Group** tab as shown above.
2. Click the **Remove** link corresponding with the group to be removed.



FAQs

Can I change the individual permissions of a user in the Admin group?

- To set individual permissions, remove a user from the Admin group and then change the permissions.

What is the use of the other groups (Accounting, Marketing Manager, Order Manager, and Sales Manager)?

- The other user groups in Max Classic are Legacy (retired functionality) groups and no longer serve a purpose in Keap.

My user was added to the Sales Manager group, but he can't own an opportunity. Why?

- By default, only the group **Sales Rep**: enables users to own opportunity records.

Can another group besides "Sales Rep" enable users to own opportunity records?

- Only one group at a time can hold that distinction. By default, it is the Sales Rep group. You can change that if you navigate to CRM > Settings. Click Opportunity Defaults in the navigation menu to the left. Next to Viewing Opportunities, select the group from the drop down that you want to designate as able to own opportunity records. Click Save.