## 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.

ly Nav	CRM	Marketing	E-Commerce	Admin
Basic Training	Contacts	Campaign Builder	E-Commerce Setup	Branding Center
Initial Setup	Companies	Email & Broadcasts	Orders	Billing & Account Info
Dashboard	Opportunities	Lead Generation	Products	Users
My Day	Referral Partners	Templates	Payment Setup	Import Data
	Visitors	Dynamic Content	Actions	Data Cleanup
	Zapier Integrations	Legacy	Promotions	Analytics
			Legacy	

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

	7549	warun Casn	เทลาแกะเยากันราชกรชาและชาก
	7335	Dan A	dan
	6968	Javier Trevino	Kanon
	6892	<u>Scott Richins</u> راس	scott.richins
	6788	Hua Ma	hma
	6786	Tessa Lee	tessa.lee
	6784	Gabriela McManus	aabmc78

3. Click the User Groups tab.

dit User	Accounts	5 (back to	o search results)		
Preferences	Signatures	Notes	User Groups		
ict to any of the	e groups below,	select the	e group from the d	lrop down box.	

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

To add this contact to any o	of the groups belo	ow, select the group from the dro
Please select one	▼ Add	
Please select one Accounting Admin		
Marketing Manager Order Manager Sales Manager		Name
Sales Rep 1		Admin

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

Groups	
To add this contact to any of	the groups below, select the group from the drop down box
Admin	
Current Groups	
GroupId	Name

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.

Name	Remove	
Admin	<u>Remove</u> راس	
	<u>()</u>	

## 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.