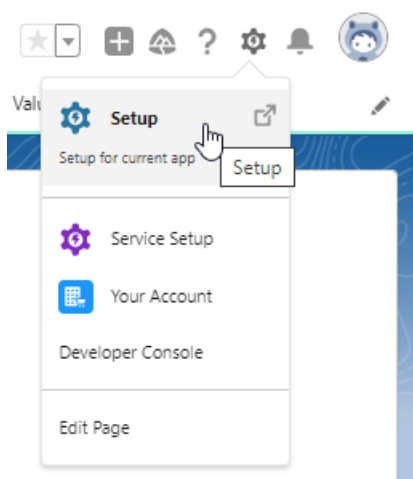


Adding New Users

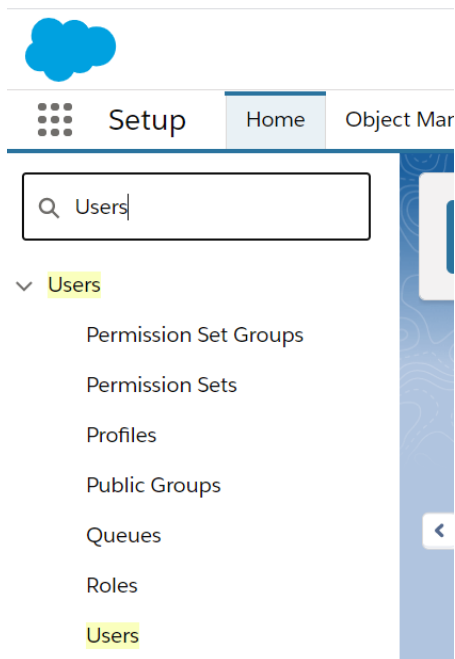
Last Modified on 27/11/2023 12:09 pm GMT

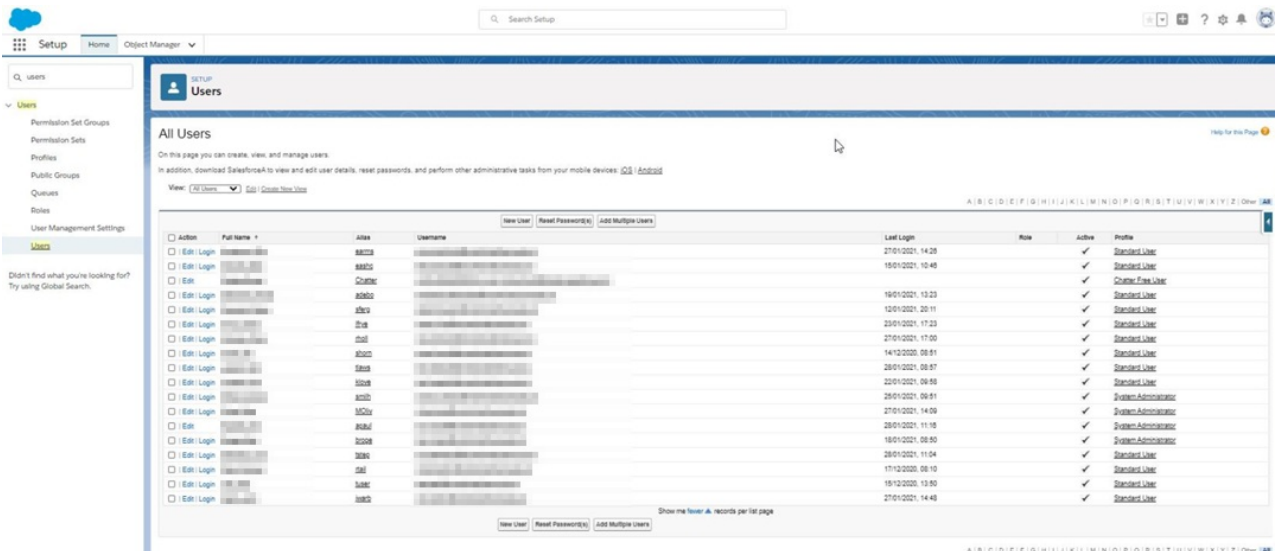
To assign licences, you will have to be an admin user

Navigate to Setup in the top right of the screen:

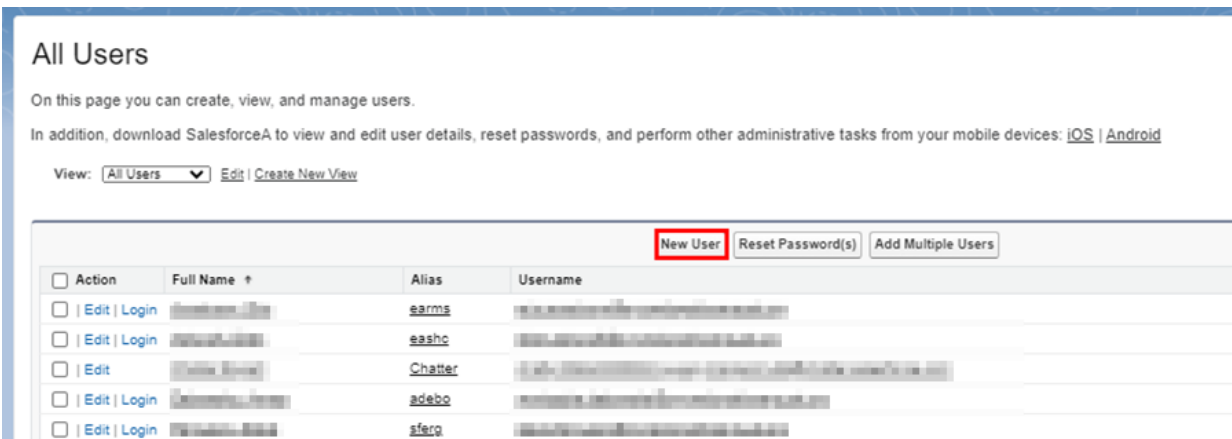


Type 'users' in quick find box on the top left of the screen. In the Users list, select 'Users'



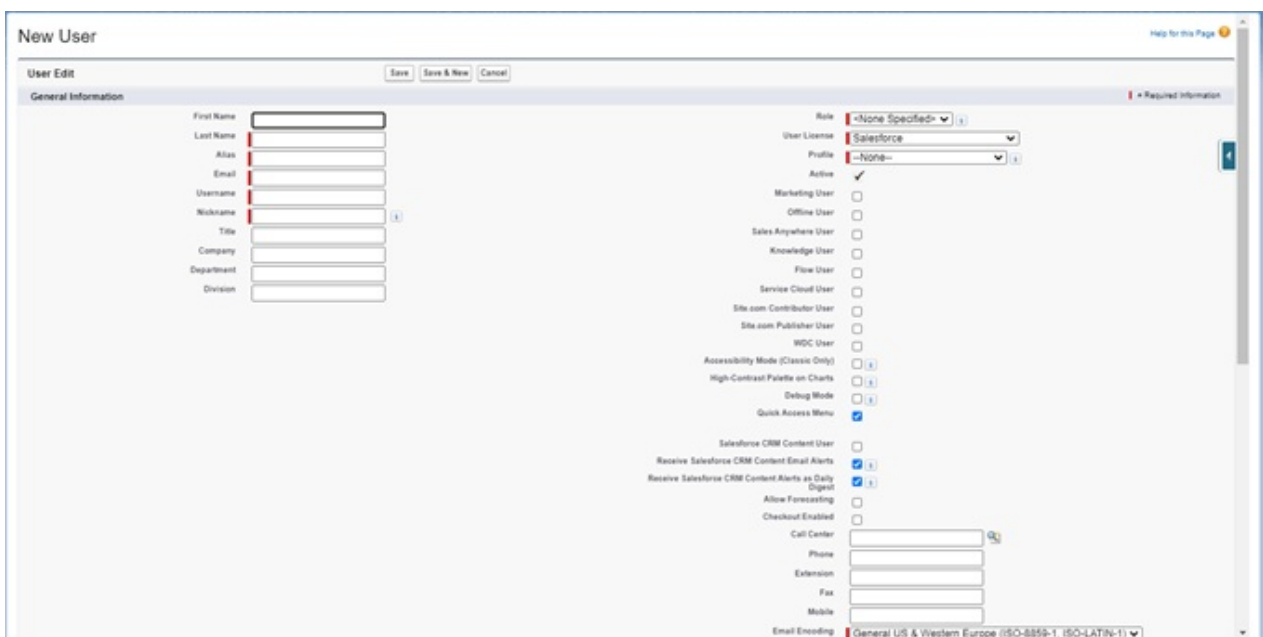


If you would like to add one new user - Click on 'New User'.



Fill in the details for the new user and they will receive an invite to sign up to Synaptic Pathways.

Enter the red required information (username will need to be unique), the User Licence should be set as 'Salesforce' and Profile as either Standard User or System Administrator.



The screenshot shows the 'User Edit' interface. On the left, there are input fields for 'First Name', 'Last Name', 'Alias', 'Email', 'Username', 'Nickname', 'Title', 'Company', 'Department', and 'Division'. On the right, there are dropdown menus for 'Role' (set to '<None Specified>') and 'User License' (set to 'Salesforce'). The 'Profile' dropdown is open, with 'Standard User' selected. Below the dropdowns, there are several checkboxes: 'Active' (checked), 'Marketing User', 'Offline User', 'Sales Anywhere User', 'Knowledge User', 'Flow User' (checked), 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', 'WDC User', 'Accessibility Mode (Classic Only)', 'High-Contrast Palette on Charts', 'Debug Mode', and 'Quick Access Menu' (checked).

Flow User will also need to be selected:

This screenshot shows the 'User Edit' form with the 'Profile' dropdown set to 'Standard User'. The 'Flow User' checkbox is checked and highlighted with a red box. Other checkboxes include 'Active' (checked), 'Marketing User', 'Offline User', 'Sales Anywhere User', 'Knowledge User', 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', 'WDC User', 'Accessibility Mode (Classic Only)', 'High-Contrast Palette on Charts', 'Debug Mode', and 'Quick Access Menu' (checked).

Once these options have been completed, ignore all other fields and 'Save'.

Selected 'Save & New' if you would like to save the user you've just created and add another user.