HEART fibre CRM

OF THE PRACTICE

Visit support.fibrecrm.com for more info or contact your CRM Manager

Creating a New User in CRM

Navigate to your user • name in the top right hand corner and then select Admin.



In the Admin section, scroll down to Users and then select User Management.



Enter the required information for the new user including: **User 4** • Name, Last Name, Status and User Type. For Username keep the same format as other users.

CREATE			
SAVE AND CLOSE SAVE CAN	CEL RESET USER PREFERENCES RESET HOMEPAGE		Indicates required field
User Profile Password Advanced Layou	It Options Smart search API		
USER PROFILE			-
Username:*		First Name:	
Status:*	Active	Last Name:*	
User Type:	Regular User		
Block Login:			
S2FA Authentication:			

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IM Type:

You can also fill in more Employee Information below such as **Job Title**, Phone and Address if required.

CANCEL RESET U	SER PREFERENCES RESET HOMEPAGE	
User Profile Adv	anced Access ACTIONS -	
Full Name:	Victoria Mills	
Status:	Active	
Photo:		
Block Login:		
EMPLOYEE INFORMATION		
A ROLES		