On boarding and Off boarding for User(s)

ON ● On Boarding: Creating the New User

1. Go to TOOLS > ADMINISTRATOR > MANAGE USERS and Click *"New User"*

2. Add First name, Last name, and email address, user name and password

3. Click on the user name you created in the list of *"active users"*

4. Adjust user type as necessary:

   (Normal is your typical user, most organization ignore the Limit contact assess Section)

5. Click on Tab Access: Non manager Tab access is as followed:

   a. Today, Tasks, Calendar, Email, Marketing, Reports, Occupancy, Tools, and Help *(Managers have access to the interactive Dashboard)*

6. The System generates a Welcome email sent directly to the email address of the New User, prompting them to Log In and update their personal User Account details in their Contact Record: (mailing address, phone and location if appropriate)

7. Advantage Anywhere launches the Specific New User(s) Campaign with links to the recommended | approved training and support.

*All New Users will receive the Bi-Monthly Live-On line training details via email.

Contact support if assistance is needed: support@advantaeganywhere.com

1. Go to TOOLS > ADMINISTRATOR > MANAGE USERS: Locate the user and click on their name in the list to edit, click "Archive" on the pop up. (DO NOT DELETE)

   Note: Archiving a user immediately terminates any access using that log in, resetting the password through the 'Forgot Password' link is disabled and kicks out anyone currently logged in under these credentials/this user account.

2. While still on the "Edit User" pop up, Click on: "Open User Contact Record" at the top. Once user record opens, Click Edit and change their category to "Former Staff."

3. To Reassign contacts, view upcoming scheduled appointments and tasks from the past user: Go to TOOLS > ADMINISTRATOR > MANAGE USERS: View the link(s) available at the top right.

   a. **Contacts by category:** (Must select the former staff member) this report pulls a list of contacts by category. You can now reassign segments to a new Account Executive. Determine the desired category and click on the former staffs count. Once the list of contact names is visible use the contact tools dropdown to reassign to new Account Executive.

   b. New Assigned Account Executive can use the report called **"Task Detail Report"** to view all outstanding tasks for the Former Account Executive. (Admins can run this for their own use from TOOLS > ADMINISTRATOR > MANAGE USERS page.)

   c. **Scheduled appointments by date:** Select to view all upcoming appointments for the Former Account Executive. (Admins can run this for their own use from TOOLS > ADMINISTRATOR > MANAGE USERS page.)

4. Remove Former Staff from any Scheduled Report

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Need assistance: Simply click on **HELP** located on the left navigational menu:

Education Center | Knowledge Base:

- Search – Knowledge Base by Topic, Issue or Keyword
- FAQ's – Built based on questions from your peers
- Watch – Short Instructional Videos or Full Training Sessions

Self-Guided Education:

- **Pre-Approved New User Training:** *Password Protected*
  This recorded training session is approximately 75 minutes and broken down into 3 separate Videos

- **Advantage Anywhere Academy:** Dive into Advantage Anywhere Academy and learn how to use the tools at your fingertips
    - Broken into 3 learning levels

- **Information Bubbles:** Locate the ⓘ at the top right of your page. Here you will find specific details | video how to navigate the page you are on.

Live on-line Training:

- **Bi Monthly *Live on line Training*:** Twice a month we have live on line training based on important topics.
    - Dive into training with your peers
    - Have the opportunity to ask any questions you have in real time to a real person.

On Going Support:

- **Help Desk Support:** Search Help in your data base, we are in there!
    - Phone: 239.337.2667
    - Email: support@advantageanywhere.com

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