OnContact Groups

Contents

Overview

Each OnContact User is assigned to one or more Groups. These groups control what functions are available for that user, and allow you to establish various levels of permissions and access throughout the system.

Activity records also use Groups to control the set of Activities that will be available to a User. So, for example, if you have an Activity called Send Quote, you may only want your Sales Reps and Administrators to be able to create that kind of Activity. You may not want your Accounting or Customer Service Reps to have access to this Activity.

The following Groups are provided for your use. You can also add your own Groups if desired:

Group Name	Description	Can Access:	Specific Controls/Access
Administration	Designed for OnContact system Administrators, this group allows access to the OnContact Setup controls.	Workspace Marketing Reports Knowledge Setup System	Members of this group can modify the database, maintain Users, import files, and maintain templates. These users have full access to all areas of OnContact except for System maintenance.
Contact Center	Allows access to Customer Service Queues and Scripts	Contact Center Knowledge	Allows access to the Contact Center and Knowledge Base.
Contact Center Manager	Allows access to Customer Service Queues and Scripts	Contact Center Workspace Knowledge Reports Setup	Allows access to Workspace and Customer Service functions. Has Admin privileges and can maintain the database, users, etc. Also can run reports and maintain Knowledge Base Articles and Call Scripts.
CTI	Allows user to use phone integration.	N/A	Members of this group can use the integration phone functions you use telephony.
Customer Service	Allows full access to all areas, without Admin functions.	Workspace Marketing Reports Knowledge	Allows full access to all areas, without Admin functions.
Disable Delete on Main Entities	Members of this group are restricted from deleting Company, Contact, Opportunity, Incident or Activity records.	N/A	Members of this group are restricted from deleting Company, Contact, Opportunity, Incident or Activity records.
**Public **Note: All Users are assigned to this Group	A generic group with full access to all but the Administrator functions.	Workspace Marketing Reports Knowledge	A generic group with full access to all but the Administrator functions.
Sales and Marketing	A generic group with full access to all but the Administrator functions.	Workspace Marketing Reports Knowledge	A generic group with full access to all but the Administrator functions.
Setup and Maintenance	Complete access to all functions and areas of OnContact	Workspace Marketing Reports	Complete access to all functions and areas of OnContact

		Knowledge Setup System	

Setting Up Users and Applying Groups to Control Access and Permissions

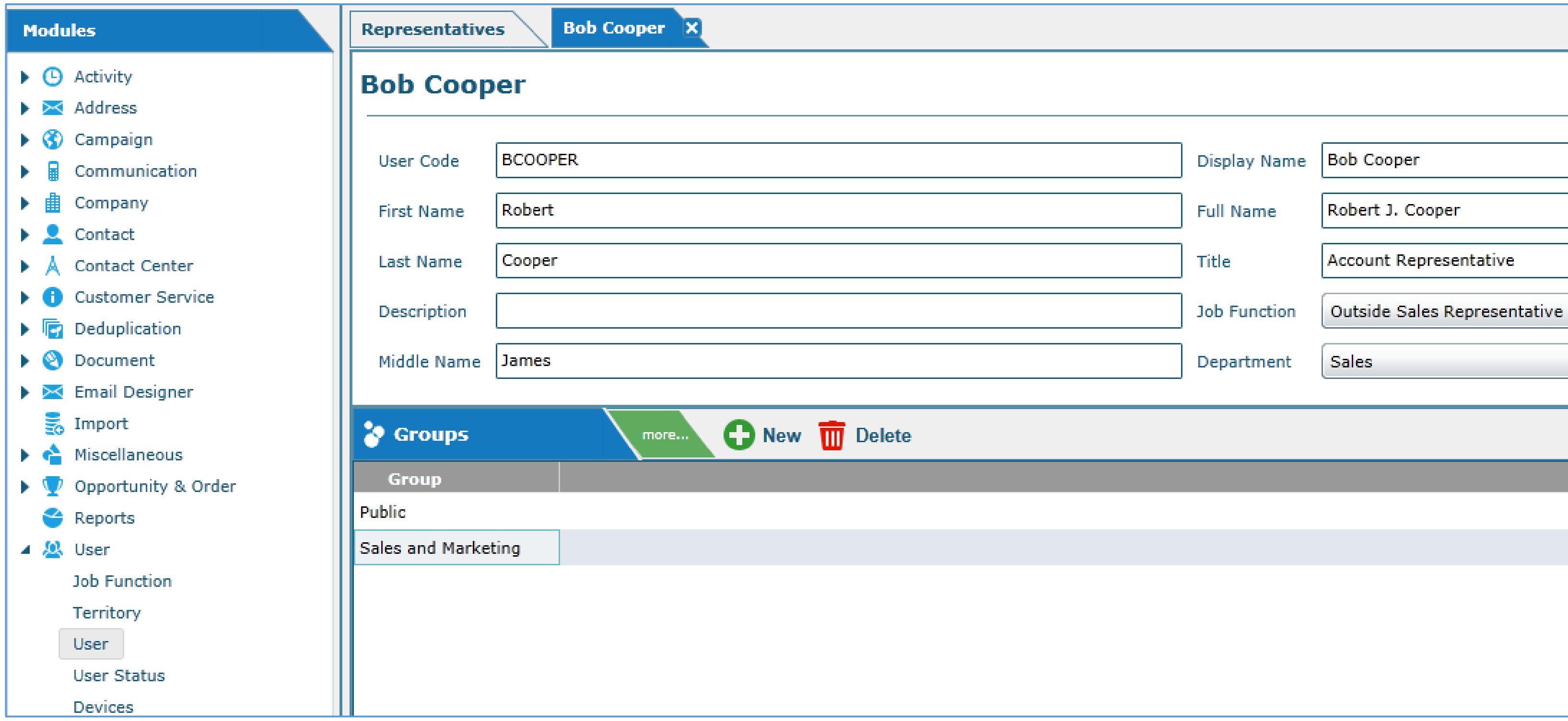
When a User is added to OnContact, part of the process in setting up the User's record is to identify the Groups they belong to. Let's look at some common examples.

Note: All Users should be added to the Group called 'Public' –and, add one or more additional groups to further control the User as needed.

Example 1: Sales Rep

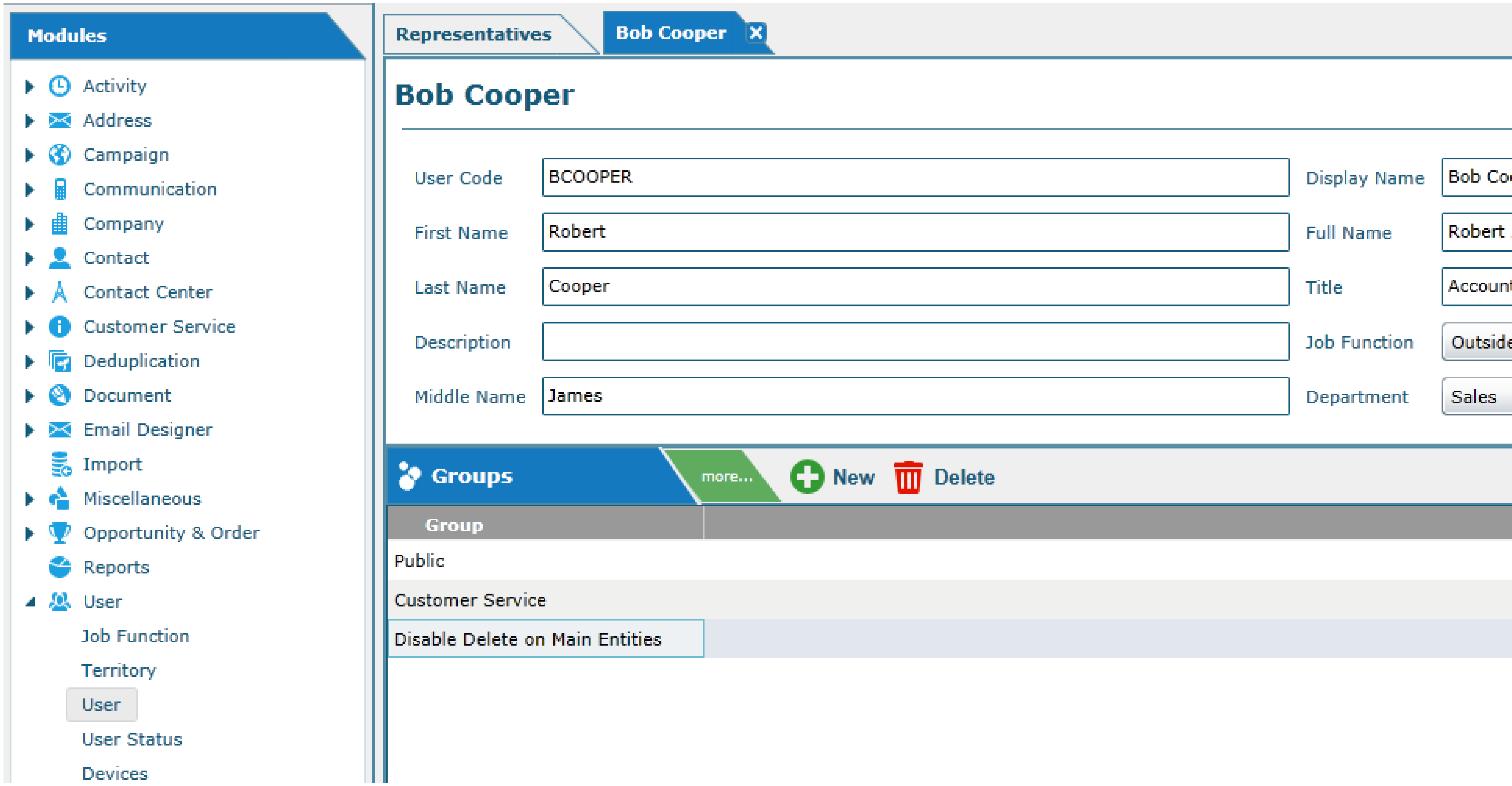
1. Go to Setup>User>User
2. Open the User record and select the Groups tab.
3. Click New.
4. Click in the first row and select Public.
5. Click New.
6. Click in the second row and select Sales and Marketing

7. Save and Close the User record.



Example 2: Customer Service Rep – Cannot delete records

1. Go to Setup>User>User
2. Open the User record and select the Groups tab.
3. Click New.
4. Click in the first row and select Public.
5. Click New.
6. Click in the second row and select Customer Service
7. Click New.
8. Click in the third row and select Disable Delete on Main Entities.
9. Save and close the User record.



Modules
Activity
Address
Campaign
Communication
Company
Contact
Contact Center
Customer Service
Deduplication
Document
Email Designer
Import
Miscellaneous
Opportunity & Order
Reports
User
Job Function
Territory
User
User Status
Devices
Representatives
Bob Cooper
Bob Cooper
User Code
BCOOPER
Display Name
First Name
Robert
Full Name
Last Name
Cooper
Title
Description
Job Function
Middle Name
James
Department
Sales
Groups
more...
New
Delete
Group
Public
Customer Service
Disable Delete on Main Entities