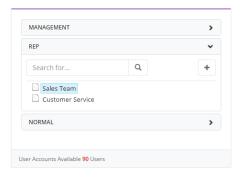# Moffice CRM: CRM User and Rep Setup

Introduction

Not everyone in your company who uses MofficeSuite needs CRM. Normal users can enjoy Collaboration, Mail, CloudDisk, etc. menus for collaborative workplace functionality without needing to be a part of the sales cycle. For those staff who need CRM however, you'll have to add them separately as CRM users through another menu in the administrator (postmaster) account after setting up your business' organization chart with the desired MofficeSuite users.
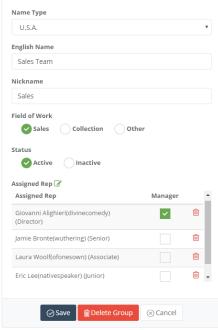
CRM User Settings

CRM Users are all divided into groups that are dependent on their function in an organization. There are three groups: Management, Rep, and Normal. Though group names are somewhat self-explanatory, below is a table further explaining who needs to go in which group.

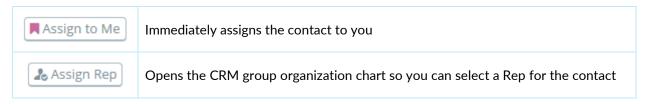| Group Name	What Kind of Users Should Be Added?
Management	For employees with managerial or administrative functions • Can view more menus and options compared to Rep & Normal users
Rep	For representatives in Sales / Customer Service / Technical Help teams
Normal	For other miscellaneous users who need access to CRM data (i.e. Marketing)

To add Groups, log into your admin (postmaster) account and go to Organization > Register CRM Users. From here, pick a tab with a CRM group, add teams, then add assigned Reps. After selecting a manager and saving the information, you'll be able to use the created teams further in Moffice CRM.
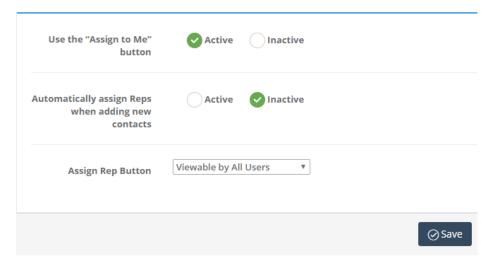
CRM Rep Settings

After setting up CRM users, next you'll want to decide how to handle assigned Rep settings. When assigning Reps, there are two main buttons you'll want to control: the "Assign to Me" button and the "Assign Rep" button.

Assign to Me	Immediately assigns the contact to you
Assign Rep	Opens the CRM group organization chart so you can select a Rep for the contact

First, for each contact (Customer, Potential, Lead, or Account), you can decide if you want to add an "Assign to Me" button. For companies that promote a more relaxed sales Rep policy, using the button and making it viewable for all users can quickly get people involved in the contacts and offer more collaborative opportunities. For companies that utilize a stricter sales Rep policy with heavy commissioned-based payment, it may be more prudent to disable the "Assign to Me" button and provide managers only permission to use the "Assign Rep" button.

Second, you can select to automatically have new contacts be assigned to the Rep who inputs their data into the system. It's a handy option that streamlines Rep assignment for busy managers/Reps.

Finally, for the "Assign Rep" button, you can select to make it viewable to all users or selected users. To make assigning Reps more selective, make the "Assign Rep" button viewable to only selected managers.