



# Administrator Training

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## Logging into the Support Manager

In your browser (preferably you will use Firefox or Internet Explorer) go to:

[www.ebsuite.com/iLogin.jsp](http://www.ebsuite.com/iLogin.jsp)

The screenshot shows the EBSuite website's navigation menu and the Account Login form. The navigation menu includes Home, Solutions, How to Buy, Customer Success, About Us, Demo, and Customer Login. The Account Login form prompts the user to enter their Company Name, User Name, and Password. It includes a Login button, a Remember me checkbox, and links for Forgot Password, Mobile Login, Secure Login, and Register for a free trial. The footer contains contact information: 1.888.CRM.EBS0 or 1.888.276.3270 | Contact: sales@ebsuite.com, Copyright © 2001 — 2007 EBSuite.com, All rights reserved. CRM Service Statement | Privacy Policy.

## The Administrator Role

All Users will login to the Main Page. As the Admin User, make sure your are in the Administrator Role by checking Preferences. Then review the other Users who have access.

1st - Check Your Preferences

See existing Users

The screenshot shows the Alcatel-Lucent Customer Support main page. The 'Account' menu is open, highlighting 'User Administration'. A callout box points to the 'Preferences' link in the top right. Another callout box points to the 'User Administration' menu item. The page includes a navigation bar, a search bar, and several data tables for knowledge, cases, and contacts.

In the Preferences area a User with multiple roles may switch roles.

Must be in an Administrator Role to manage other Users

Switch roles if necessary and Submit at the bottom of the page

The screenshot shows the 'Personal Preferences' page. The 'Switch Roles' dropdown menu is open, showing options: Support Administrator, Agent Administrator, HRIC AGENT, Global Admin, and Support Administrator. A callout box points to the 'Support Administrator' option. Another callout box points to the bottom of the page, indicating where to click 'Submit'. The page includes fields for personal information and user interface settings.

## Managing Users

In the Administrative Role the User may manage the application Users (Account > User Administration)

Welcome Admin User. [October 1, 10:26am] | Tip: Email Template: PDF Form Merge | App Mo

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Main Organization Contact Case Knowledge External Site Live Service Tool Calendar Task **Account**

Reminder & Alert: Case 2002 Reminder

**User Management**  
Turn On/Off Explanations

Search

<i>Username</i>	<i>First Name</i>	<i>Last Name</i>	<i>Display Name</i>	<i>E-Mail</i>
<a href="#">BAgent</a>	Bill	Agent	Bill Agent	pbaldwin@ebsuite.com
<a href="#">SAgent</a>	Susan	Agent	Sue Agent	baldwin.philip@gmail.com
<a href="#">admin</a>	Admin	User	Admin User	nzhong@ebsuite.com

Click on italic headers to sort.

Create New

**User Group Management**

[All](#)

New Group

Click to Edit the individual User profile

Setting up a Group and including Users is mandatory to maintain User access rules

## Editing an Existing User

Click the Username to open the User profile (in this example BAgent)

Welcome Admin User. [October 7, 06:33am] | [Tips: DB Integrity: Merge duplicates](#) | [Preferences](#)

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**User Detail: BAgent**

Username: <b>BAgent</b>	Display Name: Bill Agent
First Name: Bill	Last Name: Agent
Middle Name:	Color Code: ■
E-Mail: pbaldwin@ebsuite.com	Phone:
Title:	Territory Role:
Function / Responsibility:	Manager:
Branch/Division:	

[Edit User](#) | [Edit Roles](#) | [Change Manager](#) | [Delete User](#)

**User Groups**

All
-----

Edit User – all information about the individual user including their login name.

Edit Roles – Important – see Setting User Roles below.

Change Manager – Not used, not administration is required.

Delete User – Important – see Deleting a User below.

## User Passwords

User Passwords are not managed by the Administrator. The User manages their own password in the Preferences area. If they are locked out of the application, they will have to request their password be sent to them at the login screen.

\*\*\*insert picture of login screen\*\*\*

## Adding the Roles to a User

Click on Edit Roles to add a Role for a User. A User may have more than one Role assigned, but must have at least one role assigned before that User may log in. The administrator may also take Roles away from a User, but if no Role is assigned the User will not be able to log in.

**Configure User Roles**

Please specify roles for this user. You can configure or remove roles for a user provided that you have enough licenses. (Multiple roles for a user count as one license.) In the '# Licenses' field, the number of licenses you have for a given application is the licenses you have already allocated, not counting the current user.

**User: Sue Agent**

Application	# Licenses	Role	Default Role
Sales Application(SALES)	10 / 1	<input type="text"/>	<input type="text"/>
Customer Support - HelpDesk(SUPPORT)	10 / 2	Agent Administrator, KNOWLEDGE	HRIC AGENT
Marketing Automation(MKT)	10 / 1	<input type="text"/>	<input type="text"/>
Project Management(PROJECT)	10 / 1	<input type="text"/>	<input type="text"/>
Time & Invoice(TIB)	10 / 0	<input type="text"/>	<input type="text"/>
Package: All(PKGALL)	10 / 1	<input type="text"/>	<input type="text"/>
Package: Sales / Marketing / Project(PKGSMP)	10 / 1	<input type="text"/>	<input type="text"/>
Package: Helpdesk / Project / Billing(PKGHPT)	10 / 1	<input type="text"/>	<input type="text"/>

Default Login Application:

## Deleting a User (Making the User Inactive)

Before a User can be deleted, all of the Roles assigned to the User must be removed. Once the Roles are removed the User cannot login. In the application Users are never truly deleted, they are only made Inactive even though the "Delete User" button implies otherwise.

Once a User is stripped of their Roles and the Delete User button is submitted, the User and all pertinent information is moved to the Inactive User area under User Management.

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Record Updated Successfully.

6 Reminder & Alert: Case 2004 Reminder

User Management View By

Turn On/Off Explanations

Search

Username	First Name	Last Name	Display Name	E-Mail
<a href="#">S.Agent</a>	Susan	Agent	Sue Agent	beldwin.philip@gmail.com
<a href="#">admin</a>	Admin	User	Admin User	nzhong@ebsuite.com

Click on italic headers to sort.

Create New

**Inactive Users**  
The following (inactive) users may not have been assigned a valid role. Please click on the links to assign user roles to them, before they can login to the application.

[Bill Agent](#)

User Group Management

All

New Group

To reverse the process (re-establish a deleted user) simply add a Role back to the Inactive User.

## Controlling Case Access (visibility)

All users must belong to a common group. Under User Management the administrator can see the existing Group

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Record Updated Successfully.

6 Reminder & Alert: Case 2004 Reminder

User Management View By

Turn On/Off Explanations

Search

Username	First Name	Last Name	Display Name	E-Mail
<a href="#">S.Agent</a>	Susan	Agent	Sue Agent	beldwin.philip@gmail.com
<a href="#">admin</a>	Admin	User	Admin User	nzhong@ebsuite.com

Click on italic headers to sort.

Create New

**Inactive Users**  
The following (inactive) users may not have been assigned a valid role. Please click on the links to assign user roles to them, before they can login to the application.

[Bill Agent](#)

User Group Management

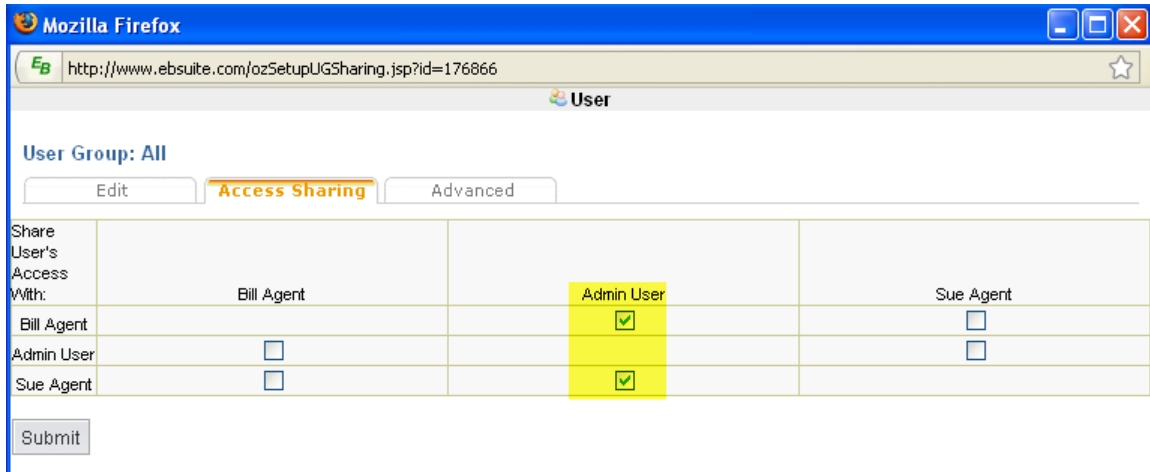
All

New Group

The Group name is: All  
Click on the "All" group

The group members are managed under the Edit tab and Access Sharing tab controls (as the name implies) access sharing. Access is the ability of one user to see the Cases of another User.

Notice the Users in the on going example where Sue Agent and Bill Agent are HRSC Agents and Admin is the Administrator with total visibility of all cases.



Admin User can see Bill Agent and Sue Agent's respective Cases, but Bill and Sue can only see their own cases.

The Advanced tab can be ignored.

## ***Administrative Access to System Preferences***

All Users have access to their own local Preferences. In general the Users should be discouraged from making any changes to their Preferences with out a discussion with the Administrator for the site. But, an important feature inside the Preferences is the ability the User has to change their login password. In fact, this is only place User passwords are administered. The site Administrator does not have any utility or tool that enables passwords to be reset. Only the User controls their own password.

Users may reset their password here

Preferences

6 Reminder & Alert - Case 2002 Reminder

Personal Preferences: **General / UI** | [Calendar Task](#) | [CRM](#) | [External Profile](#) | [All / List View](#)

**Personal Info**

Display Name:	<input type="text" value="Admin User"/>				
First Name:	<input type="text" value="Admin"/>	MI:	<input type="text"/>	Last Name:	<input type="text" value="User"/>
Email:	<input type="text" value="rzhong@bellu.com"/>				
Phone:	<input type="text"/>				
Old Password:	<input type="password"/>				
New Password:	<input type="password"/>				
Retype New Password:	<input type="password"/>				
Switch Roles:	<input type="text" value="Support Administrator"/>				

Administrators may switch roles - Agent Users will only have one role

**User Interface**

Time Zone:	<input type="text" value="GMT-08:00 US/Canada/Pacific"/>
Language:	<input type="text" value="English"/>
Session Inactivity Timeout:	<input type="text" value="Never Timeout"/>
Flash Chart:	<input type="text" value="Yes-with animation"/>
Side Bar:	<input checked="" type="radio"/> Enable <input type="radio"/> Disable
User Selection:	<input type="radio"/> Popup Window <input checked="" type="radio"/> Dropdown Menu
Display Log Entries:	<input checked="" type="radio"/> Descending <input type="radio"/> Ascending
Table: # of Lines Per Page:	<input type="text" value="20"/>
# of Extra Lines:	<input type="text" value="5"/>

**Other** | Please note that the links in this section will navigate away from this page. Please submit your changes first.

## Adjusting the personal filter choices

At the top of the Cases tabular display (the table seen after clicking on the Cases tab) look for the “slanting pencil” to adjust the personal filter.

The screenshot shows a web application interface for support cases. At the top, there is a navigation bar with 'App Module: Support' and various utility icons like 'Preferences', 'Email', 'File', 'Help', and 'Logout'. Below this is a search bar. The main content area features a table of cases with columns for 'Assigned To', 'Open Cases', 'Status', and 'Priority'. A red box highlights a slanting pencil icon in the top right corner of the table, with a red arrow pointing to it and the text 'click the slanting pencil to adjust the choices'. Below the table, there are several filter options: 'Assigned To: All Users', 'Open Cases', 'Status: All', and 'Priority: All'. The table itself has columns for 'Created By', 'Problem Code', 'Problem Desc', 'Creation Date', 'Reminder', 'Last Update Date', 'Resolution Code', and 'TransX'. The first row shows a case assigned to 'n User' with the problem code 'Help Req'd w/ Tool' and a description 'The instructions don't match the display'.

## Support

The screenshot shows a 'Support' account setup page. At the top, there is a navigation bar with 'Knowledge', 'External Site', 'Live Service', 'Tool', 'Calendar', 'Task', and 'Account'. Below this is a search bar. The main content area features a 'Setup For: Company-Wide Setup' dropdown. A table lists filter options with 'Show Filter' and 'Default' columns. The first four options are checked: 'Assigned To' (All Users), 'Open Cases' (Open Cases), 'Status' (All), and 'Priority' (All). The last three options are unchecked: 'Period', 'Created By', and 'Last Updated By'. A red box highlights the 'Disallow user level customization' checkbox, which is checked. A red arrow points from a callout box to this checkbox. Another callout box points to the filter options table with the text 'Pick the Sort choices to display'. A 'Submit' button is at the bottom.

Pick the Sort choices to display

Users probably do not need access to these choices

Show Filter	Default
<input checked="" type="checkbox"/>	Assigned To: All Users
<input checked="" type="checkbox"/>	Open Cases: Open Cases
<input checked="" type="checkbox"/>	Status: All
<input checked="" type="checkbox"/>	Priority: All
<input type="checkbox"/>	Period
<input type="checkbox"/>	Created By
<input type="checkbox"/>	Last Updated By

Disallow user level customization

Submit

## Searching for Duplicate Employees

If it appears that the database has duplicate entries for an Employee record, the administrator can search the database for those duplicates and merge records.

Welcome Admin User. [October 6, 15:26pm] | | [Tips: DB](#)

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6 Reminder & Alert: Case 2010

Latest Knowledges

**Knowledge**

- [Borrowing from the 401K plan](#)
- [Employee wants to arrange](#)

More... + New

Recent Items

Maria Sha	2008	Camillo V
2010	2004	Mike Kurl
Carlos Sa	2003	Chris Sha
2014	2002	2006

Quick Search Search by keyword

Summary  
New  
Views  
Reports  
Lists  
By Product  
**Search**

Go to the search area

Find the suspected duplicates by searching. Search for example by last name.

Welcome Admin User. [October 6, 15:29pm] | | [Tips: QUICK ADD ToDos, Applets, and Notes](#)

App Module: Support

Preferences Email File Help Logout

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6 Reminder & Alert: Case 2010 Reminder

Advanced Search:  
[Turn On/Off Explanations](#)


Special Searches | Saved Searches | Recent Searches

- [Sync List](#)
- [Search Contact By Opportunity](#)
- [Custom Field Value / Period](#)
- [Search Contact by Note](#)
- [Search Contact by Product](#)
- [Campaign Process](#)
- [Search Contact by Organization](#)
- [Search Contact by Assets](#)

Search Criteria:

Display Name: <input type="text"/>	Contact Number: <input type="text"/>
First Name: <input type="text"/>	Last Name: Equals <input type="text" value="lewis"/>
Phone: <input type="text"/>	Email: <input type="text"/>
Address Line 1: <input type="text"/>	Address Line 2: <input type="text"/>
City: <input type="text"/>	State: <input type="text"/>
Postal Code: <input type="text"/>	Country: <input type="text"/> <input type="button" value="Go"/>
Classification: <input type="text"/> <input type="button" value="Go"/>	Title: <input type="text"/> <input type="button" value="Go"/>
URL: <input type="text"/>	Net Worth: <input type="text"/>
Department: <input type="text"/>	Sex: <input type="text"/>

Search by last name


96870

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[Home](#) [Organization](#) **Contact** [Case](#) [Knowledge](#) [External Site](#) [Live Service](#) [Tool](#) [Calendar](#) [Task](#) [Account](#)

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**Advanced Search:**  
[Turn On/Off Explanations](#)

**Special Searches:** [Saved Searches](#) [Recent Searches](#)

- [Sync List](#)
- [Search Contact By Opportunity](#)
- [Custom Field Value / Period](#)
- [Search Contact by Note](#)
- [Search Contact by Product](#)
- [Campaign Process](#)
- [Search Contact by Organization](#)
- [Search Contact by Assets](#)

**Search Criteria:** [ Last Name Equals lewis ]

**Search Result:**

<input checked="" type="checkbox"/>	#	Contact Name	Email	Last Name
<input checked="" type="checkbox"/>	2144988463	<a href="#">Emanuel Lewis</a>	<a href="mailto:gbaldwin@ebusuite.com">gbaldwin@ebusuite.com</a>	Lewis
<input checked="" type="checkbox"/>	2144919675	<a href="#">Emanuel Lewis</a>	<a href="mailto:gbaldwin@ebusuite.com">gbaldwin@ebusuite.com</a>	Lewis

For Selected Entities: [Batch Team Assign](#) [Team Add](#) **Update Value** [Mark For Sync](#) [Mail Merge](#) [Print](#)

[Print Report](#) [Create New](#) [Back To Summary](#)

Choose duplicate suspects (Callout box pointing to the two rows in the table)  
 Update the value (Callout box pointing to the Update Value button)

After clicking on Update Value, look for “Merge Duplicate Records”

Content:

- Batch Create Opportunity
- Batch Create Task
- Merge Duplicate Records
- Send Request to update Contact Information
- Attach Drip Campaign

Merge Duplicate Records (Callout box pointing to the checked option)  
 Submit/Cancel (Callout box pointing to the buttons)

This will merge the data from both records, keeping the most recently updated information.