OnContact Groups

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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:

<table>
<thead>
<tr>
<th>Group Name</th>
<th>Description</th>
<th>Can Access:</th>
<th>Specific Controls/Access</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administration</td>
<td>Designed for OnContact system Administrators, this group allows access to the OnContact Setup controls.</td>
<td>Workspace Marketing Reports Knowledge Setup System</td>
<td>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.</td>
</tr>
<tr>
<td>Contact Center</td>
<td>Allows access to Customer Service Queues and Scripts</td>
<td>Contact Center Knowledge</td>
<td>Allows access to the Contact Center and Knowledge Base.</td>
</tr>
<tr>
<td>Contact Center Manager</td>
<td>Allows access to Customer Service Queues and Scripts</td>
<td>Contact Center Knowledge</td>
<td>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.</td>
</tr>
<tr>
<td>CTI</td>
<td>Allows user to use phone integration.</td>
<td>N/A</td>
<td>Members of this group can use the integration phone functions you use telephony.</td>
</tr>
<tr>
<td>Customer Service</td>
<td>Allows full access to all areas, without Admin functions.</td>
<td>Workspace Marketing Reports Knowledge</td>
<td>Allows full access to all areas, without Admin functions.</td>
</tr>
<tr>
<td>Disable Delete on Main Entities</td>
<td>Members of this group are restricted from deleting Company, Contact, Opportunity, Incident or Activity records.</td>
<td>N/A</td>
<td>Members of this group are restricted from deleting Company, Contact, Opportunity, Incident or Activity records.</td>
</tr>
<tr>
<td>**Public ** Note: All Users are assigned to this Group</td>
<td>A generic group with full access to all but the Administrator functions.</td>
<td>Workspace Marketing Reports Knowledge</td>
<td>A generic group with full access to all but the Administrator functions.</td>
</tr>
<tr>
<td>Sales and Marketing</td>
<td>A generic group with full access to all but the Administrator functions.</td>
<td>Workspace Marketing Reports Knowledge</td>
<td>A generic group with full access to all but the Administrator functions.</td>
</tr>
<tr>
<td>Setup and Maintenance</td>
<td>Complete access to all functions and areas of OnContact</td>
<td>Workspace Marketing Reports</td>
<td>Complete access to all functions and areas of OnContact</td>
</tr>
</tbody>
</table>
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.**

![Diagram of User record with groups tab]

**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.