Profile Management Administrator (PMA) Reference Guide

- **Modify Your Own Profile (works for all users)**
  1) **Click** on your name in the upper right-hand corner of the screen
  2) You can update your password, defaults, and security details. If you're a PMA you can update your permission
  3) To get to your contact you can **click** on your name in the upper right corner of the screen *Welcome….*Your Name.…(Sign Out)

- **Create a Contact**
  1) **Click** the contacts tab in the upper portion of the screen
  2) **Click** add contact and fill out details. Be sure to select the proper location if you have many
  3) If a similar contact exists, that is the person you meant to create, **click** their name and edit their contact (if needed)
  4) If there are not similar results OR the similar results are not who you are creating then **click** SAVE

- **To Attach Multiple Business Locations**
  1) From the contact record (to navigate to there: **click** contacts tab, **click** search for contact, **click** their name), find the Associated Businesses Grid in the middle of the screen
  2) **Click** attach business location
  3) **Click** Save & New to continue adding locations <u>OR</u> **Click** Save & Close

- **Assign a Position**
  1) **Click** the contact tab and search for the contact
  2) **Click** their name in the search grid
  3) **Click** add position
  4) Pick a business Location and a position for that location
  5) **Click** Save & New to continue adding positions <u>OR</u> **Click** Save & Close

- **Delete a Position**
  1) From the contact record (to navigate to there: **click** contacts tab, **click** search for contact, **click** their name), find the Associated Businesses Grid in the middle of the screen
  2) **Click** the little arrow next to the Business Location
  3) If they have positions assigned **click** the position
  4) **Click** delete

- **Edit a Contact**
  1) From the contact record (to navigate to there: **click** contacts tab, **click** search for contact, **click** their name)
  2) **Click** edit in the upper left-hand corner of the ribbon

- **Create a User Profile**
  1) From the contact record (to navigate to there: **click** contacts tab, **click** search for contact, **click** their name)
  2) **Click** Create User Profile in the upper Ribbon
  3) **Assign** worker number if applicable
  4) **Select** Business permissions (upper grid) **<u>AND</u>** Territory Permissions (lower grid)
  5) **Click** create profile

- **Navigate to a User Profile (not your own)**
  1) From the contact record (to navigate to there: **click** contacts tab, **click** search for contact, **click** their name)
  2) **Click** on the user profile in the bottom of the screen

- **Unlock and Activate a User**
  1) Navigate to a User profile
  2) See the ribbon above to activate and unlock profiles
  3) Activate and unlock will be green if a profile is inactive or locked