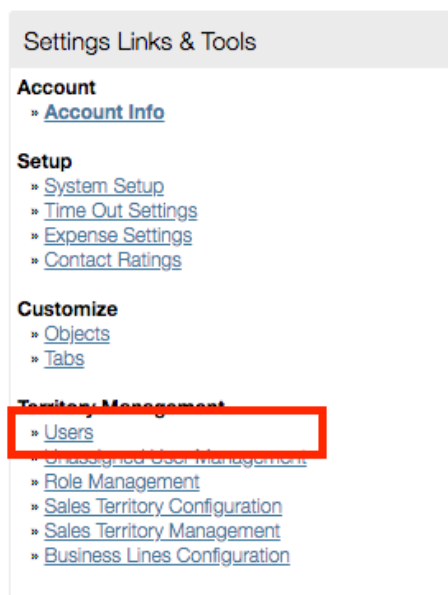


Adding a New User

To add a new user to your PlayMaker account, follow these steps

Live Chat **Settings** Mailbox Documents My Profile Log Out

- Click on *Settings* in the top right corner of the PlayMaker web application.



Settings Links & Tools

Account

- » [Account Info](#)

Setup

- » [System Setup](#)
- » [Time Out Settings](#)
- » [Expense Settings](#)
- » [Contact Ratings](#)

Customize

- » [Objects](#)
- » [Tabs](#)

Territory Management

- » **[Users](#)**
- » [Unassigned User Management](#)
- » [Role Management](#)
- » [Sales Territory Configuration](#)
- » [Sales Territory Management](#)
- » [Business Lines Configuration](#)

- Click *Users* in the *Settings Links & Tools* box on the left side of the window.



User Licenses Summary	
User Licenses	15
In Use	14
Available	1

- Verify that there is an available license in the *User Licenses Summary* box, under the Search Users box.

Note: If a license is not available, you may disable a user that is no longer using PlayMaker, or reach out to your Client Success Manager to add an additional license to your account.

Manage Users

New User

Active Users

<input type="checkbox"/>	ACTIONS	FIRST NAME	LAST NAME	EMAIL
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- Click the blue *New User* button displayed above the user list.
 - Add the user's first name, last name and email address, along with any other profile details desired.
 - At this time you may want to set a temporary password, to provide the user immediate access to the account.
 - We suggest adding the user's Branch (or other Sales Territory) to ensure accuracy in reporting.

- Adding City and State to a user's profile will assist in locating local referral sources in the Referral Source Database.
 - If your agency has purchased Market Data (TargetWatch), you should assign the appropriate State, County, City, or Zip Code.
- Click Save to save the user information, adding the new user to the list of active users.

Important Note: It is not recommended to overwrite current user information to replace a user. Please disable the old user, and add a new user. This maintains the history of the prior user, and causes fewer conflicts over time.