Skynamo

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Account Manager

The account manager role within Skynamo gives you the option to administrate your users yourself, without contacting the support team. You can add and remove users (as many as your agreement allows) and you can set up the necessary permissions yourself. Click on the Users tab to access your current users:

Dashboard   Timeline   Calendar   Products   Customers   Forms   **Users**   Reports   ▾ Jana

Once you have accessed the Users tab, click on the edit user option to the right. This will take you to the user permissions.

BUSINESS TIER
Unlimited users

45/50 Users

You have 45 active users out of 50 available

Add user

🔍 jana   Show   10 ▾

Name	Email	Role	Phone number	
Jana Clocked out since 9:47 AM	jana@skynamoo.com	Skynamo Account Manager	0861345346	Device syncing: 237

Edit user

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User Permissions

Username

Jana

Password

Email

jana@skynamo.co.za

Display name

Jana

Phone number

0861345346

Role

Skynamo Account Manager

Role

Skynamo Account Manager

Skynamo Field Rep

Skynamo Manager

Skynamo Merchandiser

Skynamo Office Admin

Skynamo Account Manager

Firstly you can set the user details. You can set up their username and password, as well as which role the user should have.

We will go through the list of permissions and what each entails on the following page.

Roles:

Skynamo Field Rep for your field users using the mobile app or back-office portal

Skynamo Manager for your management users using Insights

Skynamo Office Admin is for your office personnel using the back-office portal

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Can see all customers and activities of

All users

Here you can set which of your users should be seeing activities of specific colleagues only.

Tracking preference

Balanced

This indicates how accurate you would like the tracking to be, keep in mind the higher the accuracy the more battery intensive.

May add customers

☑

The user will be able to add new customers to the Skynamo database.

May update customer location

☑

The user can edit the customer location when necessary.

Hide unassigned customers

☐

When this is ticked the user will only see the customers they have been assigned to. When unticked the user can also see their colleagues customers.

May self-assign customers

☑

Self assigning customers needs the user to be able to see their unassigned customers.
This gives the user the option to assign themselves to their colleagues customers for 24 hours, allowing them to see the customer details.
The user can also complete any interactions at this customer. If colleagues are being shared between users or they sometimes help out at customers this is a great option for them to use.

May create credit request

☑

The user will be able to process credit requests.

May place order

☑

User can place an order using Skynamo.

May create quote

☑

User can place a quote using Skynamo.

May perform survey

☑

The user can do a stocktake when at their customers.

May edit price exceptions

☑

If there are deals applied to a customer the user can edit these, and they can also add new deals.

May edit order prices

☑

This needs to be ticked should you want your users to add discounts when they are placing orders or quotes.

May manage stock products

☑

The user can edit the required model stock at the customers.

May edit visit frequency

☑

The user will be able to set their own visit frequencies and edit existing frequencies under the customer details.

## May add/edit scheduled visits

☐

You can allow the user to add and edit their own scheduled visits. They can also edit visits added to their calendars.

Adding a new User

Add user

To start adding a new user, click on the Users tab, and select the add users button (if your dial indicates that you have licences available). If there are no more licences available, contact your Customer success manager from Skynamo to arrange for more.

If you have licences you are not going to be using you can also let us know to decrease the amount. In the case of new users contact our support team, your Customer success agent or lms@skynamo.com for them to be added to the LMS system.
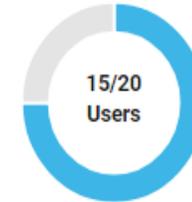
BUSINESS TIER
Unlimited users
15/20 Users
You have 15 active users out of 20 available

Click on the below article for full details on adding a new user to your Skynamo instance:

https://support.skynamo.com/hc/en-us/articles/360001463029-How-to-Add-a-New-User

If a user needs a password changed you can do this from your side. Click on the below link and follow the easy instructions:

https://support.skynamo.com/hc/en-us/articles/360001471345-How-to-change-a-user-s-password

To deactivate/remove a user from your instance follow the below instructions:

https://support.skynamo.com/hc/en-us/articles/360001471325-How-to-deactivate-delete-a-user

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Reports

When adding and removing users, attention needs to be given to the reports that need to be or have been setup.

The support team will generally set up the call reports for your team, as well as the missed call report. When adding a new user, create a call report for them, and make sure they have been added to the appropriate management and team reports. Also set up their missed call report for them.

If you are removing a user remember to remove the user from any management reports, and to delete their individual daily call report and missed call report.

For help on Adding or removing users from reports, or saving and setting up automated reports click on the links below:

https://support.skynamo.com/hc/en-us/articles/360001136998-Adding-or-removing-users-from-reports

https://support.skynamo.com/hc/en-us/articles/115000390165-How-to-set-up-and-save-automated-reports

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