

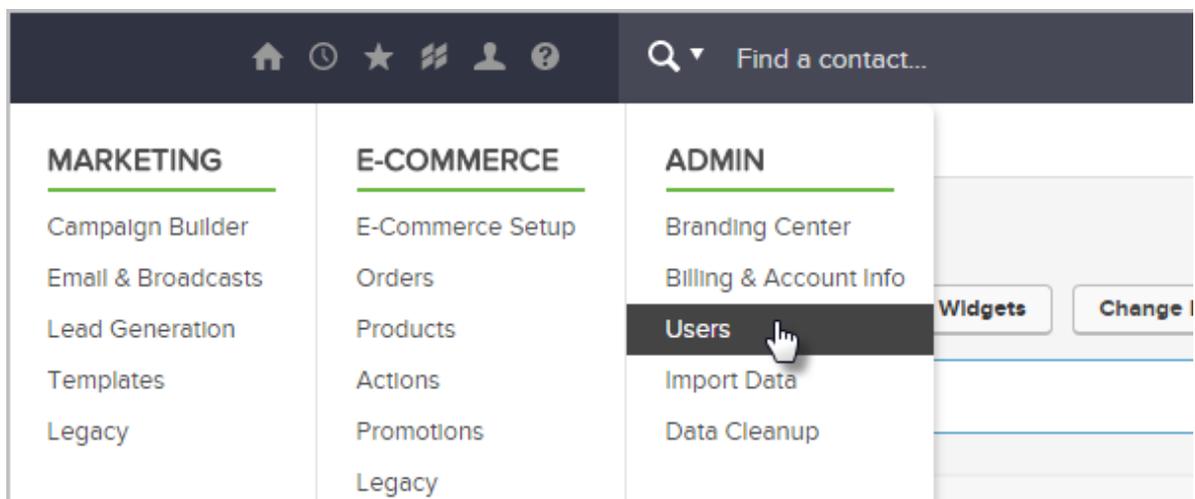
Add a User to the Admin or Sales Rep Group

Protip! The only user groups you'll need to concern yourself with are the **Admin** and **Sales Rep** groups. The other user groups can be ignored as they no longer serve a purpose in Infusionsoft.

If a user is in the Admin group, you cannot change their individual permissions...they have access to everything. You will need to first remove them from the Admin group, then you change their permissions.

- **Admin:** Allows a user to access all settings and features in your account with very few restrictions.
- **Sales Rep:** Allows a user to **own** an **Opportunity record** . A user that is not in the Sales Rep group can view and edit these records, but they cannot own them. In short, any user that is a sales person needs to be in this group!

1. Navigate To **Admin > Users**. Hover over the Infusionsoft logo and then click on the **Users** option under the **Admin** area. From there, click on the name of the user you would like to edit, then click on their **User Groups** tab.



<input checked="" type="checkbox"/>	7349	Martin Cash	martinc@infusionsort.com
<input checked="" type="checkbox"/>	7335	Dan A	dan
<input checked="" type="checkbox"/>	6968	Javier Trevino	Kanon
<input checked="" type="checkbox"/>	6892	Scott Richins	scott.richins
<input checked="" type="checkbox"/>	6788	Hua Ma	hma
<input checked="" type="checkbox"/>	6786	Tessa Lee	tessa.lee
<input checked="" type="checkbox"/>	6784	Gabriela McManus	gabmc78

Edit User Accounts [\(back to search results\)](#)

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[User Groups](#)

Click to any of the groups below, select the group from the drop down box.

- To add the user to a group, click on the **Please Select One** drop-down and then on the group you would like to add this user to.

To add this contact to any of the groups below, select the group from the drop-down box.

- Please select one
- Accounting
- Admin**
- Marketing Manager
- Order Manager
- Sales Manager
- Sales Rep

	Name
1	Admin

- Click on the **Add** button

Groups

To add this contact to any of the groups below, select the group from the drop down box

Admin ▼

Current Groups

GroupId	Name
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4. **Pro-tip!** Clicking on the **Save** button will not add a user to a group. Only the **Add** button will!
5. To remove a user from a group, navigate to user's profile under the **User Groups** tab as shown above.
6. Click on the **Remove** link corresponding with the Group to be removed.

Name	Remove
Admin	Remove