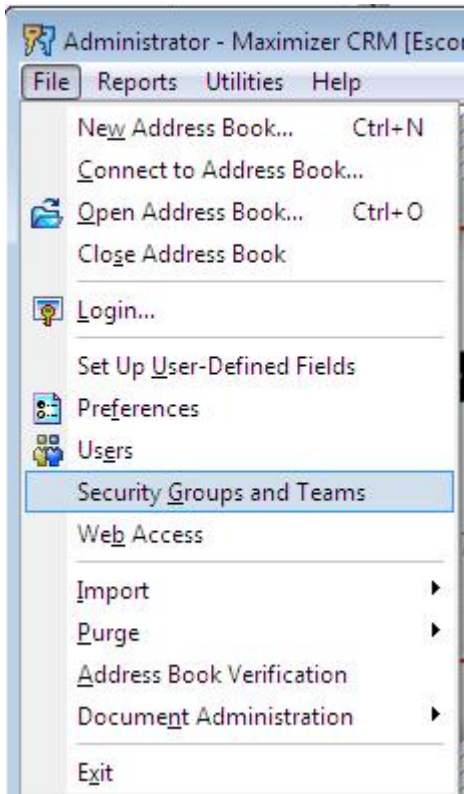


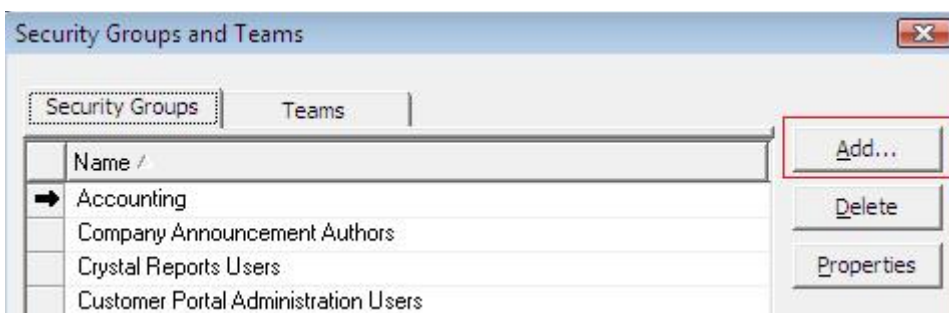
### Setting up a Security Group

Maximizer CRM has many security features which can be quite complicated to setup. One of the easiest ways to set them up is to use security groups to build a template of what you want your users standard rights to be.

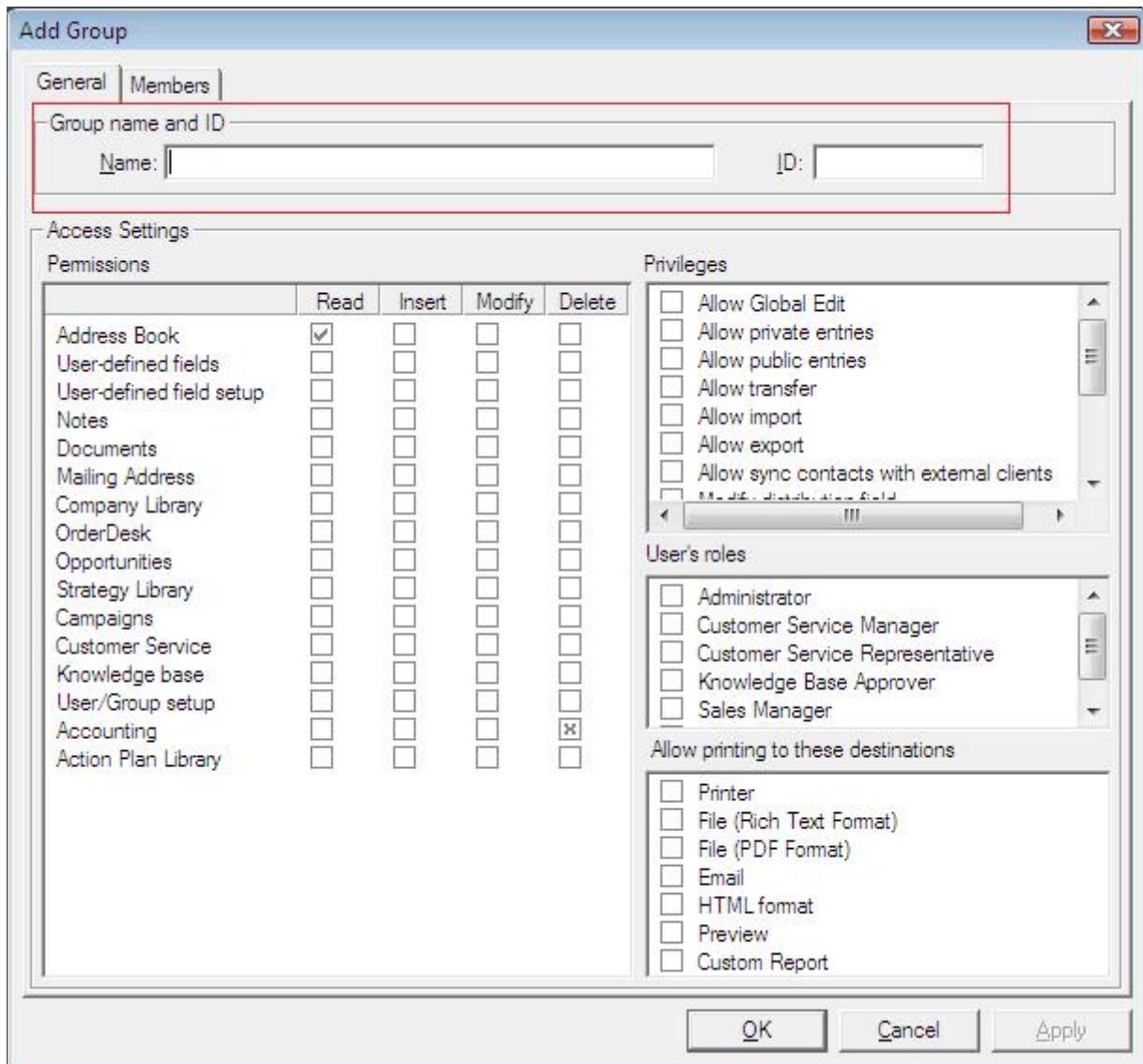
To setup a Security Group you need to load the Maximizer Administrator and log into the address book you use, then click File>>Security Groups & Teams:



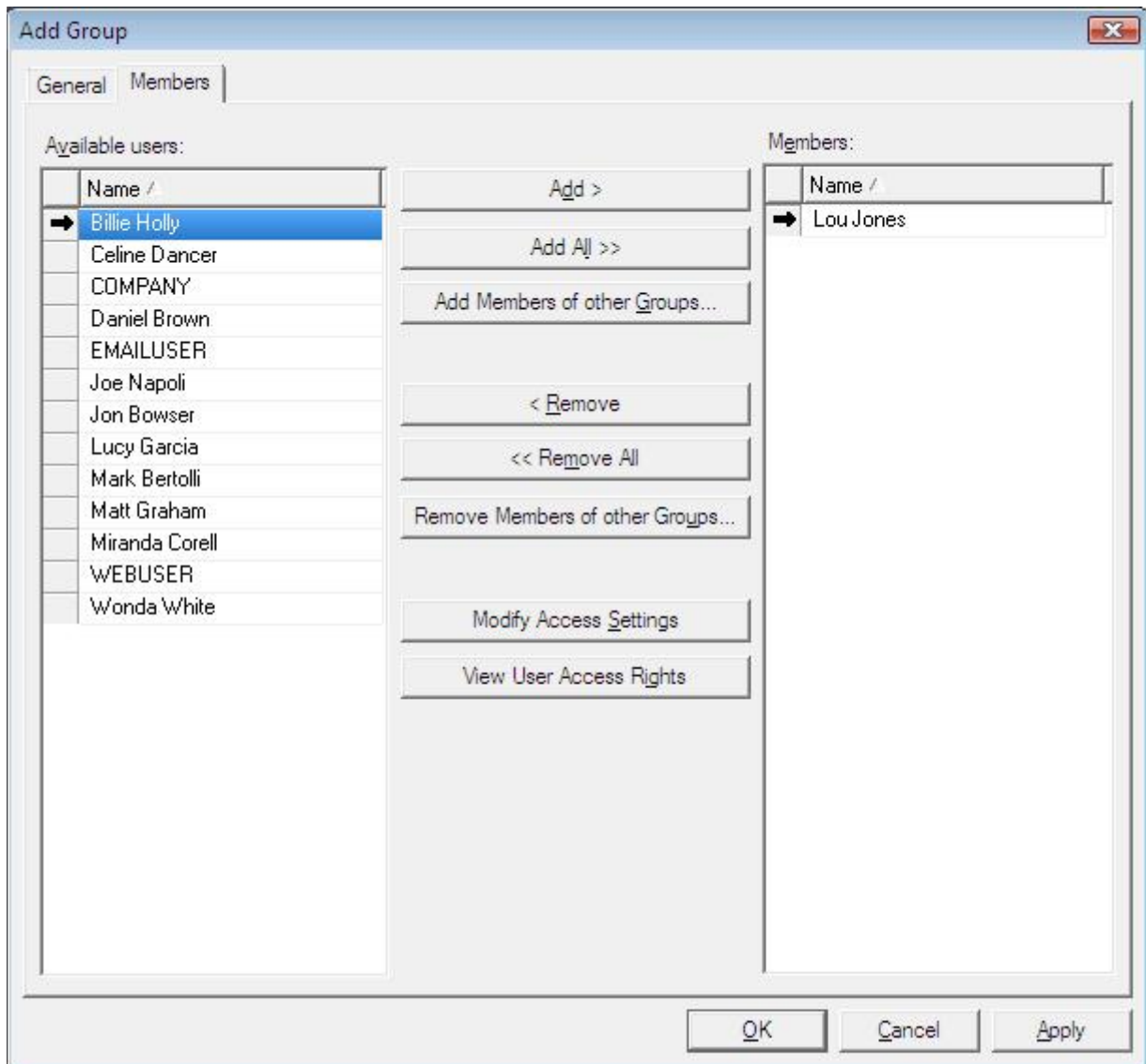
Once you have clicked this option you will see the Security Groups and Teams management screen:



To add a new security group you will need to click the Add button (shown highlighted in Red in the above picture). Once you click that button you will see a blank security group profile:



The first thing you must do is setup the Name and ID (again highlighted in Red above), these values must be unique. Once you have chosen a name and ID you can set the rights. Each of the boxes can contain a tick, a cross or be blank. A tick means explicitly grant this right, a cross means deny it and leaving it blank lets any user specific settings to be enabled. Once you have the rights setup you can click the second tab and use the add members screen to setup which users will be part of this group.



Once you have added members you are done. The easiest way to set this up is to have at the minimum a basic users group with add, read and edit but no delete rights, a power users group with additional permissions and an Admins groups with almost all. Users can be members of multiple groups and the highest level of granted permission is the one that will be used.

As always, if you wish to discuss this in detail please feel free to contact CABC Technical Support on 01635 570990.