



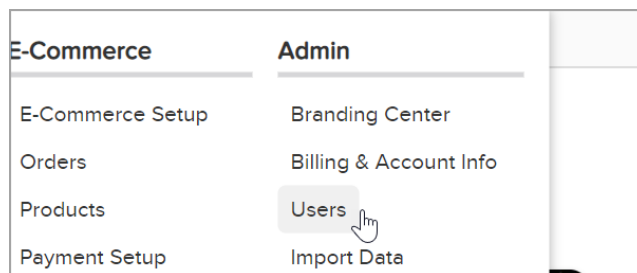
How to Change A User Or Change User's Role

Below is the procedure to update your system to a new HR manager, Care Manager or Scheduling Coordinator.

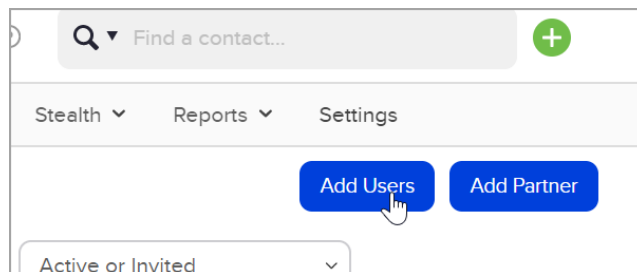
1. First add the new person as a user

You can create user profiles for people who will be working in the app and send them a welcome email to get started.

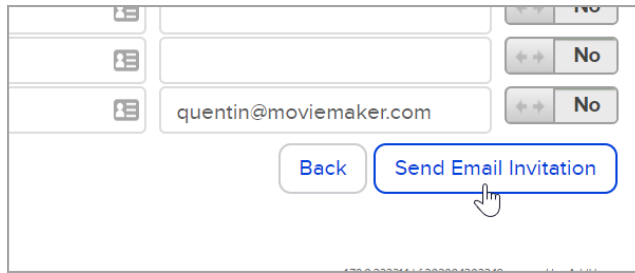
1. Navigate from the Keap menu to **Admin** and click **Users**.



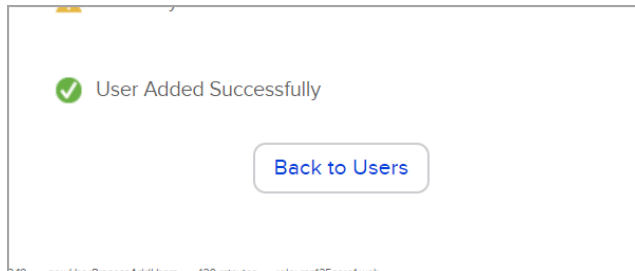
2. Click the **Add Users** button.



3. Enter a First Name, Email Address, and click the **Send Email Invitation** button.

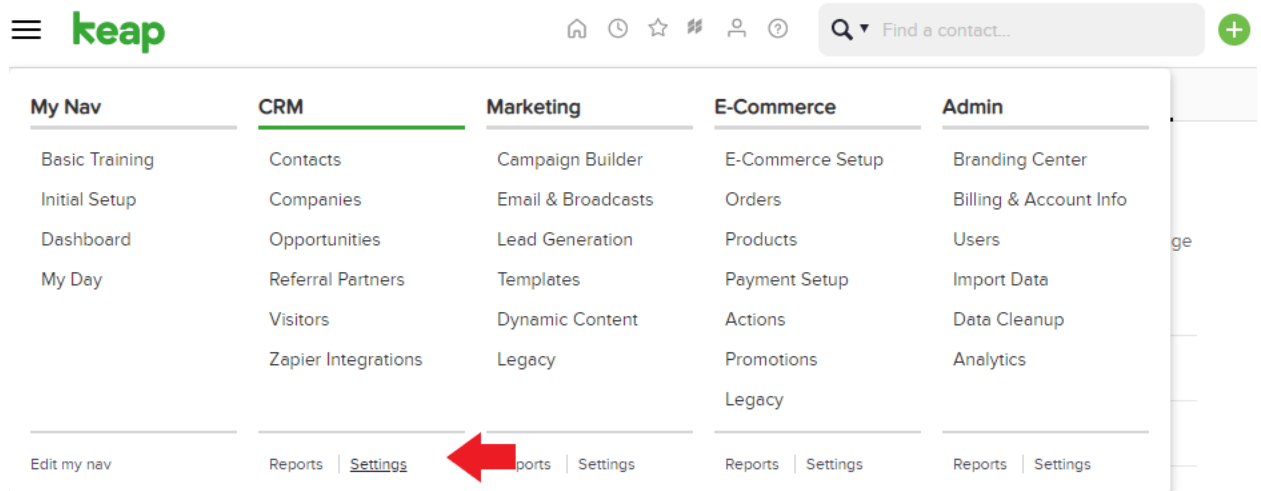


4. A results page confirms that you added a user.



5. The new user will receive an email invitation to set up an Keap user account. If your user has not received the email within a few minutes, make sure to check the junk and spam email folders.

2. Then add the new person to the appropriate Round Robin by selecting; CRM > Settings



Then Select Round Robins;

All Contact & Company Settings

Contact & Company Settings


General

Task/Appt/Note Settings

Tags

Tag Categories

Scores

Round Robins 

Action Sets

Sales Settings

Company

Minimum Account # Length:

Contact

Contact Types:

Caregiver Applicant
 Caregiver
 Client
 Personal
 Prospect
 Responder
 Referral Partner
 Vendor

Titles:

Mr.
 Mrs.
 Dr.
 Ms.

Select [Edit] for the appropriate Round Robin based on function




keap

Contacts ▾ Companies ▾ Opportunities ▾ Referral Partners ▾ Visitors Zapier Integrations Reports ▾ Settings

Round Robins

4 results

20 ▾ per page

General	Edit	Name	Logic	Delete
Task/Appt/Note Settings	[Edit]	Default Round Robin	OnePerRound	[Delete]
Tags	[Edit] 	HR Manager	OnePerRound	[Delete]
Tag Categories	[Edit] 	Care Managers	OnePerRound	[Delete]
Scores	[Edit] 	Scheduling Coordinator	OnePerRound	[Delete]
Round Robins				

Below is the selection for care manager, simply enter 0 for the old care manager and enter 1 for the new care manager. Then press save the save button on the bottom.

Round Robin Name & Distribution Logic

Name

Logic One record per round [?](#)
 Distribute records based on ratio [?](#)

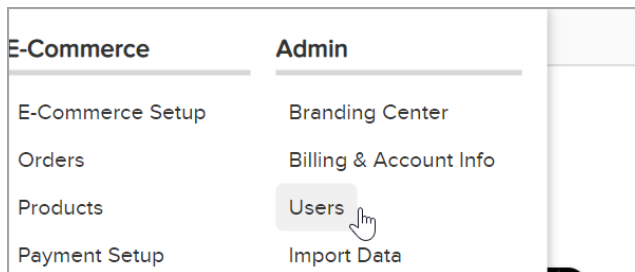
Create Assignment Ratios

User Group

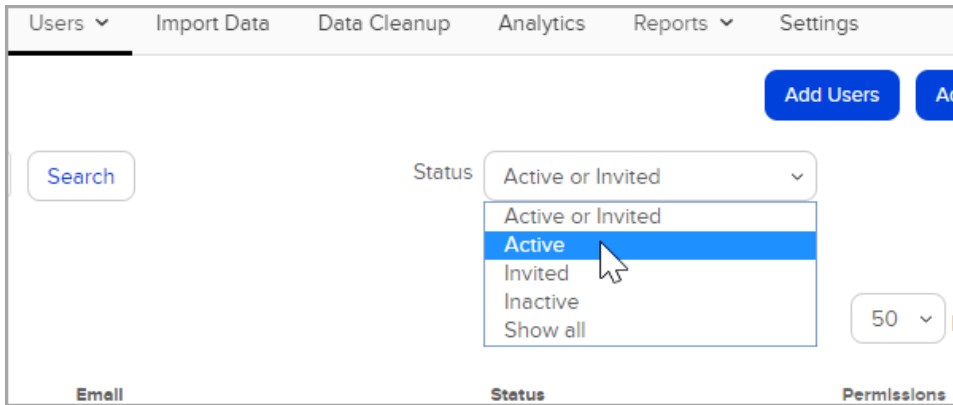
User	Number
Michael Ferris	<input type="text" value="1"/>
Daniel Gallatin	<input type="text" value="0"/>
Jennifer Ramos	<input type="text" value="0"/>
Box Out Marketing	<input type="text" value="0"/>

1. Next deactivate the previous user and reassign their contacts owner to the new person.

Navigate to **Admin > Users**.



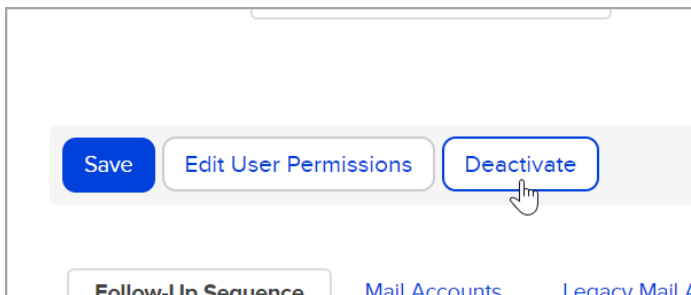
1. In the status drop-down, select **Active** to view all active user profiles.



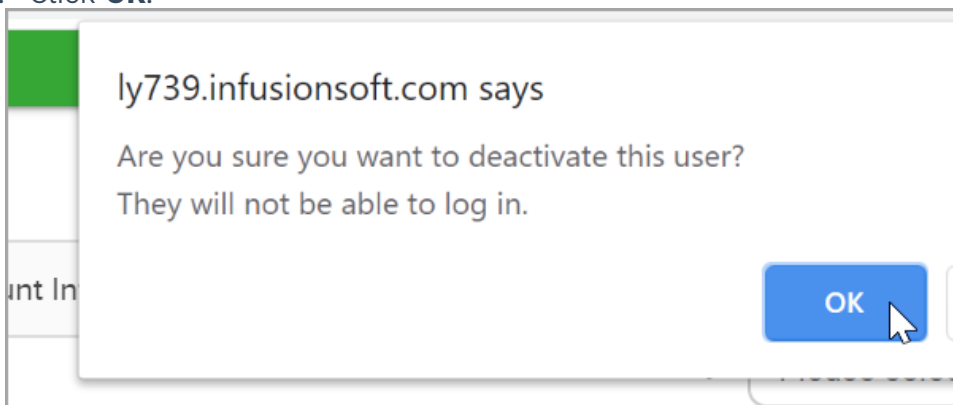
2. Click the user name.

<input type="checkbox"/>	Id ↓	Name	Username
<input type="checkbox"/>	53	Phillip Michieli P	phillip.mi
<input type="checkbox"/>	21	Tessa Randall	tessa.ran

Scroll down and click the **Deactivate** button.



3. Click **OK**.



4. You are about to deactivate a user. Before doing so, reassign the user's active accounts to other users, e.g., # of Contacts assigned, and Pending tasks. In the

image below, it indicates that there are 104 contacts assigned to the user you are about to deactivate, and zero of those are assigned to new users.

Deactivate User [\(Return To User Record\)](#)

You are about to deactivate a User. Before doing so, you have to transfer this User's active accounts to another User following:

of Contacts Assigned to User: 0 /104
of Leads Assigned to User: 0 /92
of Pending Tasks for this User: 0 /12

Reassign Logic (Contact)

Ratio - Each user gets up to the amount specified; the process repeats for extras.
 Hardcoded - Each user gets up to the amount specified; extras are not reassigned at all.

Choose Number of Contacts to Reassign to Each User

Round Robin	<input type="text" value="0"/>	Please select one ▼
Alwayshelpful Support	<input type="text" value="0"/>	
Amanda Madsen	<input type="text" value="0"/>	
Geraldine Vaughn	<input type="text" value="0"/>	
Mathew Magwood	<input type="text" value="0"/>	

5. You can use Hardcoded to specify that all contacts should go to the new user profile. When the number of assigned contacts are accounted for; e.g., 104/104. We use Round Robins for the Recruiting campaign,

of Contacts Assigned to User: 104 /104
of Leads Assigned to User: 0 /92
of Pending Tasks for this User: 0 /12

Reassign Logic (Contact)

Ratio - Each user gets up to the amount specified; the process repeats for extras.
 Hardcoded - Each user gets up to the amount specified; extras are not reassigned at all.

Choose Number of Contacts to Reassign to Each User

Round Robin	<input type="text" value="0"/>	Please select one ▼
Alwayshelpful Support	<input type="text" value="5"/>	
Amanda Madsen	<input type="text" value="50"/>	
Geraldine Vaughn	<input type="text" value="20"/>	
Mathew Magwood	<input type="text" value="29"/>	

6. Once you have reassigned all Contacts, and tasks, click the **Process** button.