

WindsorBusinessHub

windsorbusinesshub.com

Procuring BaseOne Accounts to users or managers

Welcome! As Windsor Business Hub Network Member your business has access for five users to BaseOne software included in your membership

1

Login as account owner using your credentials.

Select CRM login.

The dashboard page shows up. If you're the owner of the account the option ADD/EDIT USERS will be on the section MANAGER ACCESS:.

2

Select "ADD/EDIT USERS".

The screen with all the users including you will show up to edit or add..

3

Select "ADD NEW ACCOUNT".

Fill up the information for the new user. The system generates a random CRM KEY, the new user will need this key to set or reset his/her password. Take note of it and provide a copy of the key to the new user.

4

Select the button "ADD NEW ACCOUNT".

A message "New account created successfully" will prompt. Select "OK" to go back to ADD/EDIT/DELETE ACCOUNTS to verify the new user you have added..

5

Account Maintenance.

You will have access to update, reset the password or delete any of your users in the "ADMIN/OWNER ACCOUNT" page and the option print all accounts at the bottom left "Print Accounts". On top of the page you can see how many accounts are you using

6

You are all set !

Remember, you always can have additional accounts for your business, check the website for the latest pricing information.

Questions? Contact us at windsorbusinesshub.com — We're here to help you grow.

