Pinpoint AVM 4.0 Management Users and Contacts Tab

User Manual

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From the *Main Web Page*, you can navigate to the "Manage" tab; here we can manage to Tools, Services, Global Settings, Department, Contacts, Users, Vehicles, Drivers, Locations and Specialties. This manual concentrates on the Users and Contacts Tab.

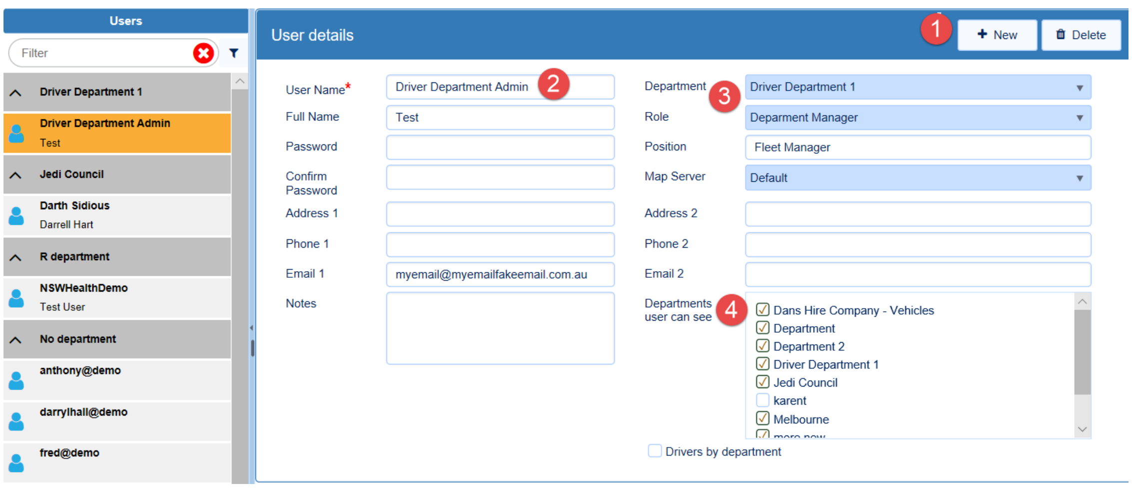
1 MANAGE TAB > USERS

The Users tab is where you create accounts for staff whom you want to manage vehicles, drivers, departments ETC depending on their access. Users and Contacts are mutually exclusive, that is you can have a user that is or isn't contact, and you can have a contact that is or isn't a user.

1.1 *Details*

This window allows management of all the users on the system. You can create, edit or delete users from here.

To create a new user:



1. Click New.
2. Create a username (this field is the only mandatory field).
3. Select their Department, and their role (this determines their rights) See below for more information on Roles.
4. If you have created departments, this is where you select them to give the users access by checking the box next to the department name.

To edit a user select it from the list. You can now change the user login name, reset the password, change the user Role or delete the user.

Note: These changes appear at next login. If you grant a user permission to a vehicle group/department, the user sees all the vehicles in that group/department.

Note: If Pinpoint customer support already created some users for you, they display in the "Users List" on the left.

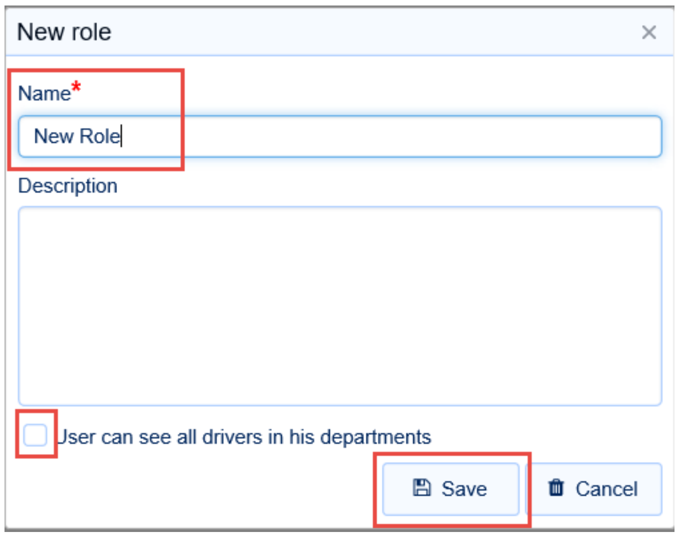
1.2 *Roles and Rights*

1.2.1 Details

This window allows the creation of role types. A role defines the level of application access including application tools, management functions and reports. Roles are assigned to users to control their level of access.

Existing roles listed down the left-hand pane, to edit or delete, click on the corresponding button.

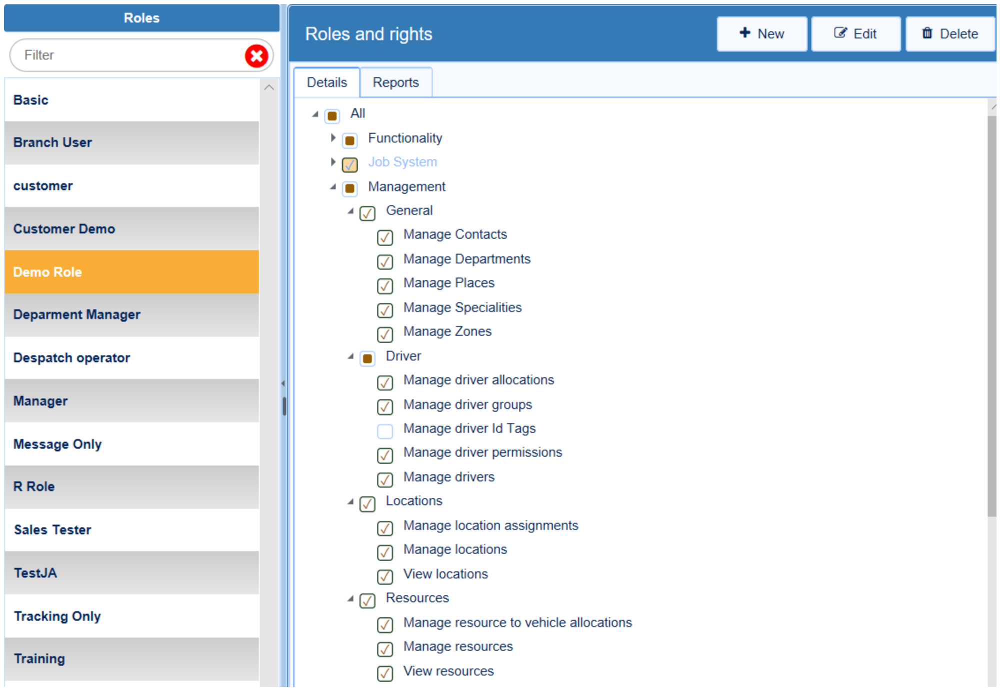
To create a new Roles, click on new.



The name is a mandatory field, to quickly give the new role access to all drivers in the department check the box and then click on Save.

From the details tab, you assign rights based on item including Driver, Location, Vehicle, Resources ETC.

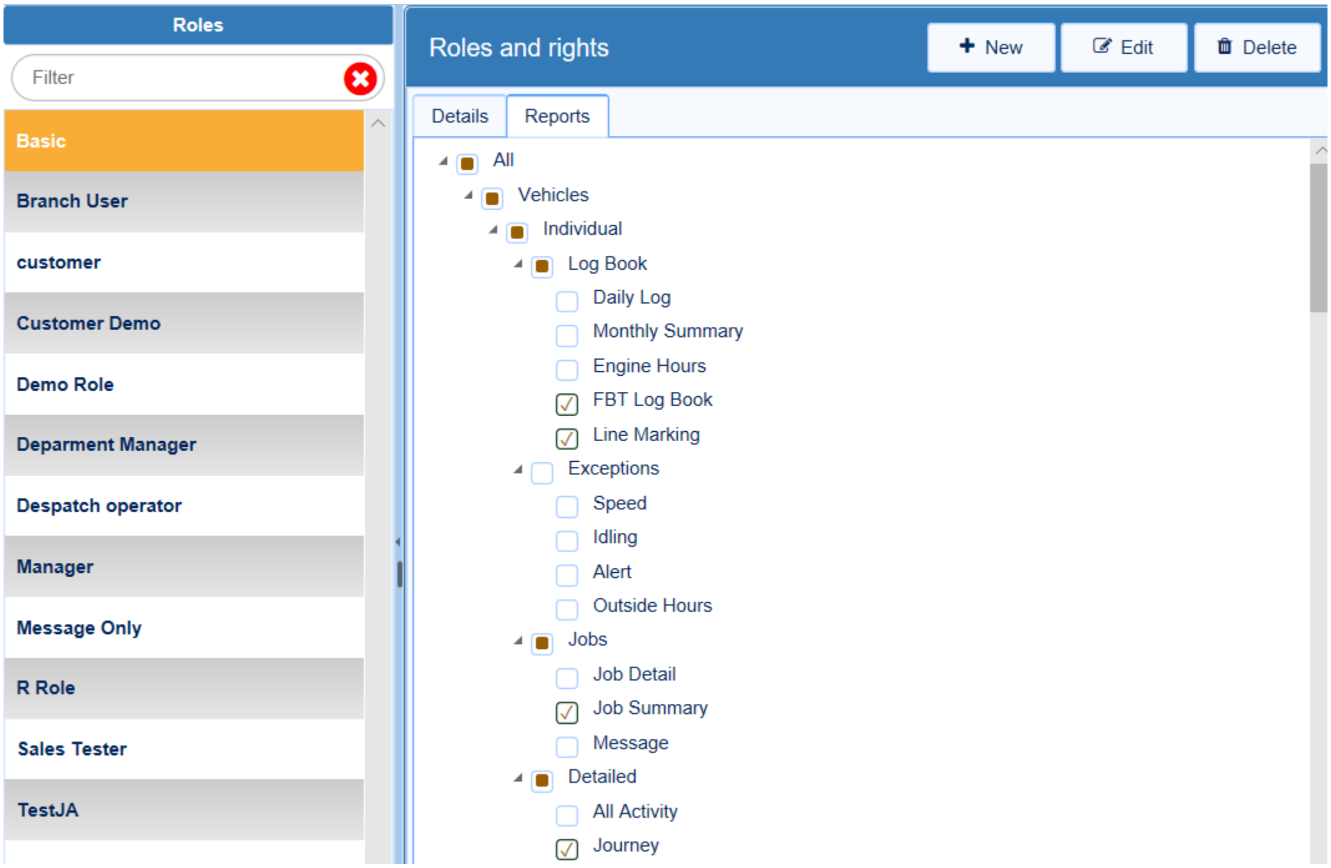
Tick functionalities as desired. Tick "All" to grant access to all functionalities. Click 'Save' on the top of the page to save your changes.



1.2.2 Reports

The reports tab allows you to select the reports that a user is authorised to see.

Similar to the 'Details' tab above, select the reports you want that user role to access then click on save.



To edit a role select it from the Role List on the left. You can now change the role preferences.

To delete a Role, click the delete button.

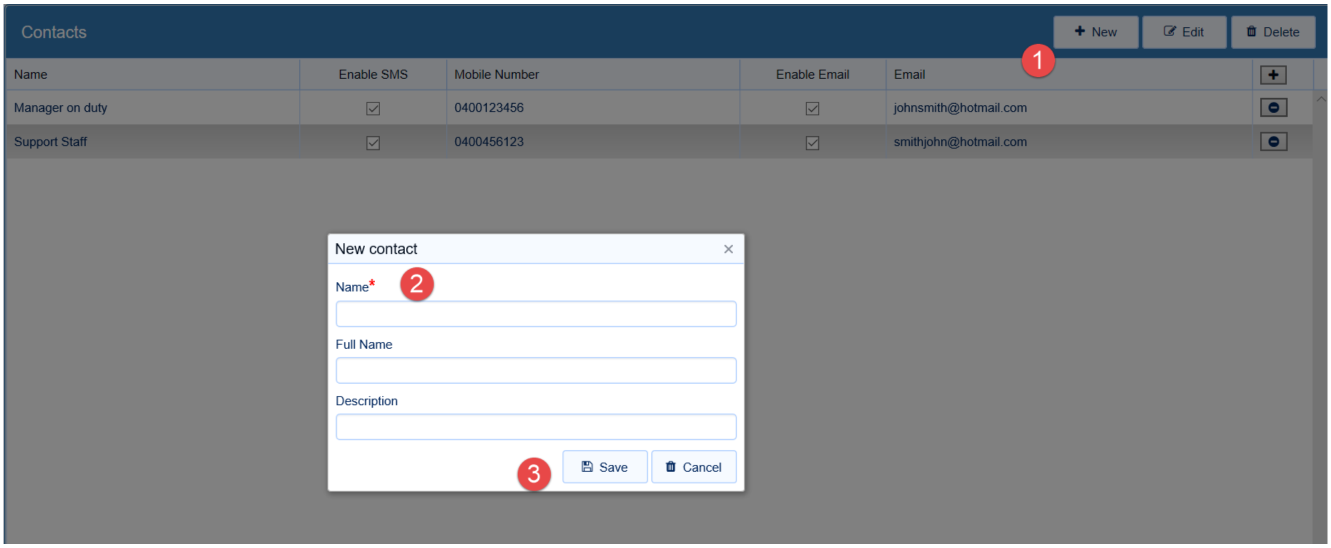
IMPORTANT: You must not delete roles assigned to users.

2 MANAGE TAB > CONTACTS

2.1 *Details*

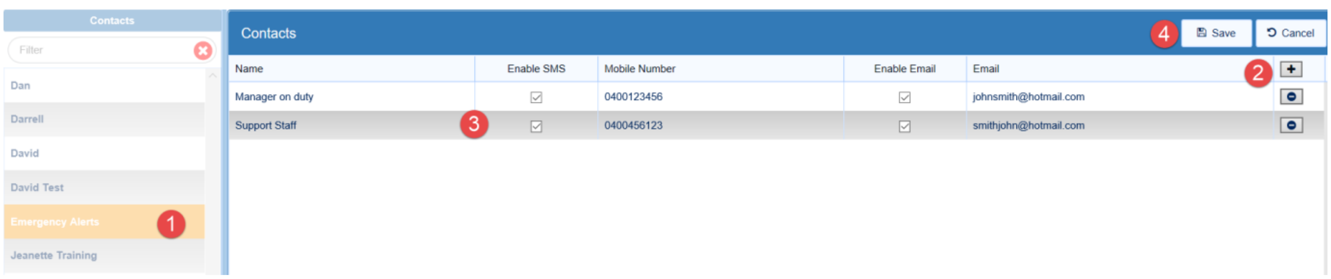
Contact is used for alerts and reports.

To create a new contact in the system:



1. Click on “New” button on the top right of the window.
2. Fill in the form, (“Name” is the only mandatory field).
3. Click Save, the contact now appears in the list to the left.

To enable the SMS or Email alerts, you have to add the mobile number and email address to the contact:



1. Choose the contact from the left-hand side tree.
2. Click on the ‘+’ button at the end of the titles bar.
3. Fill the name, mobile, email address (you do not have to have both the email and SMS)
4. Click ‘Save’

The contact you created is now able to receive scheduled reports and receive “Alert” notifications.