





1. Log into the Political CRMS

Main Menu Constituents Reports Email Administration © 2003-2008 Pentad Systems, LLC

CRMS Main Menu

- Constituent Management
- Reports Module
- E-mail Management Module
- CRMS Administration

2. At the top of the screen, click on “Administration”

Constituent Management Module Administration Menu

CONSTITUENTS	ADMINISTRATION
Display a constituent	Manage Categories
Add a new constituent	Manage Codes
Edit a constituent	Manage Staff
Delete a constituent	Manage Security
	Manage Web Contributors

WEBSITE MANAGEMENT

Page Filler

3. At the right, under Administration, click on “Manage Staff”.

Manage Staff

ACTIVE Add

LAST NAME Search FIRST

USERNAME PASSWORD

EMAIL

4. Type in the Last Name, First Name, Username, Password, and Email of the volunteer. When you are finished, click “Add”.

Manage Staff

ACTIVE Update Clear

Pentad User

LAST NAME Search FIRST

pentad Manage Password

USERNAME

nichols@pentadsys.com

EMAIL



5. At the top menu bar, click on “Administration” again.

Constituent Management Module Administration Menu

CONSTITUENTS	ADMINISTRATION
Display a constituent	Manage Categories
Add a new constituent	Manage Codes
Edit a constituent	Manage Staff
Delete a constituent	Manage Security
	Manage Web Contributors
WEBSITE MANAGEMENT	
Page Filler	

6. Click on “Manage Security”.

System Security Administration

- Everyone** The 'Everyone' group only takes effect if there is no other entry type for this employee, a standard use for this group would be to set Everyone to have no access to the 'Security' directory. Make sure to give yourself (at the 'Employee' level) access first though! Security is applied immediately!
- Division** A 'Division' record will override any 'Everyone' entries, but is overridden by any 'Labor Code' or 'Employee' entries. A standard use for this group would be to deny an entire division access to the Human Resources system (HRIS) since they would have no need for it.
- Labor Code** A 'Labor Code' record can only be overridden by an 'Employee' entry. This can be used to give access to an area to all Vice Presidents, but not to Part-Time Workers. You will have to specify a division as well for display purposes.
- Employee** 'Employee' records have priority over all other record types. For example, if the employee record grants access to an area, but the employees labor code is denied access then they will still get access since the 'Employee' record takes priority. The main use of the employee record is for people that must be the exception to a rule like the example.

[Edit Security Settings](#)

7. Click on the radio button “Employee”

System Security Administration

- Everyone** The 'Everyone' group only takes effect if there is no other entry type for this employee, a standard use for this group would be to set Everyone to have no access to the 'Security' directory. Make sure to give yourself (at the 'Employee' level) access first though! Security is applied immediately!
- Division** A 'Division' record will override any 'Everyone' entries, but is overridden by any 'Labor Code' or 'Employee' entries. A standard use for this group would be to deny an entire division access to the Human Resources system (HRIS) since they would have no need for it.
- Labor Code** A 'Labor Code' record can only be overridden by an 'Employee' entry. This can be used to give access to an area to all Vice Presidents, but not to Part-Time Workers. You will have to specify a division as well for display purposes.
- Employee** 'Employee' records have priority over all other record types. For example, if the employee record grants access to an area, but the employees labor code is denied access then they will still get access since the 'Employee' record takes priority. The main use of the employee record is for people that must be the exception to a rule like the example.

[Choose](#)

[Edit Security Settings](#)



8. Click on "Choose"

System Security Administration

Choose an Employee

<p style="text-align: center;">Search</p> <input style="width: 90%;" type="text" value="Type partial name, ENTER"/>	<p style="text-align: center;">Employee</p> <div style="border: 1px solid gray; padding: 5px;"><p style="text-align: center;">Bailey, Butch</p><p style="text-align: center;">Carter, Patti</p><p style="text-align: center;">Pentad, User</p></div>
---	--

9. Select the Volunteer you wish to edit the Security Settings for

System Security Administration

<input type="radio"/> Everyone	The 'Everyone' group only takes effect if there is no other entry type for this employee, a standard use for this group would be to set Everyone to have no access to the 'Security' directory. Make sure to give yourself (at the 'Employee' level) access first though! Security is applied <u>immediately!</u>
<input type="radio"/> Division	A 'Division' record will override any 'Everyone' entries, but is overridden by any 'Labor Code' or 'Employee' entries. A standard use for this group would be to deny an entire division access to the Human Resources system (HRIS) since they would have no need for it.
<input type="radio"/> Labor Code	A 'Labor Code' record can only be overridden by an 'Employee' entry. This can be used to give access to an area to all Vice Presidents, but not to Part-Time Workers. You will have to specify a division as well for display purposes.
<input checked="" type="radio"/> Employee	'Employee' records have priority over all other record types. For example, if the employee record grants access to an area, but the employees labor code is denied access then they will still get access since the 'Employee' record takes priority. The main use of the employee record is for people that must be the exception to a rule like the example.

Pentad, User



10. Click on the button “Edit Security Settings”

11. Make the Modules look like the following by selecting + to allow the user or – to disallow the user to view/change the pages:



12. Click on the Double Arrow (▶▶) next to “Customer Management Module” and make the screen look like the following:

+	-	X		PAGES
+	-	X	-	Category Management Utility
+	-	X	-	Change Password
+	-	X	-	Constituent Management Module Administration
+	-	X	+	Constituent Management Module Main Menu
+	-	X	+	Constituent Management Module: Display a Constituent
+	-	X	-	Contribution Editor
+	-	X	+	Display a Constituent
+	-	X	+	Display Contributor Information
+	-	X	+	Edit a Constituent
+	-	X	-	E-mail Management Module: Send E-mail
+	-	X	-	E-mail Management Module: Send E-mail
+	-	X	-	Import File
+	-	X	-	Report Module: Data Export to Excel
+	-	X	-	Report Module: Data Export to Excel
+	-	X	+	Select Customer
+	-	X	-	Send a Template-wrapped E-mail Message
+	-	X	-	Some Tests