



User and Contact Worksheet

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What is the User and Contact Worksheet?

A User Contact Worksheet

(<http://dyzz9obi78pm5.cloudfront.net/app/image/id/59395e5a6e121cc52899ec8f/n/30c---user-contact-worksheet.xlsx>) is emailed to you prior to your **Kickoff call**

(<http://guide.inmotionnow.com/help/onboarding-kickoff>) . This assists your Customer Success representative in setting up the initial Users and Contacts in your account. There are two tabs to complete in the spreadsheet.

Download User Contact Worksheet

(<http://dyzz9obi78pm5.cloudfront.net/app/image/id/59395e5a6e121cc52899ec8f/n/30c---user-contact-worksheet.xlsx>)

Users Tab

Temporary Password:		1234567		Should this user be an Admin or Staff user?	Should this user be able to request jobs by filling out your creative brief?	Should this user be able to approve incoming job requests?	Should this user be allowed a dashboard to view all proofs that require their review?	Will this user also be reviewing proofs?	Should this user have the ability to hide or disregard comments of other reviewers? (This is powerful. Use sparingly.)		
Name		Title								Email Address	
User Role		User Permissions								Review Permissions	
John Doe		Director of Marketing		jdoe@marketing.com		Admin	Yes	No	Yes	Yes	No

1. In the top-left, add a temporary password of your choosing (Note: Users can change their passwords once logged in).
2. Following the “John Doe” example, complete the fields with each User’s information and their role. Be sure to indicate the User and reviewer permissions with a “Yes” or “No” answer.

Requesters/Reviewers Only Tab (Contacts)

Temporary Password:		1234567			Should this reviewer be able to request jobs by filling out your creative brief?	Should this contact be allowed a dashboard to view all proofs that require their review?	Should this contact have the ability to hide or disregard comments of other reviewers? (This is powerful. Use sparingly.)	Should this contact have the ability to route out proofs that are placed on hold?
Name		Job Title						
Email Address								
Kate Smith		Director of HR		Kate@avapole.com	Yes	Yes	No	Yes

1. In the top-left, add a temporary password of your choosing (Note: Contacts can change their passwords once logged in).



2. Following the “Kate Smith” example, complete the fields with each Contact’s information. Be sure to indicate the reviewer permissions with a “Yes” or “No” answer on this tab, as well.