

QUICK START GUIDES

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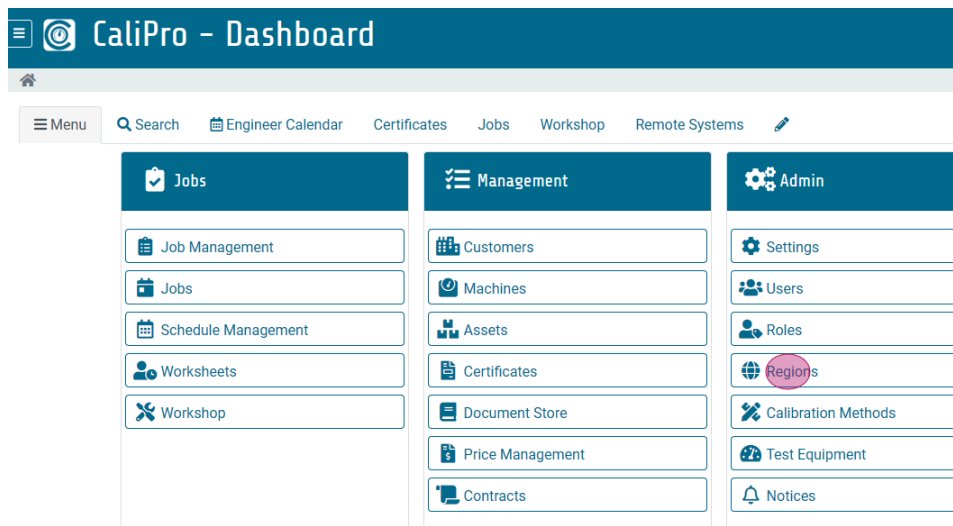


Regions

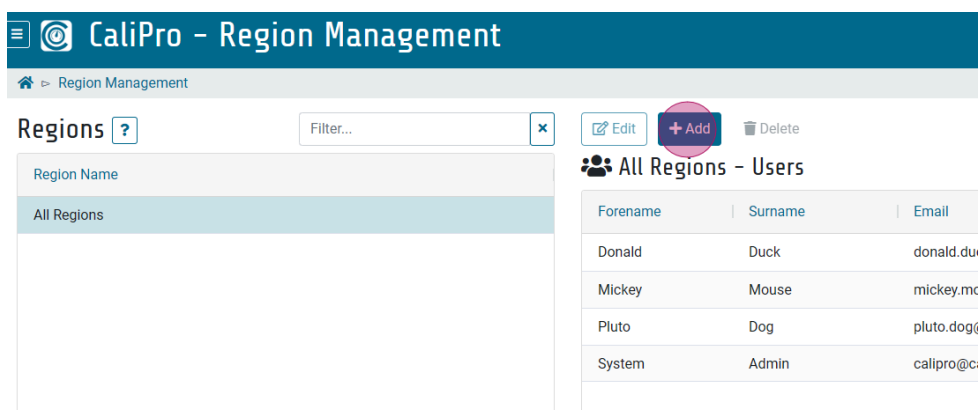
'Regions' are used to split your customers up into groups. A 'Region' can then be assigned to an engineer.

This ensures that your staff only have access to the information they need to complete their jobs and you are not sharing data inappropriately.

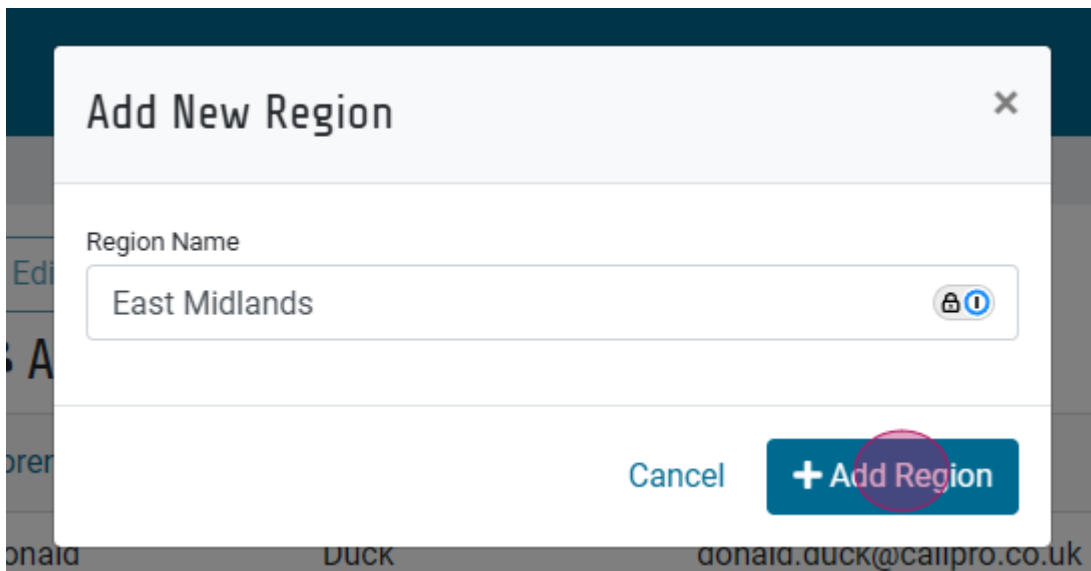
1. On the main dashboard, click "Regions"



2. To add a region, click "+Add"



3. Give the Region a name.
4. Click "+Add Region" to save.



TIP!

To allocate a User to a Region, navigate to Users, select the Admin | User and Edit their record.

To add a Customer to a Region, navigate to Management | Customers and Edit their record.

For further support please email support@calipro.co.uk or call the helpdesk.

