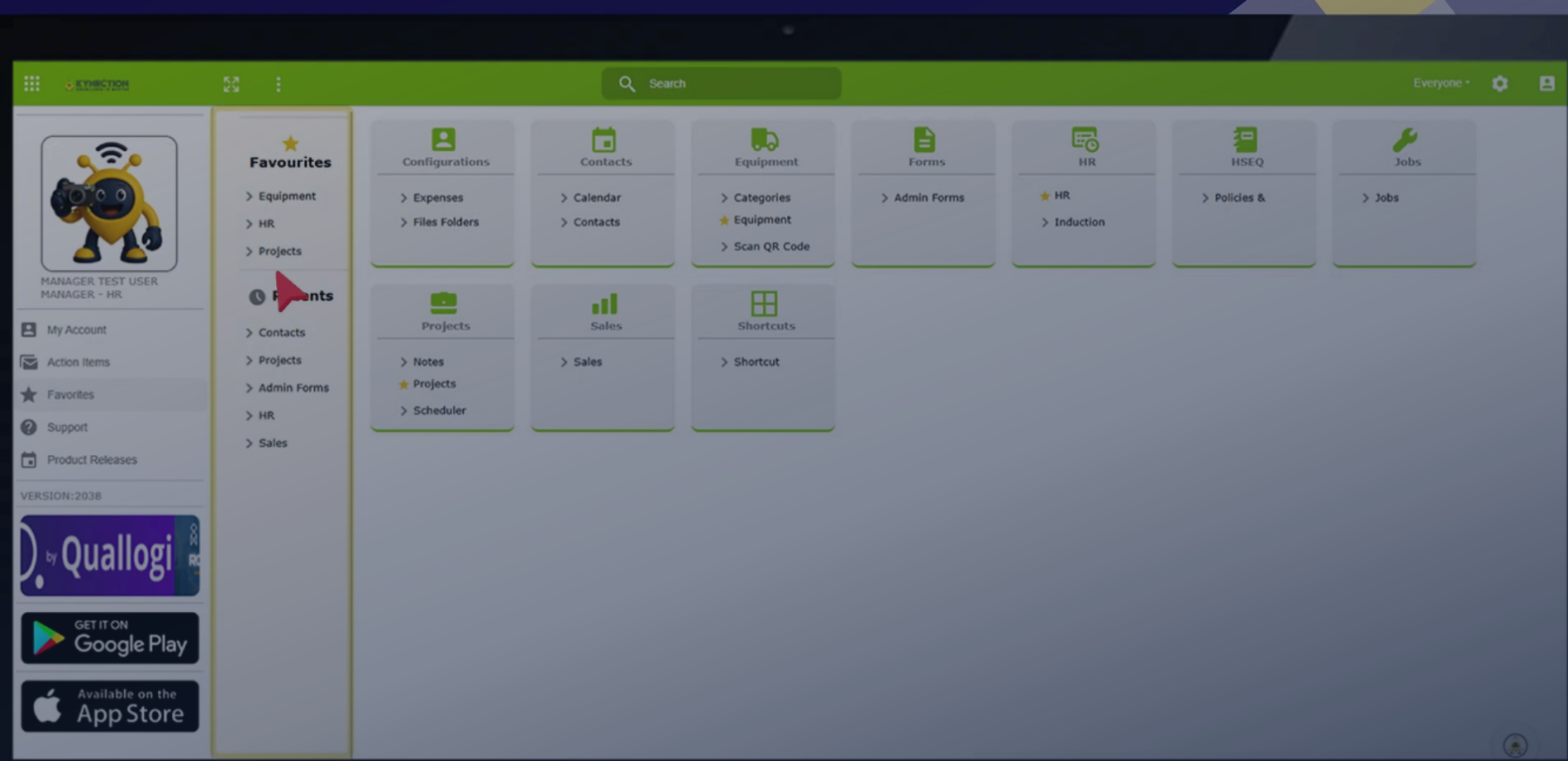




FEATURE GUIDE

KYNECTION • KIM WELCOME • PART 2

Navigate Access, *Contacts and Forms*

A manager's first hour: what your access level unlocks, how the dashboard and favourites work, the toolbar that repeats across modules, and finding what you need in contacts and forms.

3 CHAPTERS

2 MIN 23 SEC

KIM WELCOME

WEB USERS • MANAGERS

FEATURE GUIDE • 2 MIN 23 SEC

What this feature covers

Three stages, seven steps: access levels, the dashboard and toolbar, then contacts and forms.

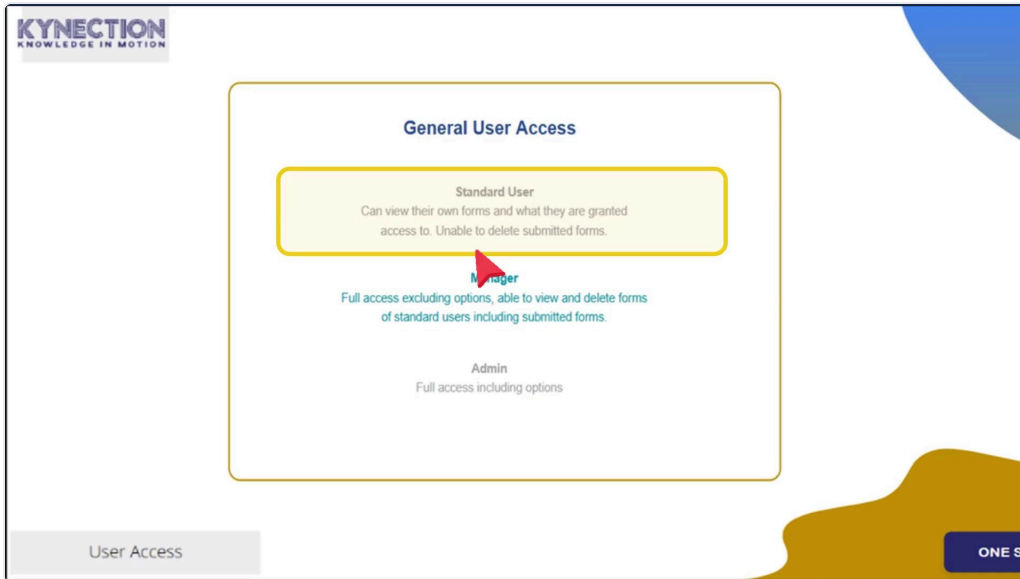
CH 01	Access levels What each level unlocks.	00:00–00:39
CH 02	Dashboard and toolbar Getting around quickly.	00:39–01:27
CH 03	Contacts and forms The two record sets a manager touches most.	01:27–02:23

- **Start with your access level.** Standard, Manager and Admin see different things, which explains most of what looks missing.
- **Favourites are worth setting.** They put the modules you use daily one click from the dashboard.
- **The toolbar is consistent.** The same actions sit in the same place across modules.

READ AS Screens are captured from the walkthrough video at the timestamp shown on each step. Company names, policy numbers and dollar values are demonstration data.

Access levels

What each level unlocks.

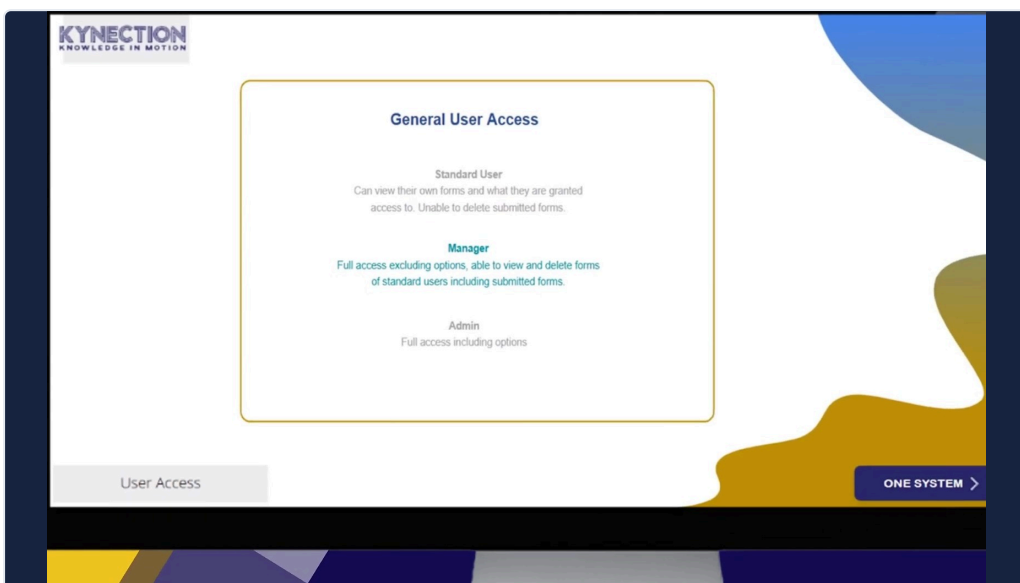


STEP 1 • 00:15 IN THE VIDEO

Understand the levels

Standard, Manager and Admin access levels each expose different modules and permissions.

CHAPTER 01 • STEP 1 OF 2



STEP 2 • 00:28 IN THE VIDEO

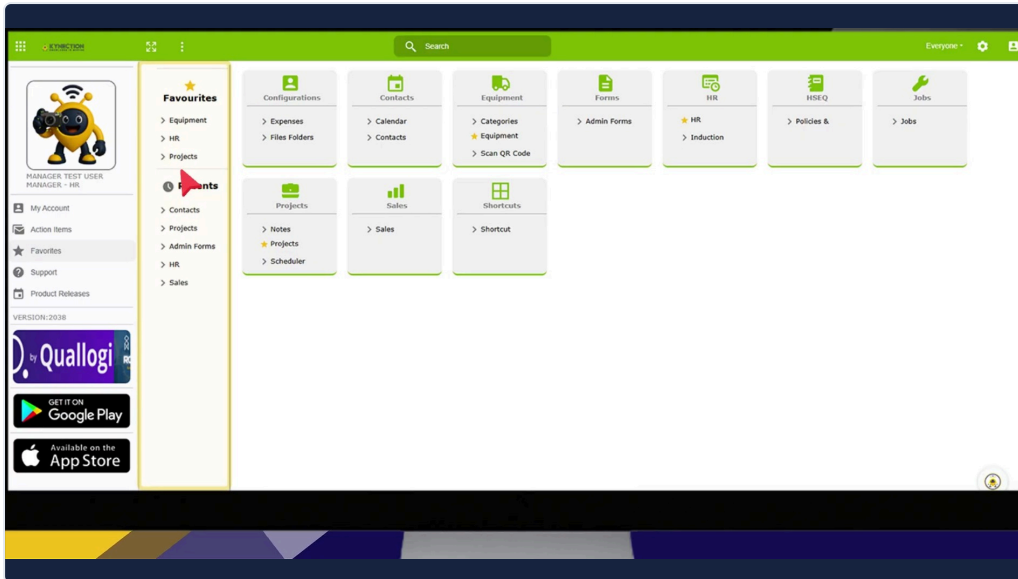
Know your level

Which level you hold explains most of what you can and cannot see.

CHAPTER 01 • STEP 2 OF 2

Dashboard and toolbar

Getting around quickly.

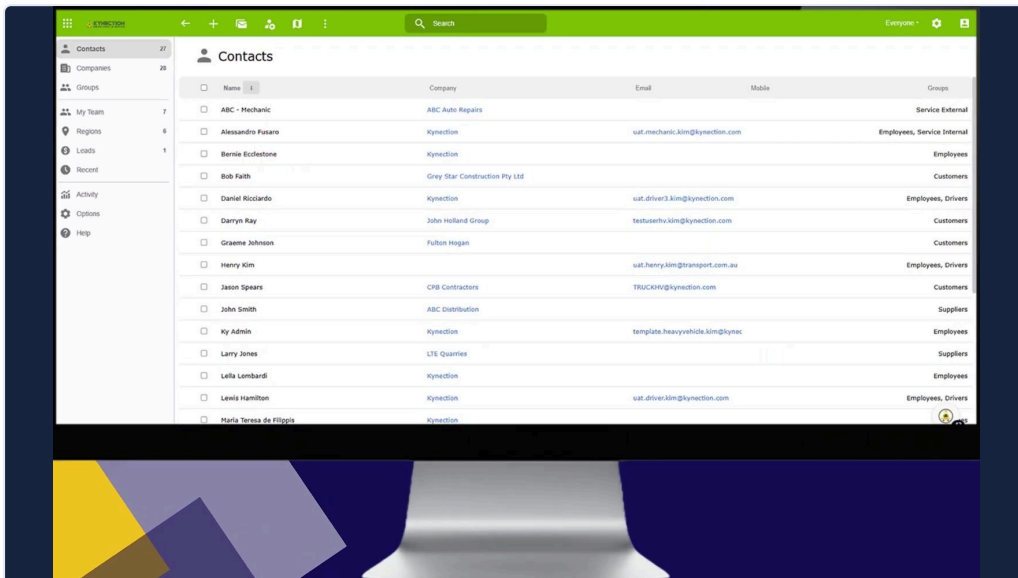


STEP 1 • 00:56 IN THE VIDEO

Read the dashboard

The dashboard carries your modules with favourites and recents.

CHAPTER 02 • STEP 1 OF 2



STEP 2 • 01:20 IN THE VIDEO

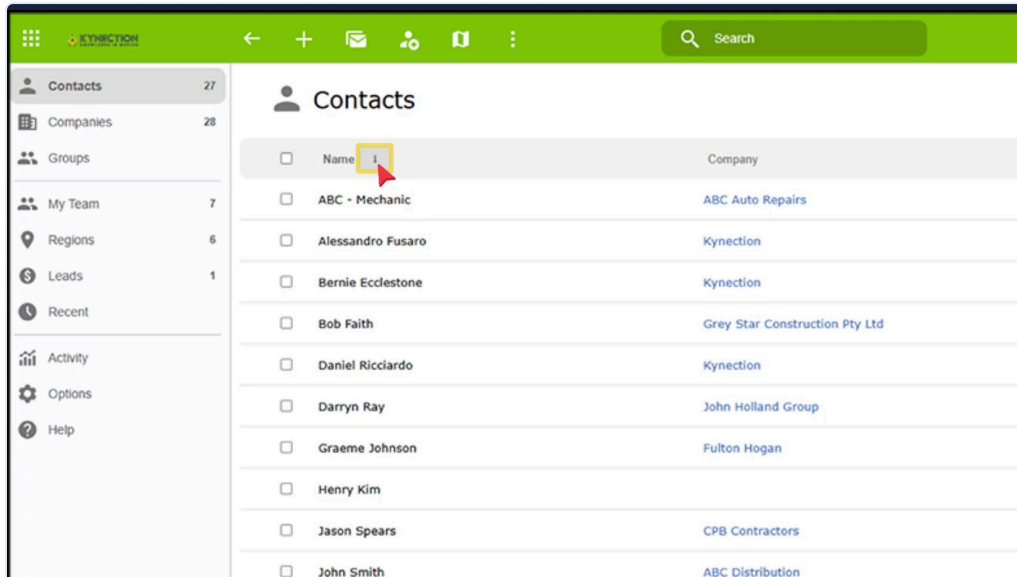
Use the toolbar

The common toolbar options repeat across modules.

CHAPTER 02 • STEP 2 OF 2

Contacts and forms

The two record sets a manager touches most.

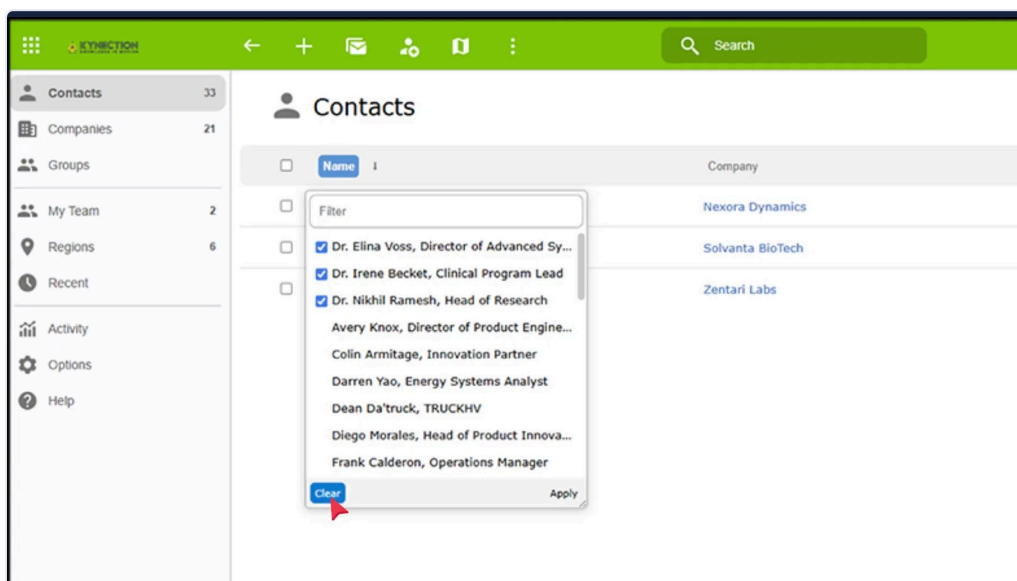


STEP 1 • 01:30 IN THE VIDEO

Open contacts

Contacts lists everyone in the system with their company and role.

CHAPTER 03 • STEP 1 OF 3



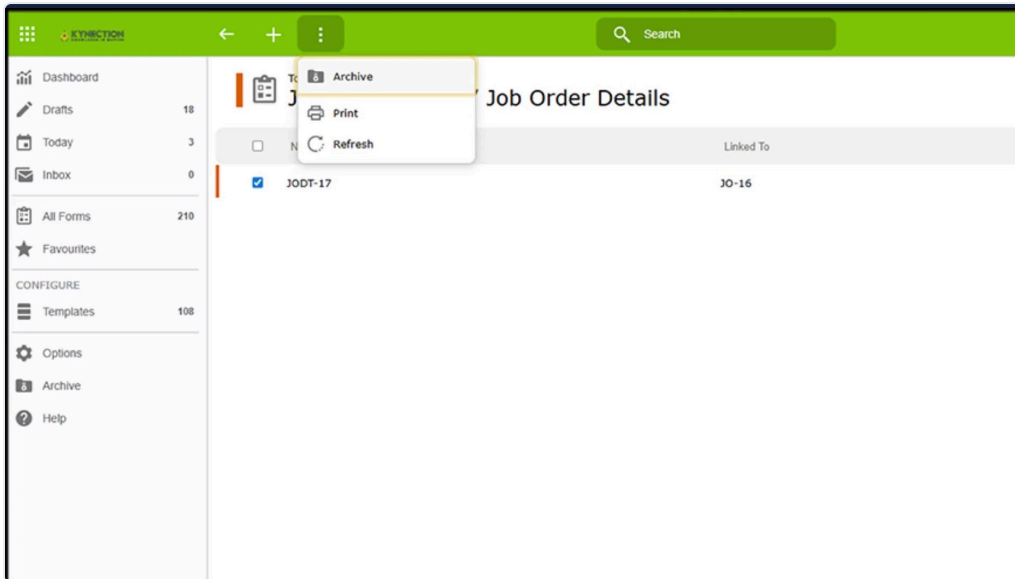
STEP 2 • 01:57 IN THE VIDEO

Filter the records

Filters narrow a large contact list by the fields that matter to you.

CHAPTER 03 • STEP 2 OF 3

Contacts and forms



STEP 3 • 02:17 IN THE VIDEO

Reach forms and the archive

Forms and the archive are reached from the same navigation.

CHAPTER 03 • STEP 3 OF 3

Where to go next

This guide covers one part of the module. The rest of the series covers it end to end.

NEXT UP - KIM 03

Manage forms, records and data exports

BACK TO KIM 01

Use Kynecton as a manager user (module overview)

THE REST OF THE KIM SERIES

Ask your Kynecton account manager for the other guides in this series

MORE IN THIS MODULE

KIM 01 Use Kynecton as a manager user (module overview)

KIM 03 Manage forms, records and data exports

KIM 04 Import data and submit a support request
