

Assigning CRM bolt-ons to users

In order for agents to make use of CRM features a bolt-on must be provisioned and assigned to them. Bolt-ons are provisioned through the Gamma Portal and they can be assigned to the required users via Horizon.

Note: This article focuses on assigning bolt-ons in Horizon. For help provisioning bolt-ons please refer to the **Horizon Accreditation on the Gamma Academy**.

Assigning bolt-ons to existing users

1. Log into your Horizon company
2. Select the **Users tab**
3. Click **edit** next to the relevant user
4. Select the **Services tab**
5. In Optional Extras, **tick the checkbox** next to the relevant bolt-on
6. Click **Save**
7. The bolt-on will be assigned to the user

Assigning bolt-ons when creating users

1. Log into your Horizon company
2. Select the **Users tab**
3. Click **Add**
4. Fill in the users details and progress to the **Assign Services** section
5. In Optional Extras, **tick the checkbox** next to the relevant bolt-on
6. Continue with the **user creation**
7. The user will be created and the bolt-on assigned

Contact Configuration

Once the user is saved with a bolt-on, they will automatically be assigned with an agent role in Horizon Contact which enables them with the CRM bolt-on. The user will then be able to log into the Horizon Contact integration window with the selected CRM.