

## CustomerSource new user setup:

The default person assigned as the administrator for your company CustomerSource profile will be the Individual who was listed when your Dynamics GP system was originally ordered. This is done automatically by Microsoft.

You can set up as many Individuals in your company as you would like to have access to the CustomerSource web site. It is required for you to have at least one Administrator but you can choose to have several if you would prefer. A person set up as an administrator will be able to add or delete other user accounts within CustomerSource. No other privileges are given to an administrator. It is recommend that each person in your company that will be accessing the site be set up with an Individual user account.

Note: You must use Internet Explorer when using the CustomerSource web site for it to function properly.

- Hover over “**Accounts**” on the left navigation bar
- Click “**My customersource accounts**”
  - This will show a list of all of the individuals currently set up with a CustomerSource account.
  - If they are already set up but have never accessed the site click on their name and then click “**Link Windows Live ID button**”. This will automatically send out an email for them to access their account. All emails show as being sent from **voice@microsoft.com**
- Click “**Add new professional**”
  - Enter the user’s information.
  - First name, last name, email, and Local Site Preference. This should be set to “**Global English**” for their profile in the CustomerSource site to be set up correctly. Then set the preferred language to “**English (US)**”
- Enter a “**Role**” for this user depending on their job function within your company. (This is optional and a Role is not a requirement for a user to be set up)
- Change the next options to “yes” or “no” depending on your/their preference.
- Set the “Administrator” field to “yes” or “no”. (See notes above.)
- Click the box titled “**Send an invitation email to set up account**”. This will automatically send an email to the individual including a hyperlink that will need to be used to complete their user set up.
- The user will receive an email that will come from “**voice@microsoft.com**”.
  - If they were set up as an Administrator they will receive two emails; one to complete the set up and one containing a Voice Administrator User Guide with instructions on how to add, delete, or edit users.
  - The second will be the invitation email that will include two hyperlinks. One to set up a Windows Live ID and the other to associate your email with your CustomerSource account.

- To set up a Windows Live ID click on the first hyperlink on the email.
- Choose “**yes use my email address**” then continue.
- Enter your email address and set your password for the site
- Create your password reset option using a secret answer options.
- Enter the special characters in the field and click continue
- Enter you email address again to accept the terms and click accept.
- Then click continue.
  - You will receive two more emails with information about your new Windows Live ID accounts. These emails can be discarded and will not be needed for the CustomerSource set up.
- Open a new browser window and go to:  
<http://www.microsoft.com/dynamics/en/us/customersource.aspx>
- Scroll down to step #4, “**Sign in to CustomerSource**”.
- Enter your email address to Associate your Account with your company and click continue
- You will receive another email from “**Voice@microsoft.com**” containing a hyperlink to use to complete the set up.
- Once you click the link and have successfully associated your account you can click “**CustomerSource**” on the left navigation screen to log into the site.