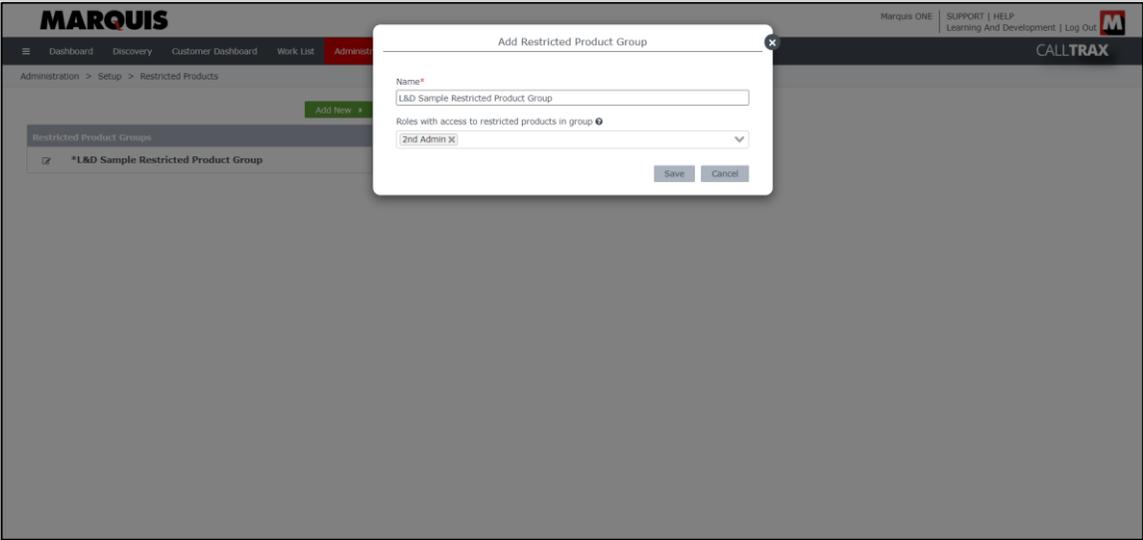
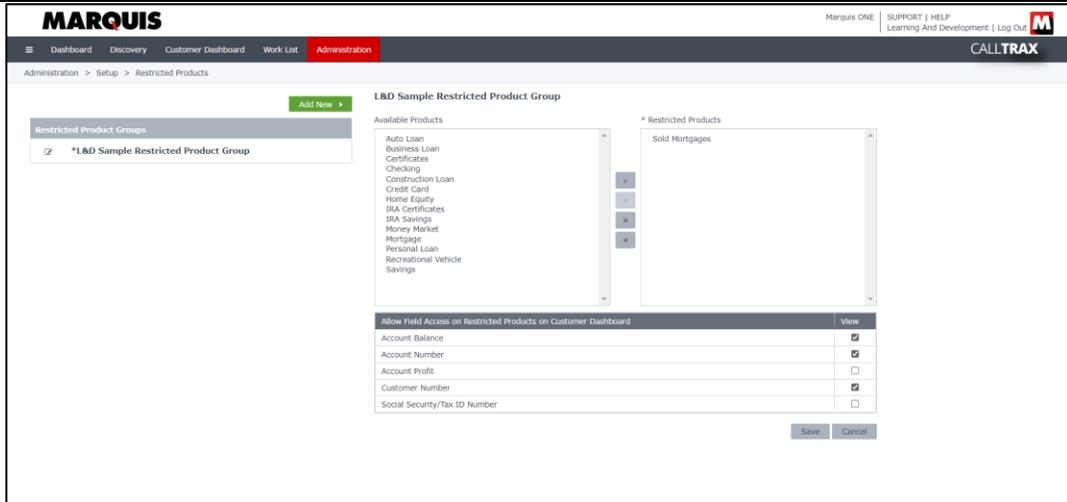


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CLTX1001	CallTrax NEXT Creating Restricted Product Groups
	The following procedures will guide through creating Restricted Product Groups designed to prevent the visibility of secure data fields for selected products. Within the setup, you will have the ability to assign select roles that should still be able to view the secure data for those products and identify which secure data fields they can see.
Order of Steps	Tasks
Step 1	Log into CallTrax NEXT
Step 2	On the landing page, click on Administration from the main menu
Step 3	Hover over CallTrax Settings
Step 4	Click on the Restricted Products sub-category
Step 5	To add a new Restricted Product Group, click the green Add New button
5.1	Enter a Name for the Restricted Product Group
5.2	If desired, use the drop-down arrow to select those Roles that should retain access to the products that will be selected within the group
5.3	Click Save
	
Step 6	Select the desired Products to be restricted:
6.1	To select an individual product , double click on the product within the list
6.2	To select more products at once, hold down the CTRL button and click on each product to highlight them
6.3	Click the single right arrow
Step 7	If desired, select the desired data fields that can be visible to those Roles given access to the restricted products
7.1	Click in the View box to place a check mark next to the desired field(s)

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Step 8 Click **Save**

Step 9 To edit the selected **Roles** or **Name**, click the **edit**  icon to the left of the group name

9.1 Make the desired changes and click **Save**

Step 10 To **edit** the selected **products**, click the name of the group within the list

10.1 **Double click** an individual product to add or remove it from the Restricted Products list

10.2 Use the **checkboxes** to enable or disable the visibility of select fields on the restricted products

10.3 Click **Save** to retain any changes

Step 11 To **delete** the Restricted Product Group, click the name of the group within the list

11.1 Click the **Delete** button located at the bottom of the window

11.2 Click **Yes** to the confirmation message

