



## Enterprise Dashboard Training

16-Week Program

# ENTERPRISE ACADEMY

*So Your Business Can...  
Boldly Go Where  
No Business Has  
Gone Before!*

### • XpanZion Dashboard Intro

Exercise 1 of 16

#### **Signing In**

- 1) Go to the domain for your website
- 2) Click Sign in in the upper right
- 3) Enter your First Name (all lowercase) in Email box
- 4) Enter your Password
- 5) Click Continue

**Note:** You will be directed to the Leads Menu in your Sales Module where you will see who has contacted you through your website. From there you can navigate the back office or select website to go to the public side.

#### **Getting Started – Logo & Company Data**

- 1) Select Settings from the top menu (can be found under More)
- 2) Select General Settings from the left menu
- 3) Click the top link: Configure your company data
- 4) Click Edit
- 5) Enter or update your company name if required
- 6) Enter company details – include only the address details that you want visible on your website
- 7) Click the pencil edit icon in the logo box in the upper left to upload logo
- 8) Click Save

#### **General Settings**

- 1) Go back to General Settings
- 2) Activate Developer Mode to access additional features: Click on your name profile in the upper right and select About
- 3) Click the Activate the developer mode link
- 4) Set the following options:
  - A) Click to check the box: Enable password reset from login page
  - B) Click to check the box: Allow external users to sign up
  - C) Select your timezone if it is not already set
  - D) Select Website Sales as the Contact Form Sales Team
  - E) Select yourself or your sales manager as the Contact Form Salesperson
- 5) Click Apply in the upper left

Welcome to your XpanZion Enterprise Dashboard!

The first step is to get signed in to your dashboard so you can complete the training.

Refer to your email inbox for the message we sent with your signin credentials, or Contact the IDSP Enterprise Academy team for help getting signed in.  
**505-265-9190**

For assistance getting your email notifications, website inbox and contact form functioning, Contact the Enterprise Academy team.  
**505-265-9190**

For Developer Mode – Click your Profile in the upper right, Select About, Click Activate the developer mode. This will allow for more options for user permissions under Users in the left menu