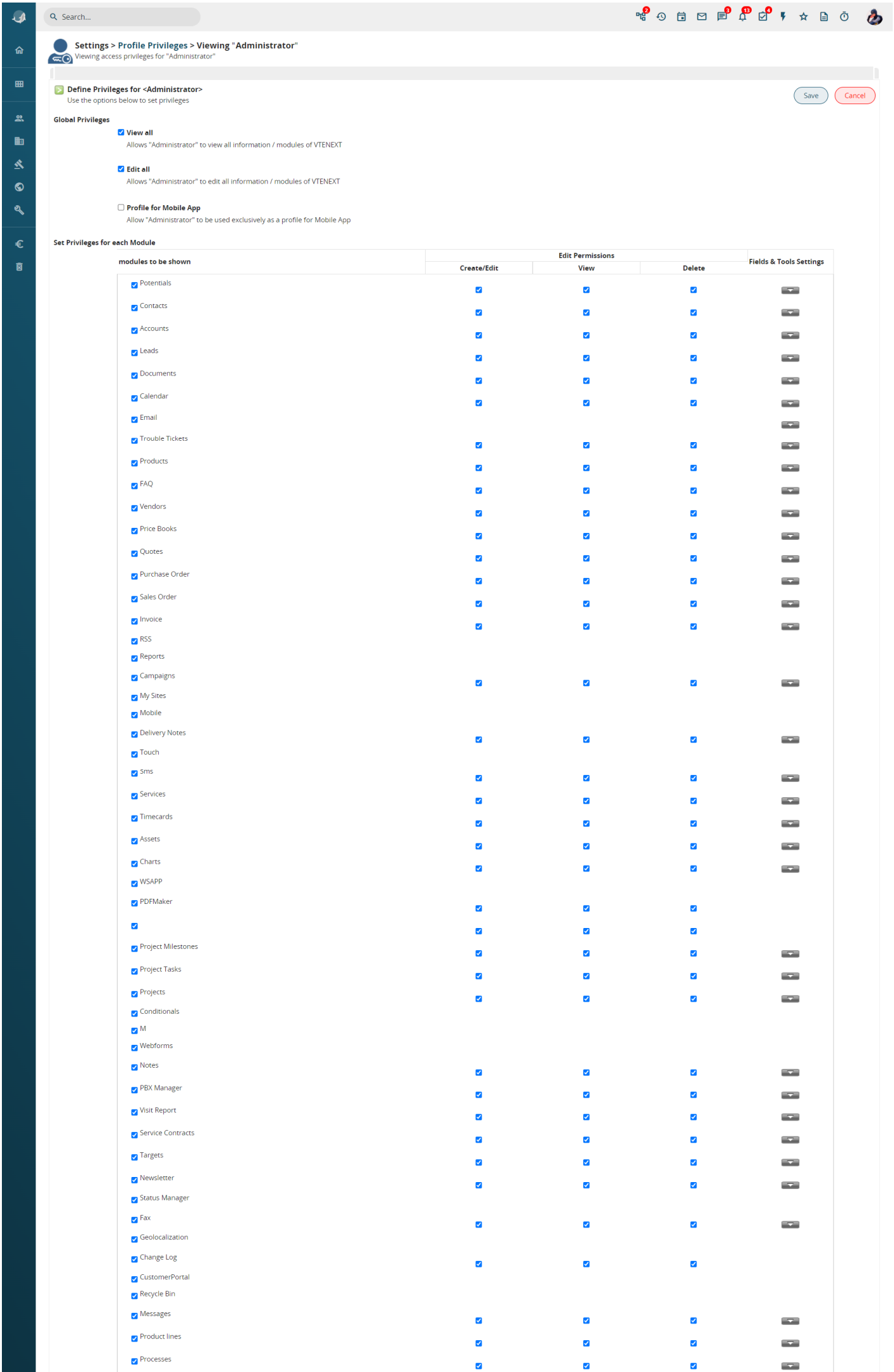
16.1 Profiles

The profile defines the privileges of a user in regard to access to, and use of, vtenext modules and fields. The administrator, as instructed by company managers, must determine the operations that can be performed by the different users who will work on the CRM.

The following are established for each user by Profiles:

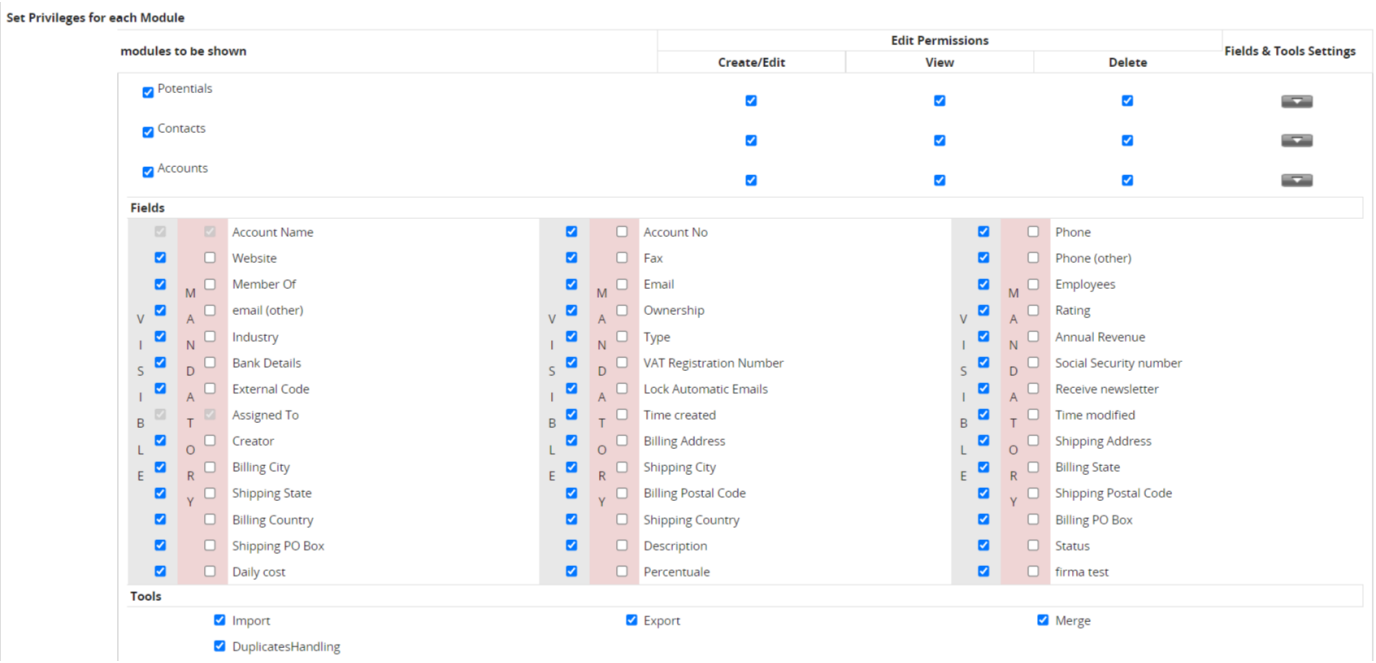
- which modules appear in their general menu;
- which modules they have full access to;
- which modules they have limited access to;
- which fields within a module the user will be able to see and/or modify and/or delete their content.

And more, on a scale of increasing detail.
Below are the types of privileges shown on the screen:


Search...
Settings > Profile Privileges > Viewing "Administrator"
Viewing access privileges for "Administrator"
Define Privileges for <Administrator>
Use the options below to set privileges
Save
Cancel
Global Privileges
View all
Allows "Administrator" to view all information / modules of VTENEXT
Edit all
Allows "Administrator" to edit all information / modules of VTENEXT
Profile for Mobile App
Allow "Administrator" to be used exclusively as a profile for Mobile App
Set Privileges for each Module
modules to be shown
Edit Permissions
Create/Edit
View
Delete
Fields & Tools Settings
Potentials
Contacts
Accounts
Leads
Documents
Calendar
Email
Trouble Tickets
Products
FAQ
Vendors
Price Books
Quotes
Purchase Order
Sales Order
Invoice
RSS
Reports
Campaigns
My Sites
Mobile
Delivery Notes
Touch
Sms
Services
Timecards
Assets
Charts
WSAPP
PDFMaker
Project Milestones
Project Tasks
Projects
Conditionals
M
Webforms
Notes
PBX Manager
Visit Report
Service Contracts
Targets
Newsletter
Status Manager
Fax
Geolocalization
Change Log
CustomerPortal
Recycle Bin
Messages
Product lines
Processes

Global Privileges:

- See all: the profile will be able to read all CRM information;
- Edit all: the profile will be able to edit all CRM information.
- Field Privileges: allows you to decide whether the user can create/view/modify/delete within the single module.
- Tools: allows you to decide on functions such as Export/Import Data, Convert Lead, Management of duplicates with merging.



When creating a new profile, you can start from the basic structure of an existing one by duplicating it, so as to not start from scratch. We suggest creating more limited profiles first and then proceed to the more open ones (adding new permissions each time).

Note. The access privileges managed by Profiles refer to the vtenext layout, not to the "ownership" of the content.

If, for example, I have to set that Agent 1 does not see Agent 2's contacts, this type of management is performed by Roles and Sharing Access (see next paragraphs).

Since both agents work with the Contacts module, their profile (which will most likely be shared) will have the Contacts module enabled to read and at least create/edit.

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