




16.1.1 Create new profile




STEP 1: Once on Settings > Profiles, press New Profile:

**Settings > Profiles**
Manage user-specific modules access to different Roles


Profiles List
Total : 2 Profiles

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New Profile

#	Tools	Profile Name	Description	Mobile
1		Administrator	Admin Profile	
2	 	Sales Profile	Profile Related to Sales	

STEP 2: in the configuration window for the new profile, enter the name, description if any, and the basic profile to start from.

**Settings > Profile Privileges**
Manage user-specific modules access to different Roles

Step 1 of 2 : Welcome to Privilege Profile Creator
Select how to create the new profile

* Profile Name :

Description :

☒ I would like to setup a base profile and edit privileges (Recommended)
Base Profile:

(OR)

☐ I will choose the privileges from scratch (Advanced Users)

Next >

Cancel

STEP 3: Enter the access privileges in detail for each module:

Use the options below to set privileges

Global Privileges

[View all](#)




Allows "New Profile" to view all information / modules of VTENEXT

☒ [Edit all](#)

Allows "New Profile" to edit all information / modules of VTENEXT

☐ Profile for Mobile App

Allow "New Profile" to be used exclusively as a profile for Mobile App

Set Privileges for each Module											
modules to be shown				Edit Permissions						Fields & Tools Settings	
				Create/Edit	View		Delete				
<input checked="" type="checkbox"/>	Potentials			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	Contacts			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	Accounts			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Fields											
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Account Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Account No	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Phone
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Fax	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Phone (other)
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Member Of	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Email	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Employees
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	email (other)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Ownership	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Rating
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Industry	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Type	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Annual Revenue
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bank Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	VAT Registration Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Social Security number
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	External Code	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Lock Automatic Emails	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Receive newsletter
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Assigned To	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Time created	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Time modified
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Creator	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Billing Address	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Shipping Address
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Billing City	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Shipping City	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Billing State
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Shipping State	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Billing Postal Code	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Shipping Postal Code
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Billing Country	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Shipping Country	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Billing PO Box
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Shipping PO Box	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Description	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Status
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Daily cost	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Percentage	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	firma test
Tools											
<input checked="" type="checkbox"/>	Import			<input checked="" type="checkbox"/>	Export			<input checked="" type="checkbox"/>	Merge		
<input checked="" type="checkbox"/>	DuplicatesHandling										

Mobile App Profile: it allows to create a profile for the mobile app. For each profiles created, as it happens with the web profiles, is possible to choose the modules and their utilization methods. Below important advices to set correctly a new profile:

- activate "touch" module for a correct use of the mobile app;
- after every single modification/creation of a new profile press "Recalculate" in the Shares Access area;
- after eventual modification/creation of a new profile please logout and login from the application.



Warning! The limitations imposed by the profile on the single module are secondary to those defined by the Module Manager (see relevant paragraph). That is: if the administrator user

deactivates a module from the Module Manager, it will be "turned off" to all users/profiles/roles of the CRM, even if their profile is enabled. Vice versa, if the module is left active in the Module Manager, it is the user profile that determines the presence of limitations.

In the same way, the Layout Editor "prevails" over the Profile when deactivating fields: if the Source field is deactivated by the administrator in the Layout Editor of the Leads module, no profile will be able to display it regardless of the relative tick in the box.

Versioning:

All settings for modules, processes, roles and profiles can be saved, generating a version (e.g. v.1.0). Versions can be exported or imported to ensure a higher level of security during setup.

v. 1.0  

New Profile

	Mobile

Revision #1

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