

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:

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"/> Contacts	<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"/> Leads	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> Documents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> Calendar	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> Email				
<input checked="" type="checkbox"/> Trouble Tickets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> Products	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> FAQ	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> Vendors	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> Price Books	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> Quotes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> Purchase Order	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> Sales Order	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> Invoice	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> RSS				
<input checked="" type="checkbox"/> Reports				
<input checked="" type="checkbox"/> Campaigns	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> My Sites				
<input checked="" type="checkbox"/> Mobile				
<input checked="" type="checkbox"/> Delivery Notes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> Touch				
<input checked="" type="checkbox"/> Sms	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> Services	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> Timecards	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> Assets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> Charts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> WSAPP				
<input checked="" type="checkbox"/> PDFMaker	<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"/>	
<input checked="" type="checkbox"/> Project Milestones	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> Project Tasks	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> Projects	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> Conditionals				
<input checked="" type="checkbox"/> M				
<input checked="" type="checkbox"/> Webforms				
<input checked="" type="checkbox"/> Notes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> PBX Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> Visit Report	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> Service Contracts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> Targets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> Newsletter	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> Status Manager				
<input checked="" type="checkbox"/> Fax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> Geolocalization				
<input checked="" type="checkbox"/> Change Log	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> CustomerPortal				
<input checked="" type="checkbox"/> Recycle Bin				
<input checked="" type="checkbox"/> Messages	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> Product lines	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/> Processes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

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.

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"/> Contacts		<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"/>	

Fields

<input checked="" type="checkbox"/> Account Name	<input checked="" type="checkbox"/>	<input type="checkbox"/> Account No	<input checked="" type="checkbox"/>	<input type="checkbox"/> Phone
<input checked="" type="checkbox"/> Website	<input checked="" type="checkbox"/>	<input type="checkbox"/> Fax	<input checked="" type="checkbox"/>	<input type="checkbox"/> Phone (other)
<input checked="" type="checkbox"/> Member Of	<input checked="" type="checkbox"/>	<input type="checkbox"/> Email	<input checked="" type="checkbox"/>	<input type="checkbox"/> Employees
<input checked="" type="checkbox"/> email (other)	<input checked="" type="checkbox"/>	<input type="checkbox"/> Ownership	<input checked="" type="checkbox"/>	<input type="checkbox"/> Rating
<input checked="" type="checkbox"/> Industry	<input checked="" type="checkbox"/>	<input type="checkbox"/> Type	<input checked="" type="checkbox"/>	<input type="checkbox"/> Annual Revenue
<input checked="" type="checkbox"/> Bank Details	<input checked="" type="checkbox"/>	<input type="checkbox"/> VAT Registration Number	<input checked="" type="checkbox"/>	<input type="checkbox"/> Social Security number
<input checked="" type="checkbox"/> External Code	<input checked="" type="checkbox"/>	<input type="checkbox"/> Lock Automatic Emails	<input checked="" type="checkbox"/>	<input type="checkbox"/> Receive newsletter
<input checked="" type="checkbox"/> Assigned To	<input checked="" type="checkbox"/>	<input type="checkbox"/> Time created	<input checked="" type="checkbox"/>	<input type="checkbox"/> Time modified
<input checked="" type="checkbox"/> Creator	<input checked="" type="checkbox"/>	<input type="checkbox"/> Billing Address	<input checked="" type="checkbox"/>	<input type="checkbox"/> Shipping Address
<input checked="" type="checkbox"/> Billing City	<input checked="" type="checkbox"/>	<input type="checkbox"/> Shipping City	<input checked="" type="checkbox"/>	<input type="checkbox"/> Billing State
<input checked="" type="checkbox"/> Shipping State	<input checked="" type="checkbox"/>	<input type="checkbox"/> Billing Postal Code	<input checked="" type="checkbox"/>	<input type="checkbox"/> Shipping Postal Code
<input checked="" type="checkbox"/> Billing Country	<input checked="" type="checkbox"/>	<input type="checkbox"/> Shipping Country	<input checked="" type="checkbox"/>	<input type="checkbox"/> Billing PO Box
<input checked="" type="checkbox"/> Shipping PO Box	<input checked="" type="checkbox"/>	<input type="checkbox"/> Description	<input checked="" type="checkbox"/>	<input type="checkbox"/> Status
<input checked="" type="checkbox"/> Daily cost	<input checked="" type="checkbox"/>	<input type="checkbox"/> Percentuale	<input checked="" 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		

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.