

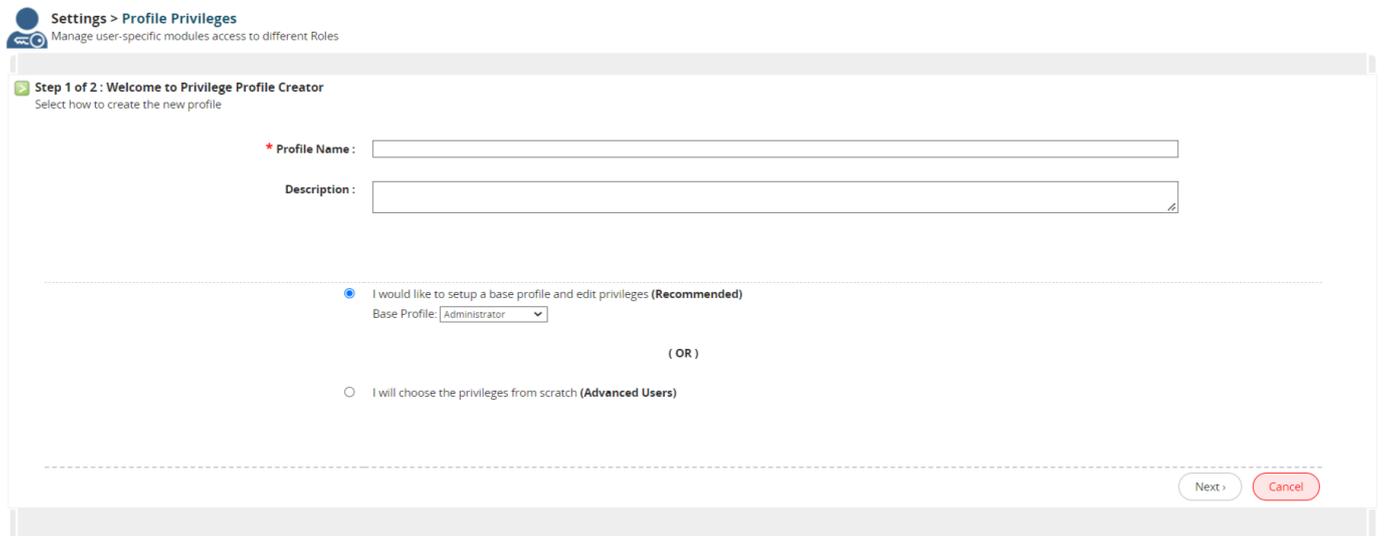
16.1.1 Create new profile

STEP 1: Once on Settings > Profiles, press 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.



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:

Step 2 of 2 : Define Privileges for <New Profile>

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