




# 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"/> 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										
V I S I B L E	<input checked="" type="checkbox"/>	<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"/>	<input type="checkbox"/>	Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Fax	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Phone (other)	
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Member Of	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Email	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Employees	
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	email (other)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Ownership	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Rating	
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Industry	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Type	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Annual Revenue	
	<input checked="" type="checkbox"/>	<input 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"/>	<input 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"/>	<input 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"/>	<input 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"/>	<input type="checkbox"/>	Billing City	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Shipping City	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Billing State	
V I S I B L E	<input checked="" type="checkbox"/>	<input 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"/>	<input 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"/>	<input 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"/>	<input type="checkbox"/>	Daily cost	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Percentage	<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										

**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  
Created 2 September 2024 07:59:08 by Admin  
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