

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:

vtnext

Home

Modules

User permissions

Users

Roles

Profiles

Groups

Sharing Access

Fields Access

Advanced Sharing Access

Audit Trails

User Login History

Check User Login

Business Process Manag...

Process manager

Basic workflows

Mail Converter

Synchronizations

Search...

Collapse

Search...

Settings > Profiles > Administrator

Manage user-specific modules access to different Roles

Save

Cancel

Define Privileges for <Administrator>

Use the options below to set privileges

Global Privileges

☒ View all

Allows "Administrator" to view all information / modules of VTENEXT

☒ Edit all

Allows "Administrator" to edit all information / modules of VTENEXT

Set Privileges for each Module

	MODULES TO BE SHOWN	EDIT PERMISSIONS			FIELDS & TOOLS SETTINGS
		CREATE/EDIT	VIEW	DELETE	
☒		☒	☒	☒	
☒	Accounts	☒	☒	☒	▼
☒	Assets	☒	☒	☒	▼
☒	Calendar	☒	☒	☒	▼
☒	Campaigns	☒	☒	☒	▼
☒	Cases	☒	☒	☒	▼
☒	Change Log	☒	☒	☒	
☒	Charts	☒	☒	☒	▼
☒	Conditionals				
☒	Configurable products	☒	☒	☒	▼
☒	Contacts	☒	☒	☒	▼
☒	CustomerPortal				
☒	Delivery Notes	☒	☒	☒	▼
☒	Documents	☒	☒	☒	▼
☒	Employees	☒	☒	☒	▼
☒	FAQ	☒	☒	☒	▼
☒	Fax	☒	☒	☒	▼
☒	Folders	☒	☒	☒	▼
☒	Geolocalization				
☒	Invoice	☒	☒	☒	▼
☒	Job Orders	☒	☒	☒	▼
☒	Klondie Topic	☒	☒	☒	▼
☒	Leads	☒	☒	☒	▼
☒	M				
☒	Messages	☒	☒	☒	▼
☒	Messages (Compose)				
☒	Mobile				
☒	Mobile Scans	☒	☒	☒	▼
☒	My Sites				
☒	Newsletter	☒	☒	☒	▼
☒	Notes	☒	☒	☒	▼
☒	PBX Manager	☒	☒	☒	▼
☒	PDAPLugin				
☒	PDFMaker	☒	☒	☒	
☒	Potentials	☒	☒	☒	▼
☒	Price Books	☒	☒	☒	▼
☒	Processes	☒	☒	☒	▼
☒	Product lines	☒	☒	☒	▼
☒	Products	☒	☒	☒	▼
☒	Project Milestones	☒	☒	☒	▼
☒	Project Tasks	☒	☒	☒	▼
☒	Projects	☒	☒	☒	▼
☒	Purchase Order	☒	☒	☒	▼
☒	Quotes	☒	☒	☒	▼
☒	RSS				
☒	Recycle Bin				

Global Privileges:

- See All: the profile will have read access to all information in the CRM. This means that when the **SEE ALL** option is enabled, it overrides all other conditions. So, if a profile has this option active, the user can view all records in all modules, even if they are set to private shared access.
- 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	
☒		☒	☒	☒	
☒	Accounts	☒	☒	☒	▼
☒	Assets	☒	☒	☒	▼

FIELDS

V

☒

M

☐

Asset No

I

☒

A

☒

Date Sold

S

☒

N

☐

Invoice Name

I

☒

D

☐

Customer Name

B

☒

A

☐

Sales Order

L

☒

T

☐

V

☒

M

☒

Product Name

I

☒

A

☒

Date in Service

S

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N

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Assigned To

I

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D

☐

Created Time

B

☒

A

☐

Creator

L

☒

T

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V

☒

M

☒

Serial Number

I

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A

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Status

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Asset Name

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D

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Modified Time

B

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A

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Notes

L

☒

T

☐

TOOLS

☒ Import

☒ Export

☒ 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.