

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: 3 Profiles

Pending changes... Save (v. 1.4)



New Profile

TOOLS	PROFILE NAME	DESCRIPTION
	Administrator	Admin Profile
 	Manager	Manager Profile
 	Agent	Agent Profile

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

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

Next >Cancel

Step 1 of 2: Welcome to Privilege Profile Creator

Select how to create the new profile

* Profile Name

Description

Base Profile:

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

Base Profile:Administrator

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

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

Use the options below to set privileges

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



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

MODULES TO BE SHOWN				EDIT PERMISSIONS			FIELDS & TOOLS SETTINGS							
				CREATE/EDIT	VIEW	DELETE								
☒				☒	☒	☒								
☒	Accounts			☒	☒	☒								
FIELDS														
V	☒	M	☒	Account Name	V	☒	M	☐	Account No	V	☒	M	☐	Phone
I	☒	A	☐	Website	I	☒	A	☐	Phone (other)	I	☒	A	☐	Member Of
S	☒	N	☐		S	☒	N	☐		S	☒	N	☐	Rating
I	☒	D	☐	Email	I	☒	D	☐	Employees	I	☒	D	☐	Annual Revenue
B	☒	A	☐	Industry	B	☒	A	☐	Type	B	☒	A	☐	Social Security number
L	☒	T	☐		L	☒	T	☐		L	☒	T	☐	Receive newsletter
E	☒	O	☐	Bank Details	E	☒	O	☐	VAT Registration Number	E	☒	O	☐	Time modified
	☒	R	☐	External Code		☒	R	☐	Lock Automatic Emails		☒	R	☐	Shipping Address
	☒	Y	☐	Assigned To		☒	Y	☐	Time created		☒	Y	☐	Billing State
	☒		☒	Creator		☒		☐	Billing Address		☒		☐	Shipping Postal Code
	☒		☐	Creator		☒		☐	Shipping City		☒		☐	Description
	☒		☐	Billing City		☒		☐	Billing Postal Code		☒		☐	SDI
	☒		☐	Shipping State		☒		☐	Shipping Country		☒		☐	Stato azienda
	☒		☐	Billing Country		☒		☐	PEC		☒		☐	
	☒		☐	Daily cost		☒		☐	Tipo gestione		☒		☐	
	☒		☐	La mia tabella		☒		☐			☒		☐	
TOOLS														
☒	Import			☒	Export			☒	Merge					
☒	DuplicatesHandling													

- 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.

- 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.

Pending changes... Save (v. 1.4)

↓

↑

New Profile

Revision #1

Created 2026-07-06 15:07:47 UTC by Admin

Updated 2026-07-06 15:07:47 UTC by Admin