How to apply permissions to users?

The application manager can allow or restrict the access of each user to the different options available in the application.

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Permissions can be assigned individually or to groups. These groups are created by the system administrator.

To apply permissions to an individual user, take the following steps:

1. At the footer of the application, click '**Users**';

2. Create a new user or select an existing one;

3. In the user file, go to the '**Permissions**' section;

4. Select the permissions that the user will have in the different areas of the application;

Note: Even if the '**List**' option is not selected the user can always view Opportunities / Properties/Contacts/Tasks and Leads that are his responsibility.

Settings:

- **Edit:** Allows the user to edit the overall settings of the software;
- **Manage Origin /Sub Origin:** Allows the user to manage the origin and sub origin of the opportunities;
- **Manage payments:** Allows the user to manage payments;
- **List:** Allows the user to view list of properties/contacts;
- **Profile:** Allows the user to manage user profiles.
- **Barómetro:** Allows the user to view the Barómetro of Casa Sapo;

Contacts:

- **Add Note:** Allows the user to add notes to contact records;
- **Delete Note:** Allows the user to delete notes from contact records;
- **Edit Note:** Allows the user to edit notes from the contact records;
- **Edit:** Allows the user to edit contact records;
- **Export to sites:** Allows the user to define contacts to be exported;
- **Merge or Delete:** Allows the user to delete contacts or merge two duplicated contacts;
- **Import contacts from Google:** Allows you to import contacts from your Google account.
- **Insert:** Allows the user to add new contacts;
- **List:** Allows the user to view the list of contacts;
- **Synchronize:** Allows the user to synchronize contacts with your Gmail account;

Tags:

- **Manage:** Allows the user to create / edit / delete tags;
- **List:** Allows the user to view properties / contacts associated to the selected tag

Property:

- **Access to prospecting for properties:** Allows the user to have access to the eGO prospecting for properties tab;
- **Add Note:** Allows the user to add notes to properties;
- **Delete Note:** Allows the user to delete notes of properties;
- **Delete:** Allows the user to delete properties;
- **Fast edit:** Allows the user to make quick edits;
- **Edit Commissions:** Allows the user to edit commissions for each property;
- **Edit current account:** Allows the user to edit the current account of a property;
- **Edit private data:** Allows the user to edit the fields of the '**Private Data**' section of a property;
- **Edit Availability:** Allows the user to edit the availability of a property (In evaluation / available / Reserved / etc.);
- **Edit Note:** Allows the user to edit notes of a property;
- **Edit by associations:** Allows the user to edit properties when the type of user is a Broker or salesman;
- **Edit reference:** Edit the references of properties;
- **Edit:** Allows the user to edit the fields of a property;
- **Statistics:** Allows the user to see the statistics of a property;
- **Export to sites:** Allows the user to set properties for exportation;

- **Export Property Details:** Allows the user to export the details of the property;
- **Manage keys:** Allows the user to manage the keys related to a property;
- **Insert:** Allows the user to add properties;
- **List current account:** Allows the user to view the current account of a property;
- **List:** Allows the user to view the list of properties.

Lead:

- **Delete:** Allows the user to delete Leads;
- **Edit:** Allows the user to edit Leads;
- **List:** Allows the user to view a list of Leads.

Newsletters:

- **Delete:** Allows the user to delete Newsletters;
- **Edit:** Allows the user to edit Newsletters;
- **List:** Allows the user to view the list of Newsletters.

Opportunities:

- **Add Note:** Allows the user to add notes to opportunities;
- **Add roadmaps and visits:** Allows the user to add roadmaps of visits to opportunities;
- **Delete Note:** Allows the user to delete notes of opportunities;
- **Edit:** Allows the user to edit opportunities;
- **Edit CPCV:** Allows the user to edit the management of the Promissory Contract of Sale and Purchase;
- **Edit Scriptures:** Allows the user to edit the management of deeds;
- **Edit lead timelines:** Allows the user to edit the steps that are needed to accomplish an opportunity;
- **Edit Financing:** Allows the user to edit the financing management;
- **Edit Note:** Allows the user to edit notes associated to opportunities;
- **Edit Reference:** Allows the user to edit the reference of opportunities;
- **Manage Summary Table:** Allows the user to manage the Leads summary table;
- **Merge or Delete:** Allows the user to delete opportunities or merge two duplicated opportunities;
- **Insert:** Allows the user to add opportunities;
- **List roadmaps and visits:** Allows the user to view the list of roadmaps and visits associated to an opportunity;
- **List:** Allows the user to view the list of opportunities;
- **Passing Stage to Win/Lost:** Allows the user to set the state of opportunities to '**Won**'

or '**Lost**'.

Share:

- **Manage:** Allows the user to share properties between agencies;

Property appraisal or profile:

- **Delete:** Allows the user to delete Property Ratings and Appraisals;
- **Approve:** Allows the user to approve Property Ratings and Appraisals;
- **Edit:** Allows the user to edit the Property Ratings and Appraisals;
- **Manage Property Rating:** Allows the user to assign an internal rating to the property (sale likely, sale hard, etc.);
- **List:** Allows the user to view Property Ratings and Appraisals;

Portfolio:

- **Delete:** Allows the user to delete Portfolios;
- **Edit:** Allows the user to edit Portfolios;
- **Insert:** Allows the user to insert Portfolios;
- **List:** Allows the user to view the list of Portfolios;

Products:

- **Delete:** Allows the user to delete Products;
- **Edit:** Allows the user to edit Products;
- **List:** Allows the user to view the list of Products;

Surveys:

- **Delete answer:** Allows the user to delete the answers of the surveys;
- **Delete:** Allows the user to delete surveys;
- **Edit:** Allows the user to edit surveys;
- **Send:** Allows the user to send surveys;
- **List:** Allows the user to view the list of surveys;

Reports:

- **Access to office reports:** Allows the user to create/view office reports;
- **Access to rentals reports:** Allows the user to create/view rentals reports;
- **Access to contacts reports:** Allows the user to create/view reports related to contacts;
- **Access to property reports:** Allows the user to create/view reports related to properties;
- **Access to newsletters reports:** Allows the user to create/view reports related to

newsletters;

- **Access to opportunities reports:** Allows the user to create/view reports related to opportunities;
- **Access to tasks reports:** Allows the user to create/view reports related to tasks;
- **Access to tickets reports:** Allows the user to create/view reports related to tickets;
- **Edit:** Allows the user to edit existing reports;

Support: Page where you can communicate with technical support by chat or form

- **Delete:** Allows the user to delete requests to technical support;
- **Edit:** Allows the user to edit requests to technical support;
- **List:** Allows the user to view the lists of requests to technical support;

Tasks:

- **Update with Google Calendar:** Allows the user to add Google calendar tasks to eGO;
- **Add Note:** Allows the user to add notes to tasks;
- **Delete Note:** Allows the user to delete notes of tasks;
- **Delete:** Allows the user to delete existing tasks;
- **Edit Note:** Allows the user to edit notes associated to tasks;
- **Edit:** Allows the user to edit tasks;
- **Insert:** Allows the user to add new tasks;
- **List:** Allows the user to view the list of tasks;

Tickets:

- **Delete:** Allows the user to delete Tickets;
- **Edit:** Allows the user to edit other Tickets;
- **Edit lead timelines:** Allows the user to edit Ticket timelines;
- **List:** Allows the user to view the list of Tickets;

Users:

- **Delete:** Allows the user to delete other users;
- **Configure who can see and edit the permissions of records:** Allows the user to set which users have permission to view and edit the '**Permissions**' section;
- **Edit:** Allows the user to edit other users;
- **Insert:** Allows the user to add new users;
- **List:** Allows the user to view the list of users;
- **Follow me:** Allows the user to follow opportunities, properties, contacts, tasks, leads;
- **Files** (sub category of "Users")**:**
    - ○ **Manage files:** Allows the user to manage the files related to opportunities,

properties, contacts, and tasks;

- o **View Contacts files:** Allows the user to view the contact related files;
- o **View file archive:** Allows the user to view the related files;
- o **View Lead files:** Allows the user to view the lead related files;
- o **View Product files:** Allows the user to view the product related files;
- o **View Property files:** Allows the user to view the property related files;
- o **View Rent files:** Allows the user to view the renting related files;
- o **View Vehicle files:** Allows the user to view the vehicle related files;
- **Notifications** (sub category of "Users")**:**
  - o **Manage notifications:** Allows the user to manage notifications;
- **Proposals** (sub category of "Users")**:**
  - o **Delete:** Allows the user to delete proposals/counter proposals of opportunities;
  - o **Edit:** Allows the user to edit proposals/counter proposals of opportunities;
  - o **List:** Allows the user to view a list of proposals/counter proposals of opportunities;

Website:
- o **Manage:** Allows the user to manage the website

5. Finally, click '**Save**';