Academia eGO



Real Estate Software

How to edit the permissions on the Opportunities?

eGO users can authorize or restrict the access of each user to the opportunities.

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It's easier to set the permissions of the opportunities using this option. You can apply the permissions to one or more users.

To do so, take the following steps:

1. In the '**Opportunities**' tab select the opportunity you want to edit;

Opportu	inities Pro	operties	Contacts	Tasks 1	Leads 1527	Rentals	Products/Campaigns	Holiday homes	> More	▶ Manage Website
Find opportunities										
(Group, Responsible, Co-responsible, Status, Who created)									0	
or adv	anced search	h								
293 Op	portunities, a	active, re	cently update	ed.						
Show	Recently up	dated (Ac	tive)	•					First page	Next Last page
Select	Add a tag I	Email Prir	nt Delete Mor	е						
	Sale, CT_	VEN_42	9							
2	Nelson Vic	ente, 07	Dec							
2	Potential c	lient: Ma	nuel José		Pre	ference Pro	operty			
	Phone:				Se	arch availat	ble.			
	Email:									
	add tags									

2. Click 'edit this opportunity';

Opportunities	Properties Contacts	Tasks 1	Leads 1527	Rentals Products/Campaig	ns Holiday homes 🕟	More 🕟 Manage Website
€ Sale, Nelson V	, CT_VEN_429 /icente, received in 07 Decemb	er 2014			Won Lost	Low High edit this opportunity
Potential client Phone:	: Manuel José			Preference Property ea Search available.	dit	
Email:					choose property	
Qq etapa 🔪	> Início do Processo $>$	Visita aos imo	oveis > Comerc	cialização > Prep. Escritura	edit	
Adding not	e about					

3. Scroll down and click 'Who can edit this opportunity';



4. After selecting the user click 'Save opportunity'.

NOTE: If you want other user to edit the opportunity, click '+' and select the respective

user;

who can see this opportunity				
Everyone				
Only me				
Only				
Who can edit this opportunity:	(Note: Users with individual permission "	dit", will be able to edit if they see t	his record)	
â Utilizador 1				
Utilizador_1				
+ Select somebody	•			
			Save opportunity	Canc

Learn more at: <u>http://academy.egorealestate.com</u>

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