



# Roles and Permissions in Property Vista CRM

## **Summary**

This document is to demonstrate the steps to:

- Create Roles in CRM / Administration
- Assign Roles to Employee

## ***Required Setup***

The user ID and password should be provided to a user of Property Vista CRM with Administrator permissions.

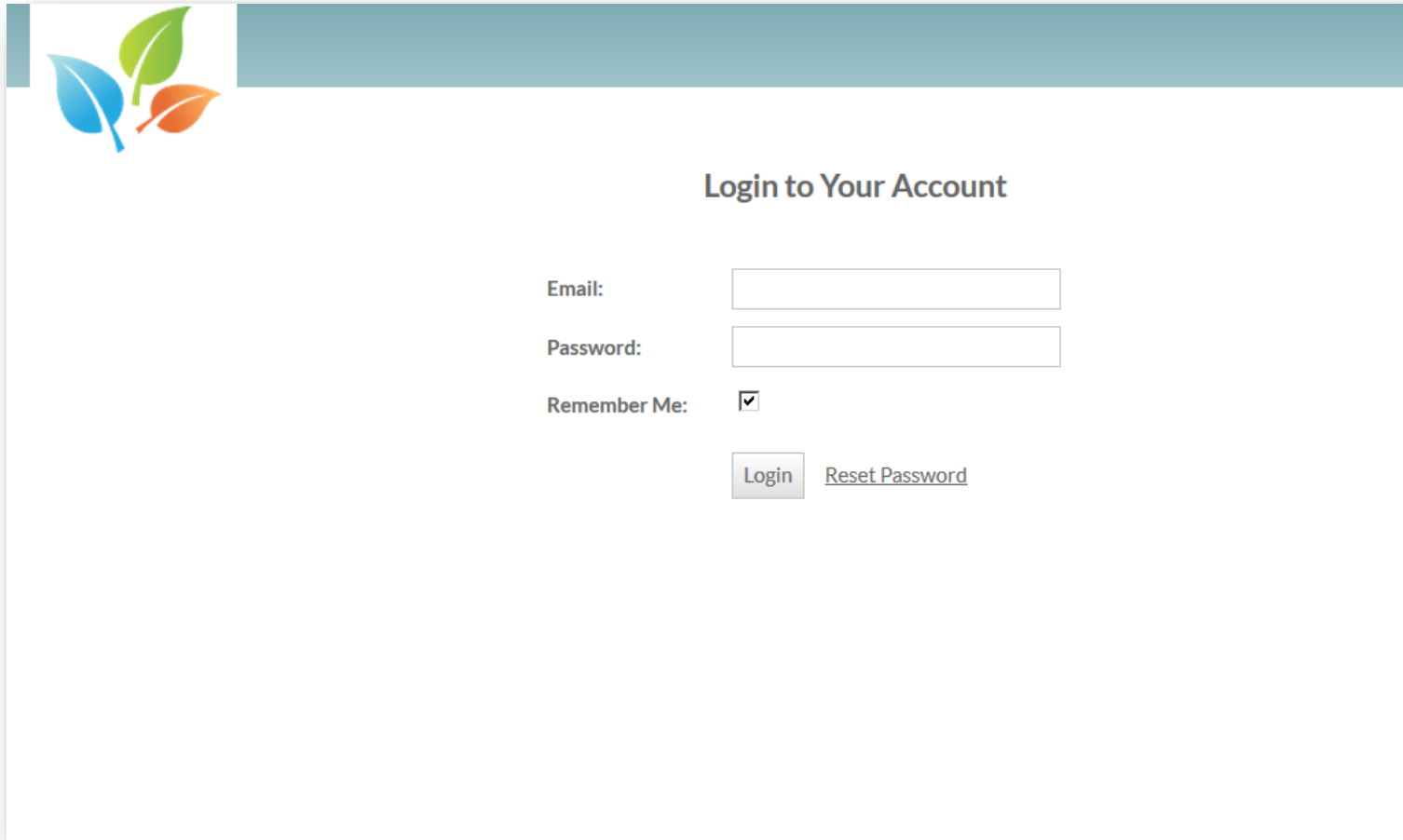
Recommended browsers:

- Firefox All Versions after 8.0 on Windows platform
- Internet Explorer 10 on Windows platform
- Safari on MAC
- Google Chrome

## User Roles in Property Vista CRM

### **Demo Flow**

- 1) Log in to CRM. Use the Link for your CRM location and log in with provided credentials with Full Access to application:



**Login to Your Account**

Email:

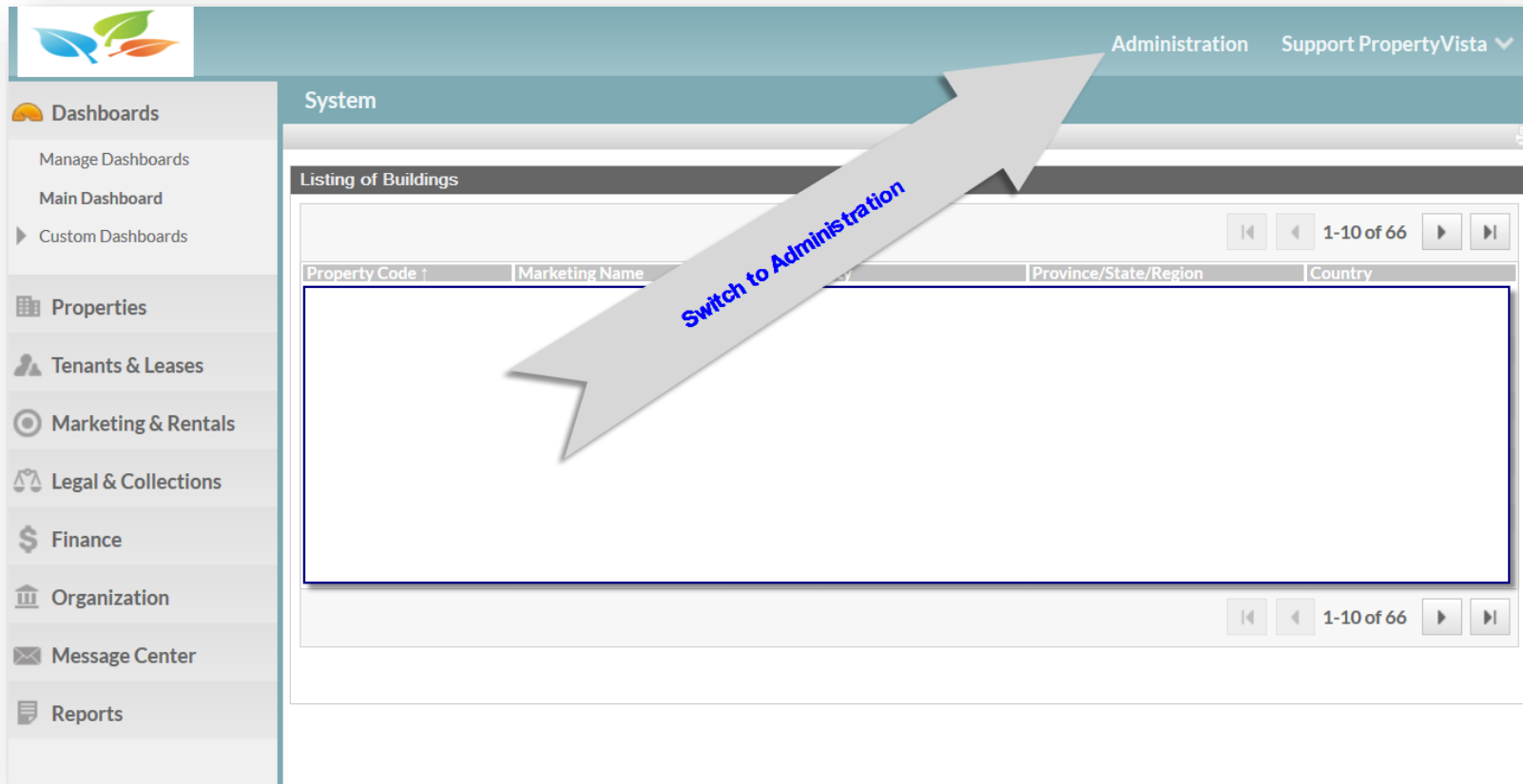
Password:

Remember Me:

[Reset Password](#)

# User Roles in Property Vista CRM

2) Switch to Administration:



# User Roles in Property Vista CRM

3) In Administration Select User Roles and New Role:

The screenshot shows the Administration interface for Property Vista CRM. On the left is a navigation menu with categories: Profile, Security, Financial, Content Management, and Policies. Under the Security category, 'User Roles' is selected and highlighted with a blue box, with a blue arrow labeled 'Step #1' pointing to it. In the main content area, the 'User Role' page is displayed. At the top of this page, there is a '+ New Role' button highlighted with a blue box and a blue arrow labeled 'Step #2', and a 'Filter' button. To the right of these buttons, it shows '1-12 of 12' and 'Page Size: 25'. Below this is a table with two columns: 'Name' and 'Permissions'. The table lists several user roles and their associated permissions.

Name	Permissions
Accounting	Building Accounting, Maintenance Basic, Lease Advanced, Tenant Basic, Guarantor Basic, Potential Tenant Basic, Account Self, Portfolio Basic, Legal & Collections Full, Financial Aggregated Transfer, Dashboards Gadgets Full, Building Financial, Financial Full, Financial Payments, Admin Financial, Lease Full
Basic Login	Building Basic
Leasing	Building Leasing, Lease Basic, Tenant Basic, Application Basic, Application Verify Doc, Credit Check Basic, Potential Tenant Basic, Account Self, Application Decision Submit, Dashboards Gadgets Full, Yardi Loads, Application Decision Reserve Unit, Application Decision Start Online
Marketing	Building Marketing, Maintenance Basic, Lease Advanced, Tenant Basic, Potential Tenant Basic, Guarantor Basic, Account Self, Portfolio Basic, Dashboards Gadgets Full, Financial Payments, Yardi Loads, Admin Content
Property Administrator	Building Mechanicals, Maintenance Full, Lease Advanced, Financial Payments, Guarantor Advanced, Tenant Advanced, Application Basic, Potential Tenant Basic, Account Self, Financial Money IN, Dashboards Gadgets Full, Yardi Loads

## User Roles in Property Vista CRM

- 4) Create new Role, give Name, Description and add required permissions

The screenshot shows the 'User Role New Item...' form in the Property Vista CRM. The form is divided into several sections:

- Header:** 'User Role New Item...' with 'Save', 'Apply', and 'Cancel' buttons.
- Name:** A text input field containing 'BR'.
- Description:** A text area containing 'Custom Role'.
- Security Options:**
  - Require Security (with a help icon)
  - Question For Password
  - Reset:
  - Require Two Step (with a help icon)
  - Verification On Login:
- Permissions:** A section labeled 'Permissions' showing 'No Data' and a '+ Add' button.

Two callout arrows are present:

- A blue arrow pointing to the 'Name' and 'Description' fields with the text 'Give Role Name and Description'.
- A blue arrow pointing to the '+ Add' button with the text 'Click on Add to assign required permissions'.

## User Roles in Property Vista CRM

- 5) The following Permissions were added to role BR: Account:Self, Application Decision: Submit, Application Decision: Start Online, Application: Verify Doc, Financial: Payments, Building: Mechanicals, Guarantor: Basic, Lease: Basic, Maintenance: Full, Potential Tenant: Basic, Tenant Advanced **NOTE: Permissions are selected on one page and user have to click OK. Then user need to go to the following pages to select necessary Permissions and saved on each page. Use the Sort functionality for easier navigation**

The screenshot shows the 'User Role New Item...' dialog box in the Property Vista CRM. The 'Select Permissions' window is open, displaying a table of permissions. The table has columns for 'Permission', 'Description', and a checkbox. The permissions are sorted alphabetically. Three callout boxes provide instructions: 1) Click on Sort to sort in Alphabetic Order, 2) Select Required Permissions on first page, and 3) Click on OK.

Permission	Description	Selected
Account Self	View Own Information, Personal Actions	
<input type="checkbox"/> Admin Content	Content settings	
<input type="checkbox"/> Admin Financial	Financial settings	
<input type="checkbox"/> Admin General	General settings, incl. Edit Message Groups	
<input type="checkbox"/> Application Basic	View Lead View Lease Application App Document Upload/Sign, Create Draft Hidden Financial	
<input type="checkbox"/> Application Decision Approve	Application Decision: Approve, Decline, Request Further Information, Cancel	
<input type="checkbox"/> Application Decision Full	Application Decision:All	
<input type="checkbox"/> Application Decision Reserve Unit	Application Decision: Reserve Unit, Cancel	
<input checked="" type="checkbox"/> Application Decision Start Online	Application Decision: Start Online Application, Cancel	
<input checked="" type="checkbox"/> Application Decision Submit	Application Decision: Submit, Cancel	
<input type="checkbox"/> Application Decision Verify	Application Decision: Verify (Complete Application, Request Further Information, Cancel)	
<input type="checkbox"/> Application Full	Full Access to Leads/Lease Application App Document Upload/Sign, Create Draft, Cancel	
<input checked="" type="checkbox"/> Application Verify Doc	View Lease Application App Document Upload/Sign, Create Draft, Cancel	
<input type="checkbox"/> Building Accounting	View all building information	

# User Roles in Property Vista CRM

6) Role is created, if necessary it can be edited

The screenshot displays the 'User Role BR' configuration page in the Property Vista CRM. The left sidebar contains navigation menus for Profile, Security, Financial, Content Management, and Policies. The main content area is titled 'User Role BR' and includes an 'Edit' button in the top right corner. A callout arrow points to the 'Edit' button with the text 'If necessary role can be edited'. The 'Permissions' section is highlighted with a blue box and lists the following permissions:

- Account Self
- Application Decision Submit
- Application Decision Start Online
- Application Verify Doc
- Financial Payments
- Guarantor Basic
- Lease Basic
- Maintenance Full
- Potential Tenant Basic
- Tenant Advanced
- Building Mechanicals

Name	BR
Description	Custom Role
Require Security Question For Password Reset	No ?
Require Two Step Verification On Login	No ?

## User Roles in Property Vista CRM

7) To assign Report to the Role select “Assigned Reports” and then required Report, e.g. EFT:

**NOTE: Reports were NOT assigned to role BR**

The screenshot displays the 'Assign Reports' interface in the Property Vista CRM. The left sidebar contains a navigation menu with the following items: Profile, Security, Audit Records, User Roles, Communication Settings, Assign Reports (highlighted with a blue box and labeled 'Step #1'), Tenant, Financial, Content Management, and Policies. The main content area is titled 'Assign Reports' and features a 'Filter' button and a table with two columns: 'Report Type ↑' and 'Roles'. The table lists the following reports and their assigned roles:

Report Type ↑	Roles
Auto Pay Changes	Super Administrator
Availability	Super Administrator
Customer Credit Check	Super Administrator
EFT	Super Administrator
EFT Variance	Super Administrator
Resident	Super Administrator

The 'EFT' report type is highlighted with a blue box and labeled 'Step #2'.



# User Roles in Property Vista CRM

8) On EFT Report assignment page click on Edit and add newly created Role: Save the changes.

The screenshot displays the 'Assign Reports' interface. At the top right, there are links for 'Exit Administration' and 'Support Proper'. Below these are 'Save' and 'Apply' buttons. The main content area features a table with the following structure:

* Name	Description	Permissions
Super Administrator		[Building Basic, Building Financial, Building Accounting, Building Property, Building Marketing, Building Mechanicals, Building Administrator, Building Leasing, Yard Loads, Maintenance Basic, Maintenance Advanced, Maintenance Full, Lease Basic, Lease Advanced, Lease Full, Application Basic, Application Verify Doc, Application Full, Application Decision Reserve Unit, Application Decision Start Online, Application Decision Submit, Application Decision Verify, Application Decision Approve, Application Decision Full, Credit Check Basic, Credit Check Full, Tenant Basic, Tenant Advanced, Tenant Full, Potential Tenant Basic, Potential Tenant Advanced, Potential Tenant Screening, Potential Tenant Full, Guarantor Basic, Guarantor Advanced, Guarantor Full, Financial Money IN, Financial Aggregated Transfer, Financial Payments, Financial Full, Account Self, Employee Basic, Employee Full, Portfolio Basic, Portfolio Full, Legal & Collections Basic, Legal & Collections Full, Dashboards Gadgets Basic, Dashboards Gadgets Full, Admin General, Admin Financial, Admin Content]

A dropdown menu for 'Report Type' is set to 'EFT'. Below the table, a '+ Add' button is highlighted. A callout box with an arrow points to this button, containing the text: 'Click Add to assign Role to Report EFT'. The left sidebar includes sections for Profile, Security (with sub-items: Audit Records, User Roles, Communication Settings, Assign Reports, Tenant Security), Financial, Content Management, and Policies.

## User Roles in Property Vista CRM

- 9) Now assign the Role to Employee: Exit Administration and in Organization / Employee section, on employee information screen, on the second tab Privileges assign Role to Employee

The screenshot displays the 'Employee' information screen in the Property Vista CRM. The interface is divided into a sidebar on the left and a main content area on the right. The sidebar contains navigation menus for Dashboards, Properties, Tenants & Leases, Marketing & Rentals, Legal & Collections, Finance, and Organization. The Organization menu is expanded, showing 'Employees' highlighted. The main content area shows the 'Employee' information screen with tabs for Personal Information, Privileges, and Alerts. The 'Privileges' tab is active, displaying a table of roles and their permissions. The table has columns for Name, Description, and Permissions. A role named 'BR' is listed with a description of 'Custom Role' and a list of permissions including 'Account Self, Application Decision Submit, Application Decision Start Online, Application Verify Doc, Financial Payments, Guarantor Basic, Lease Basic, Maintenance Full, Potential Tenant Basic, Tenant Advanced, Building Mechanicals'. There is a '+ Add' button below the table. The interface also includes a 'Save' button, an 'Apply' button, and a 'Cancel' button. Annotations include 'Step #1' pointing to the 'Employees' link in the sidebar, 'Step #2' pointing to the 'Privileges' tab, 'Step #3' pointing to the '+ Add' button, and 'Step #4' pointing to the 'Save' button.

Name	Description	Permissions
BR	Custom Role	[Account Self, Application Decision Submit, Application Decision Start Online, Application Verify Doc, Financial Payments, Guarantor Basic, Lease Basic, Maintenance Full, Potential Tenant Basic, Tenant Advanced, Building Mechanicals]