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

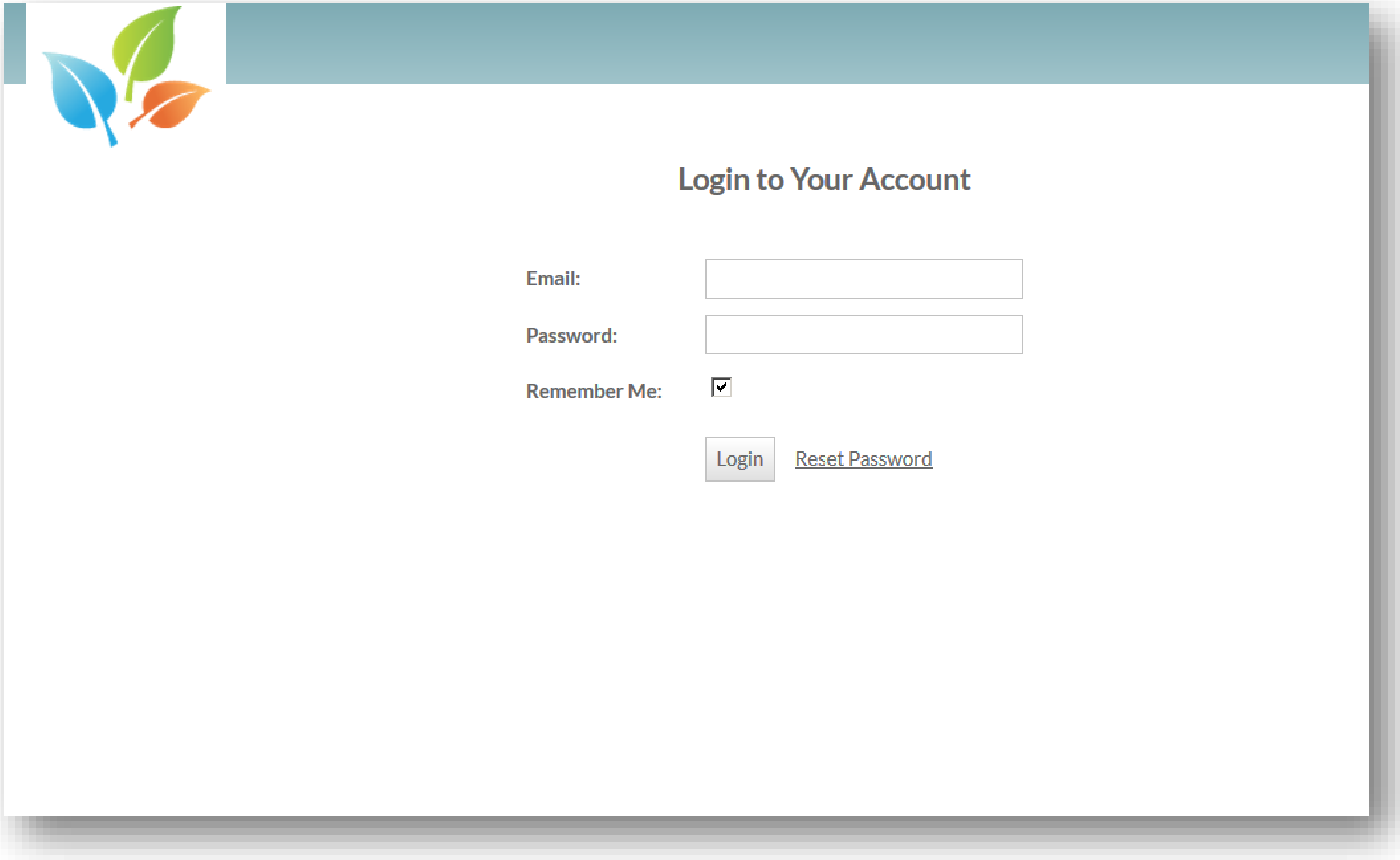
The user ID and password should be provided to a user of Property Vista CRM with Administrator permissions.

Recommended browsers:

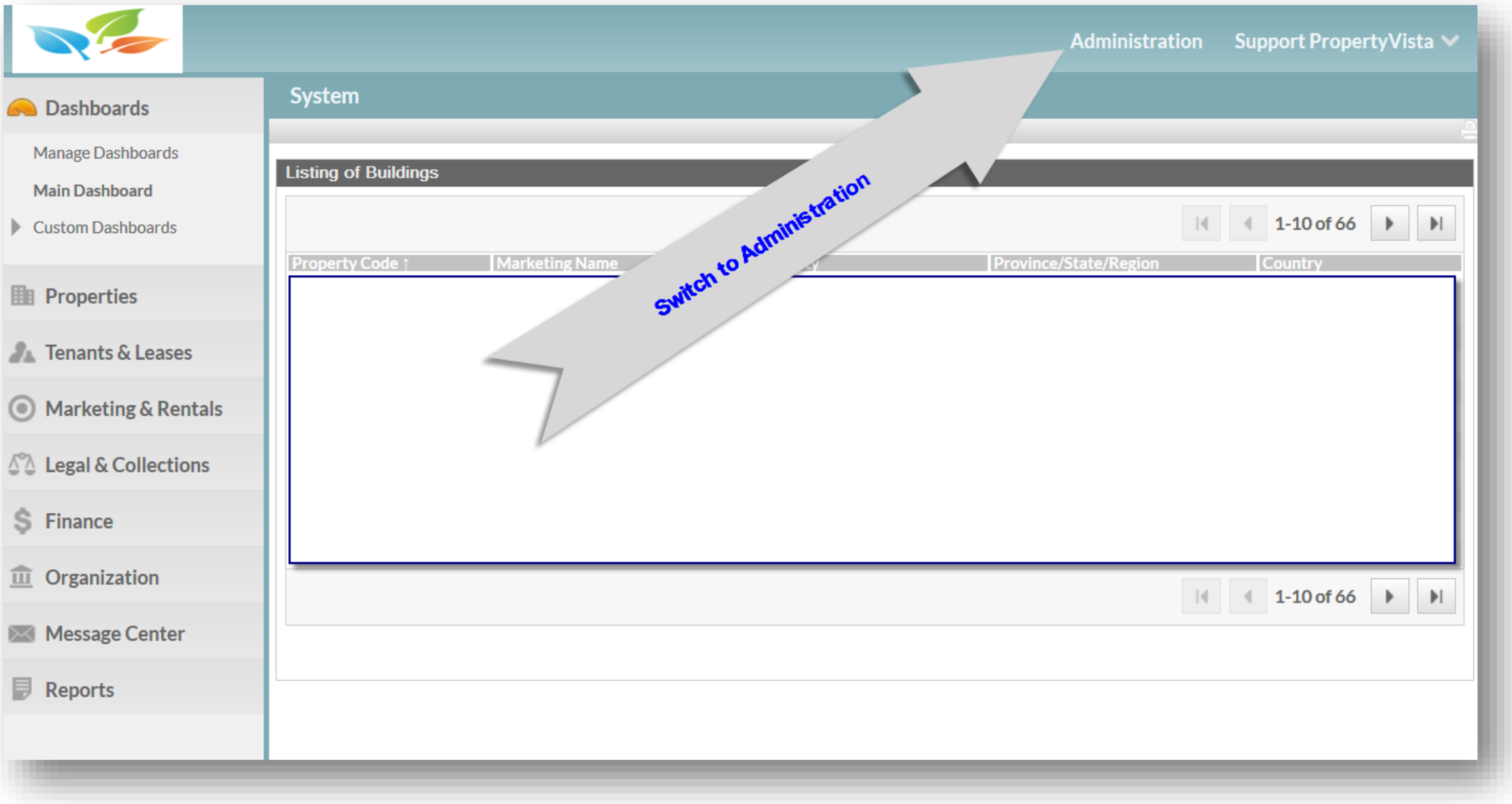
- Firefox All Versions after 8.0 on Windows platform
- Internet Explorer 10 on Windows platform
- Safari on MAC
- Google Chrome

Demo Flow

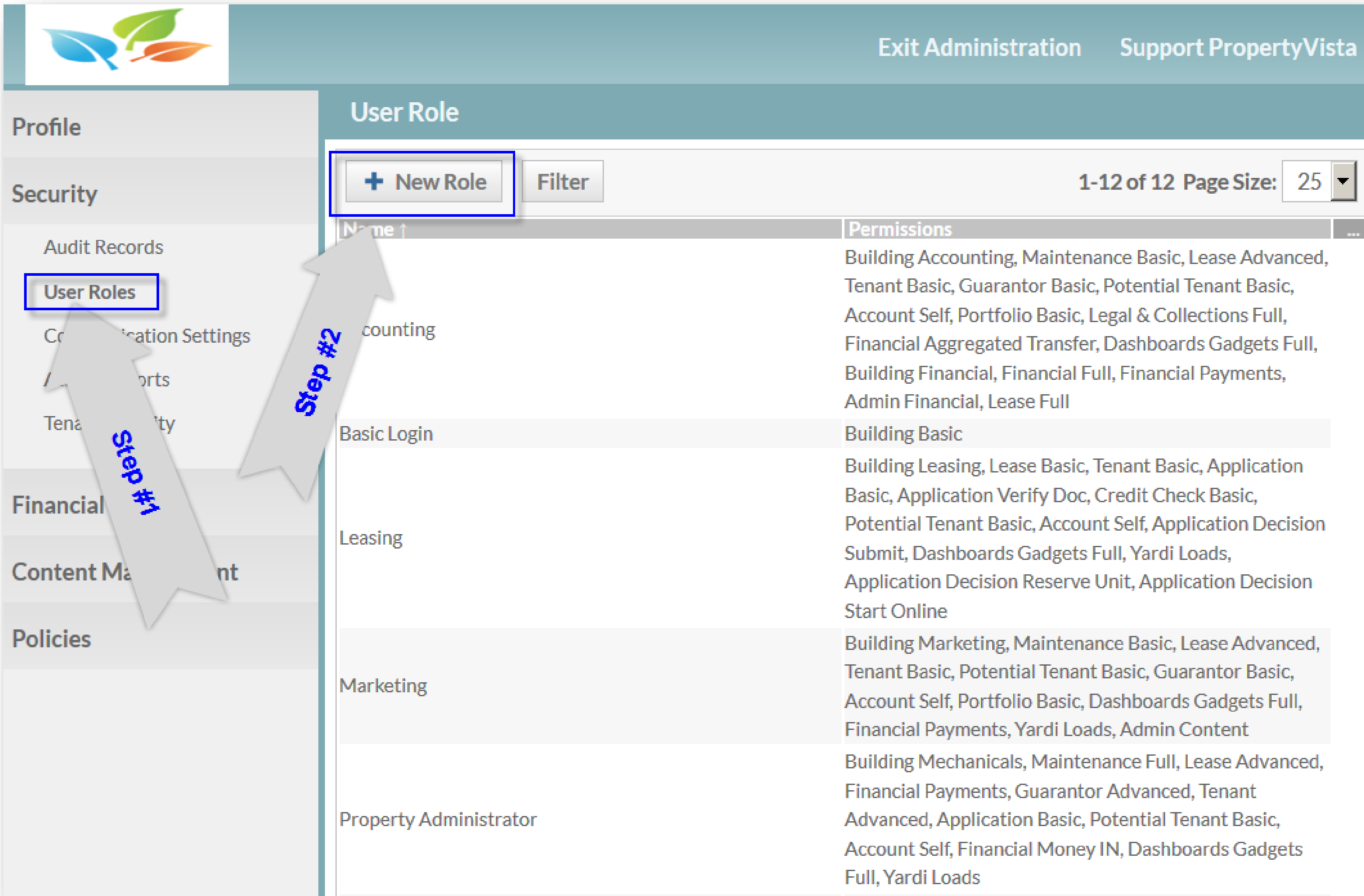
1) Log in to CRM. Use the Link for your CRM location and log in with provided credentials with Full Access to application:



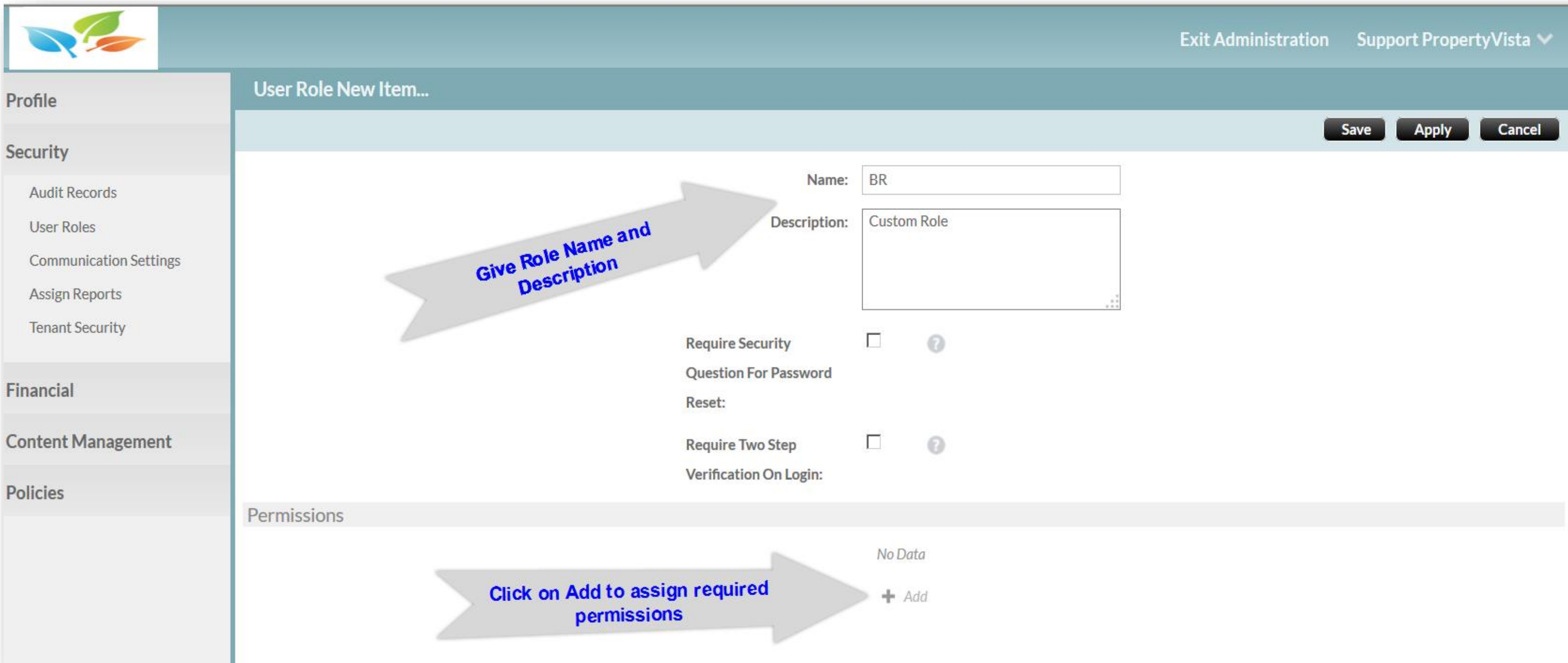
2) Switch to Administration:



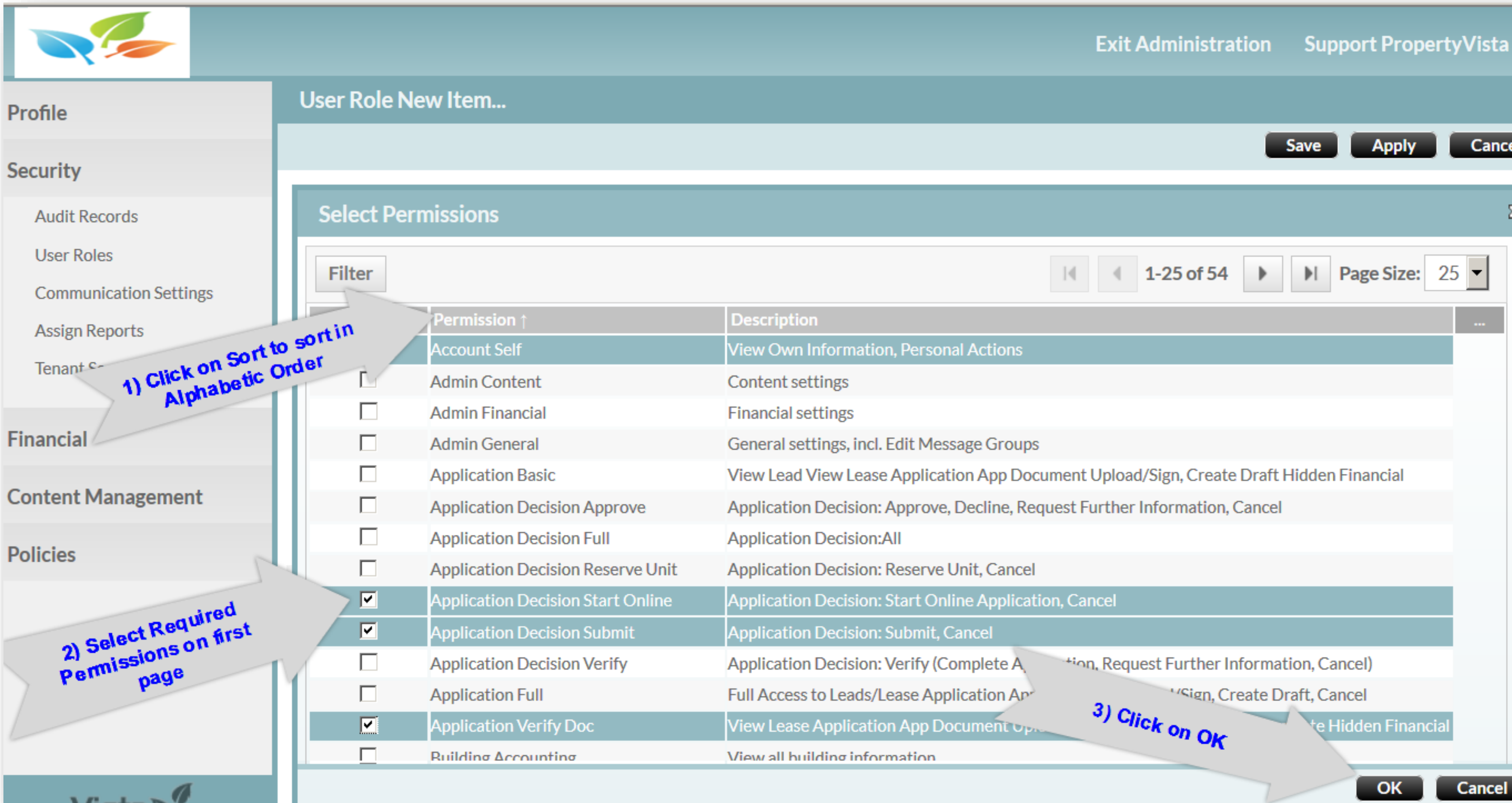
3) In Administration Select User Roles and New Role:



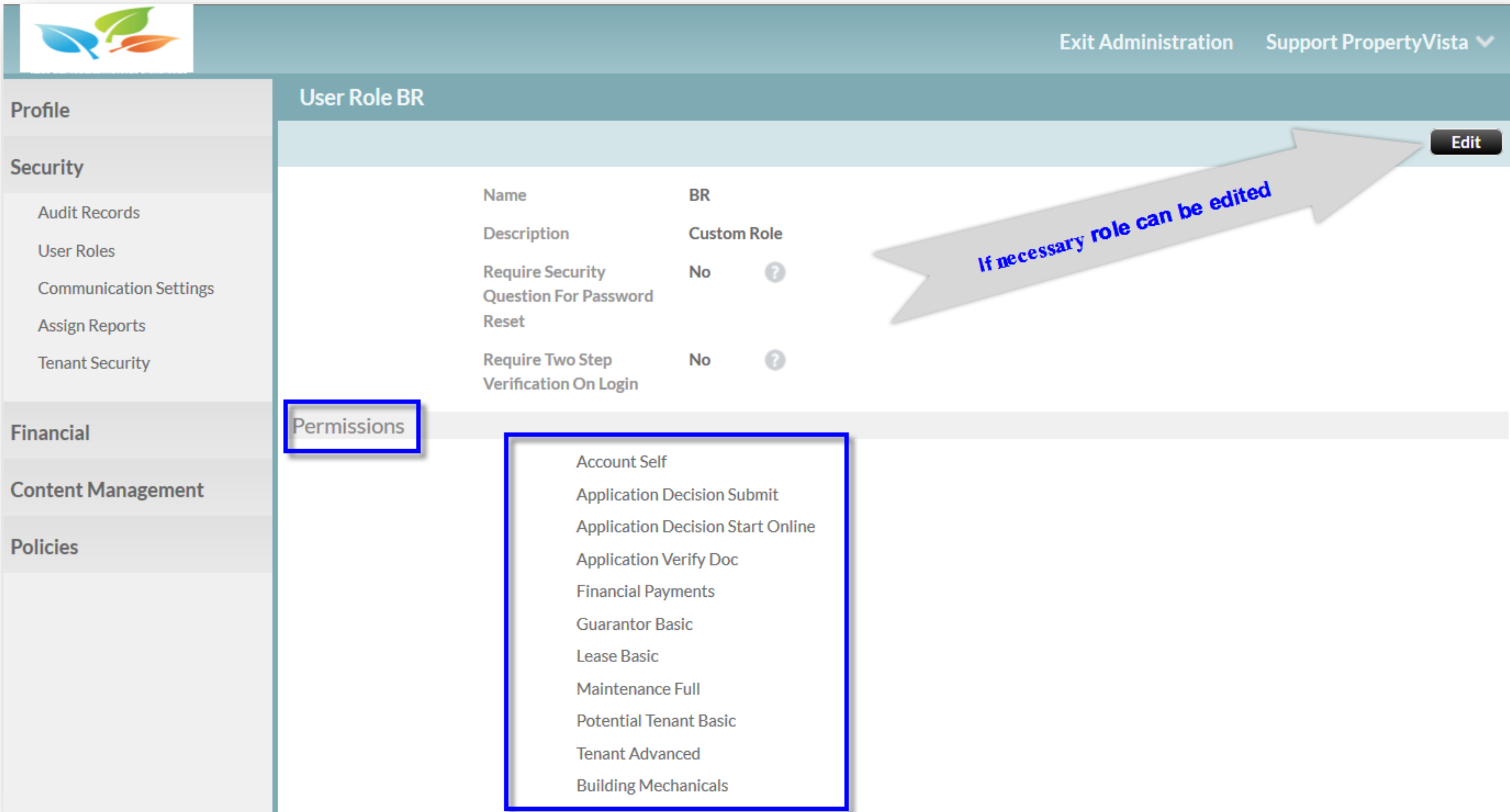
4) Create new Role, give Name, Description and add required permissions



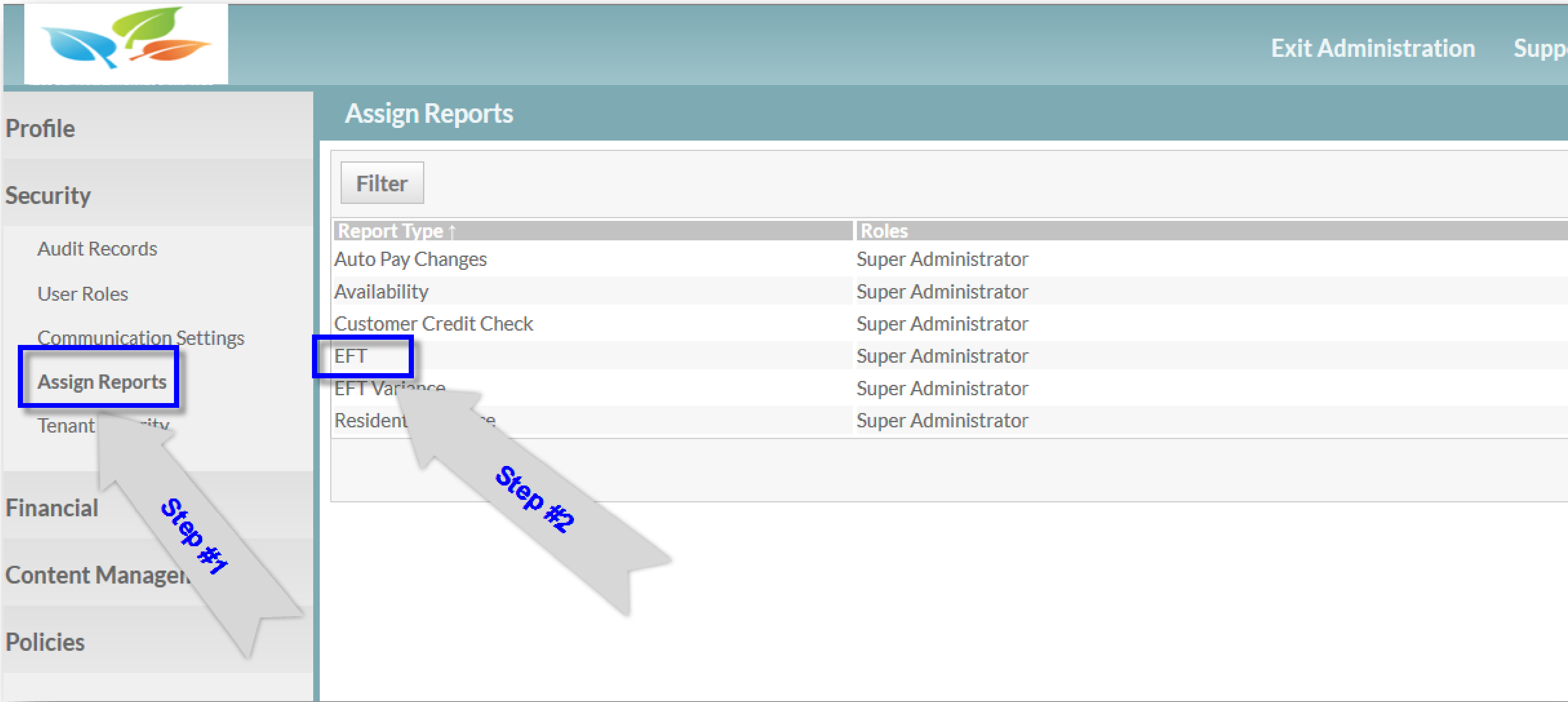
5) The following Permissions were added to role BR: Account:Self, Application Decision: Submit, Application Decision: Start Online, Application: Verify Doc, Financial: Payments, Building: Mechanicals, Guarantor: Basic, Lease: Basic, Maintenance: Full, Potential Tenant: Basic, Tenant Advanced **NOTE: 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**



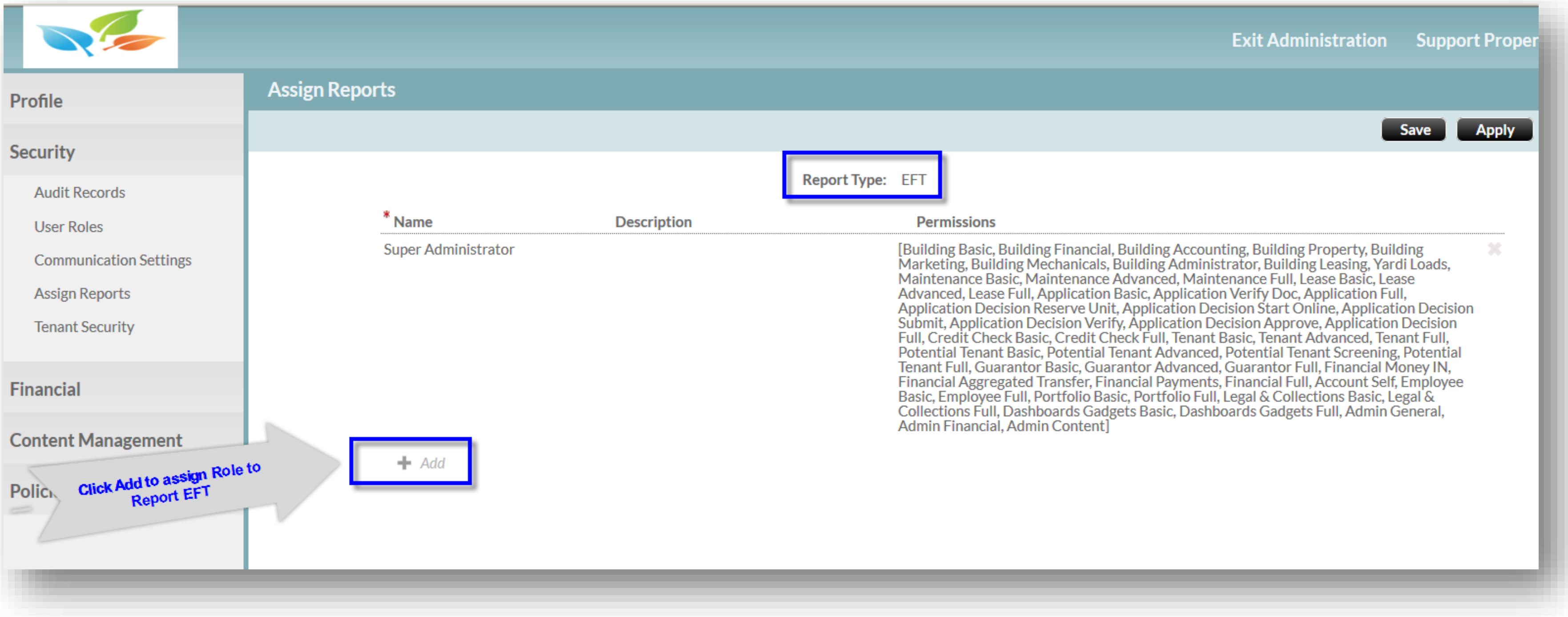
6) Role is created, if necessary it can be edited



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



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



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