Roles & Users

Control who can access what across the entire CRM — build roles with granular permissions, place users in a hierarchy tree, and manage visibility from a single module.

Roles & Users

Overview

The **Roles & Users** module controls who can access what in the CRM. Access is managed through a two-step structure: first you create a **Role** with a specific set of permissions, then you create a **User** and assign them that role. The role defines what the user can see and do across the entire system.

How It Works

```
Create Role → Assign Permissions → Create User → Assign Role + Parent User
```

1. **Create a Role** — give it a name and select which permissions it has from a categorized list.
2. **Create a User** — assign them a Role, a Parent User, and their projects.
3. The system uses the **Parent User** to build a **hierarchy tree** — this tree controls visibility: a parent can see everything their child users can see.

The Hierarchy Tree

The hierarchy tree is central to how the CRM works:

- Every user has a **Parent** — the user above them in the hierarchy.
- A parent can see all leads, tickets, and data belonging to any user below them in the tree.
- When assigning a lead or ticket to someone, the system shows users from the tree — a manager sees users under them and can assign to any of them.
- The tree also affects reports, dashboard views, and delayed lead visibility.

> **Example:** If Sales Manager A is the parent of Salesman B and Salesman C, then Manager A can see all leads assigned to B and C. B and C can only see their

> own leads.

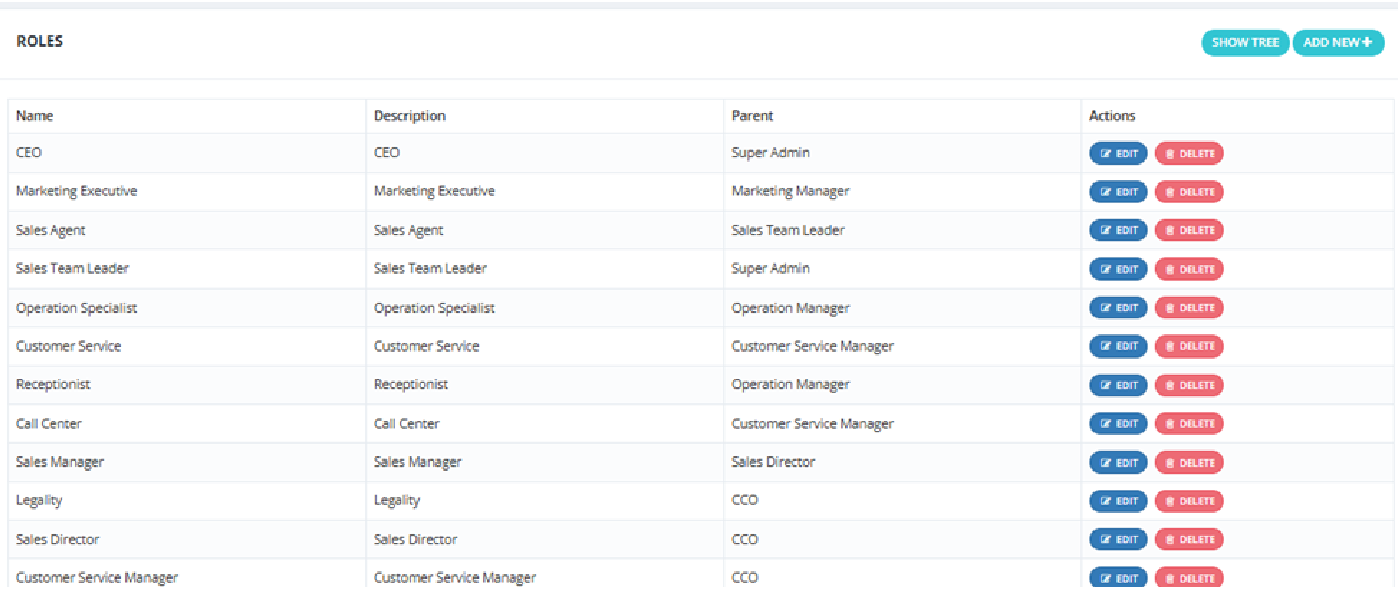
Module Pages

Page	Description
Roles	How to create roles, the role tree, and the full permissions reference.
Users	How to create users, assign roles and parents, and user-specific settings.
Permissions Reference	Full breakdown of every permission group and what each permission controls.

Roles

Overview

A **Role** is a named set of permissions. Every user in the system must be assigned a role — the role determines what they can see and do across all modules.


ROLES

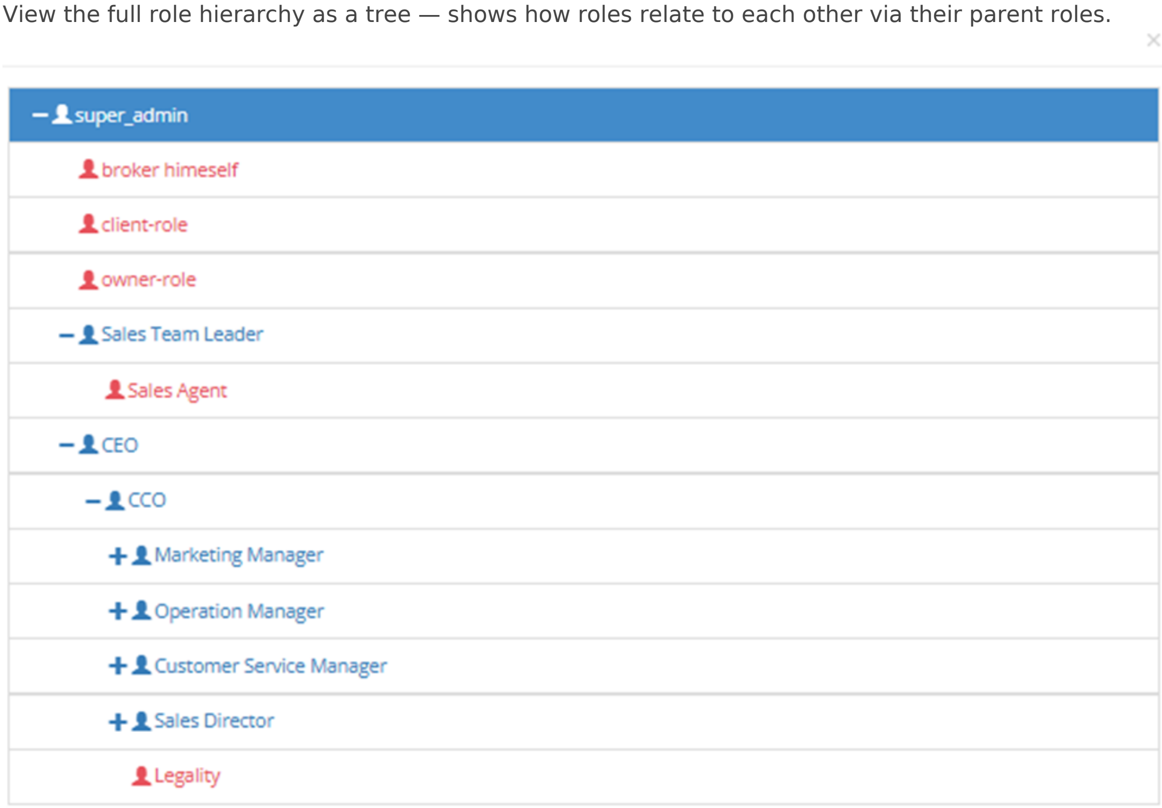
SHOW TREE ADD NEW

Name	Description	Parent	Actions
CEO	CEO	Super Admin	EDIT DELETE
Marketing Executive	Marketing Executive	Marketing Manager	EDIT DELETE
Sales Agent	Sales Agent	Sales Team Leader	EDIT DELETE
Sales Team Leader	Sales Team Leader	Super Admin	EDIT DELETE
Operation Specialist	Operation Specialist	Operation Manager	EDIT DELETE
Customer Service	Customer Service	Customer Service Manager	EDIT DELETE
Receptionist	Receptionist	Operation Manager	EDIT DELETE
Call Center	Call Center	Customer Service Manager	EDIT DELETE
Sales Manager	Sales Manager	Sales Director	EDIT DELETE
Legality	Legality	CCO	EDIT DELETE
Sales Director	Sales Director	CCO	EDIT DELETE
Customer Service Manager	Customer Service Manager	CCO	EDIT DELETE

The Roles Screen

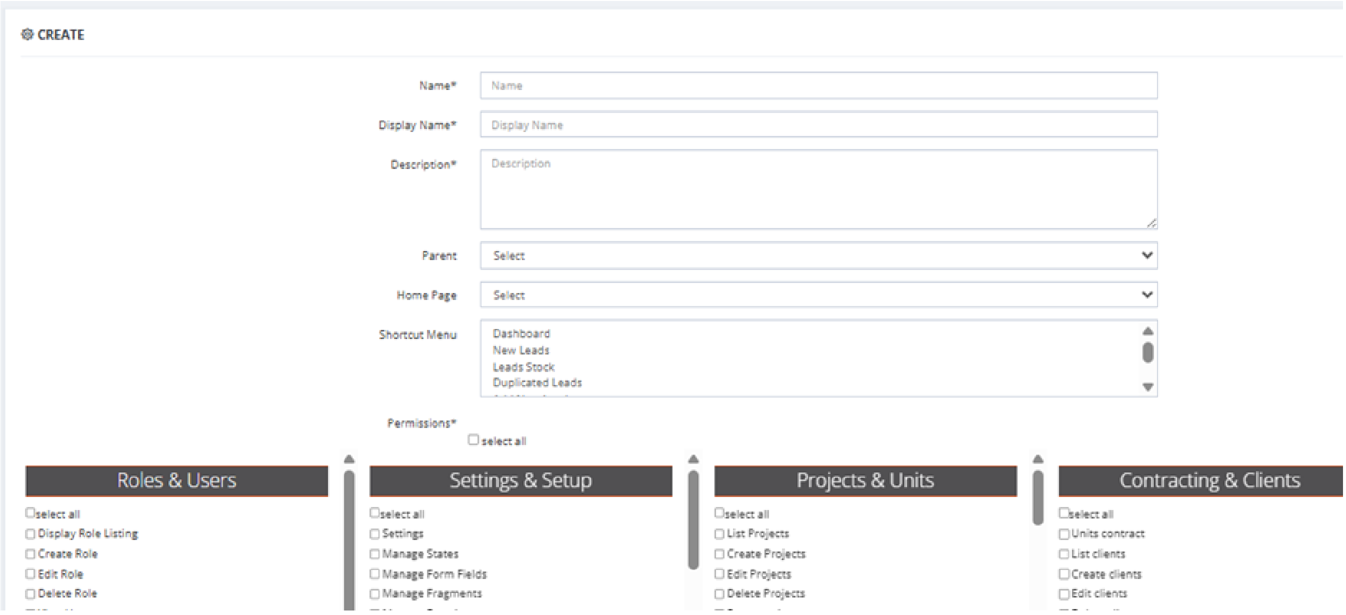
Go to **Roles & Users → Roles**. From here you can:

Action	Description

<table>
<tr><td>Show Tree</td><td>View the full role hierarchy as a tree — shows how roles relate to each other via their parent roles.

</td></tr>
<tr><td>Create Role</td><td>Add a new role.</td></tr>
</table>

Creating a Role

1. Click **Create Role**.
2. Fill in the role details and select its permissions (see Permissions Reference page).
3. Select the **Parent Role** — the role above this one in the hierarchy tree. This determines which users will be able to see data from users assigned to this role.
4. Save.



How the Role Tree Works

When creating a user, you select both a **Role** and a **Parent User**. The system uses the parent role structure to determine the hierarchy. When assigning a user's parent, it looks at the parent role selected on the role — and shows you all users who have that parent role assigned, so you can pick the correct one.

> **Example:** You create a "Salesman" role with "Sales Manager" as its parent role. When you create a user with the Salesman role and need to pick their Parent User, the system shows all users who have the Sales Manager role — you pick the specific manager this salesman reports to.

Role Permissions

Permissions are organized into groups. Each group covers a specific area of the CRM. See the **Permissions Reference** page for the full breakdown of every permission and what it controls.

The **Select All** option within each group grants every permission in that group at once.

> ⚠ Some permissions have dependencies — enabling one may require another to be enabled as well, or a permission may be useless without a related one. Review the Permissions Reference carefully when building a new role.

Users

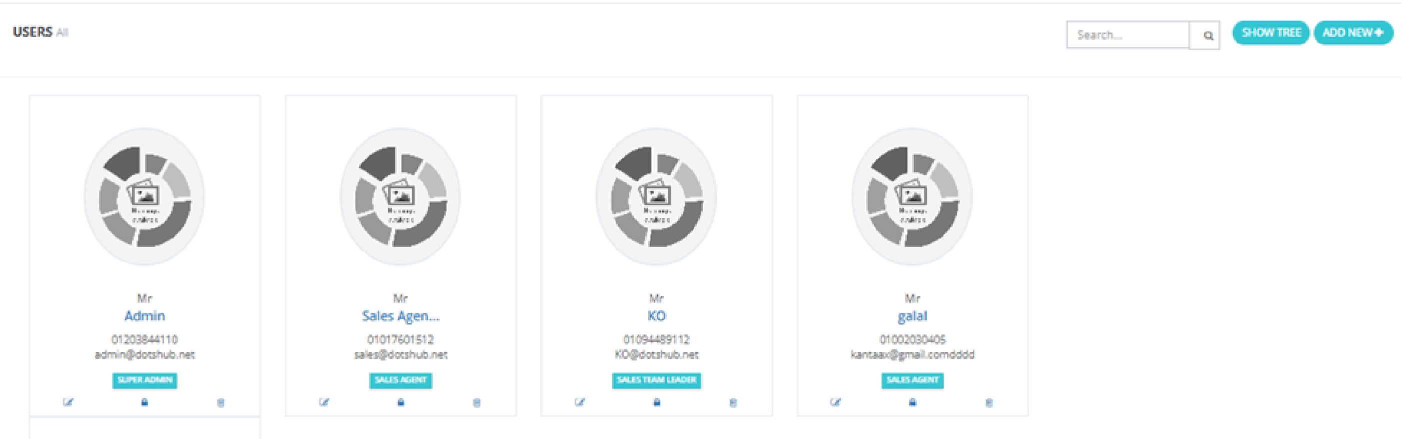
Overview

A **User** is anyone who logs into the CRM. Each user is assigned a Role (which defines their permissions) and a Parent User (which places them in the hierarchy tree).

The Users Screen

Go to **Roles & Users → Users**. From here you can:

Action	Description
Show Tree	View all users arranged in the hierarchy tree. 
Create User	Add a new user.
Edit	Edit an existing user's details, role, or parent.

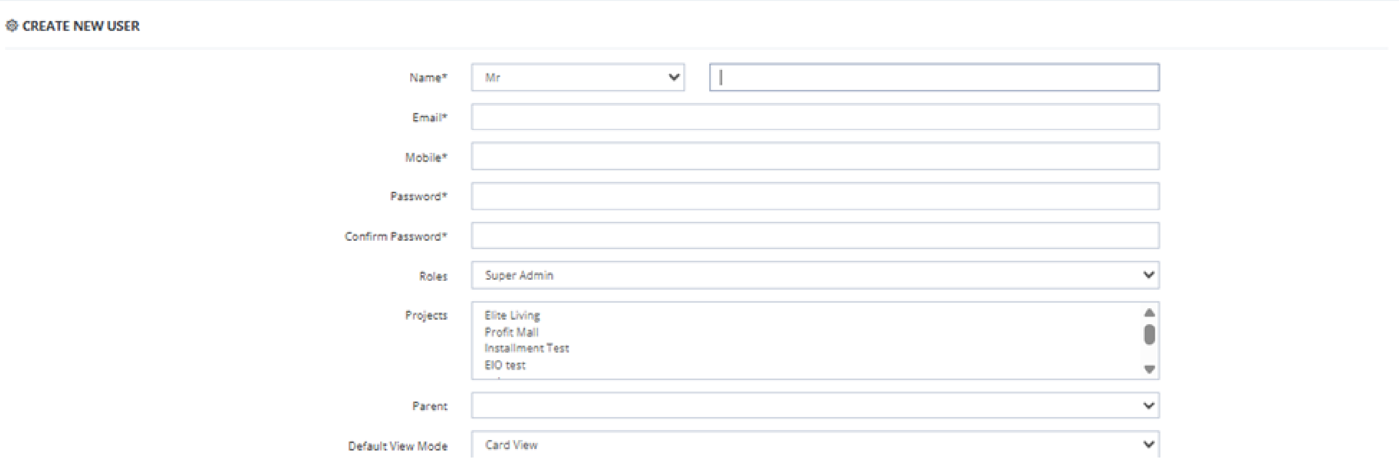


Creating a User

Click **Create User** and fill in the following fields:

Fields

Field	Required	Description
Name	▯	User's full name. Includes a title prefix (e.g., Mr).
Email	▯	User's email address — used for login and system notifications.
Mobile	▯	User's mobile number.
Password	▯	Login password.
Confirm Password	▯	Password confirmation.
Roles	▯	The role assigned to this user — determines all permissions.
Projects	Optional	The projects this user has access to (e.g., Elite Living, Profit Mall, Installment).
Parent	Optional	The user above this user in the hierarchy tree. The system shows available parent users based on the parent role configured on the selected role.
Default View Mode	Optional	The default display mode for units (e.g., Card View).



User-Level Settings

In addition to the role-based permissions, each user has the following individual settings:

Setting	Description
SMS Assign	When ON, the user receives an SMS notification when a lead is assigned to them.
SMS Not Reply	When ON, the user receives an SMS notification when a lead hasn't been replied to within a set time.
User Logs	View a log of all actions taken by this user in the system.
SMS Logs	View all SMS messages sent to or from this user.
Email Logs	View all emails sent to or from this user.

The Parent User & Hierarchy Tree

The **Parent** field places this user in the hierarchy tree under the selected parent. This has several effects:

- The parent user can see all leads, data, and activity belonging to this user.
- When this user needs to assign a lead, they see users below them in the tree.
- Reports and dashboards respect the tree — a manager sees aggregate data for their entire team.
- The dashboard's delayed leads section shows a manager all delayed leads across their team.

> ⚠ A user without a parent sits at the top of their own tree branch — they will not be visible to any other user unless someone is set as their parent.

Permissions Reference

Overview

Permissions are organized into groups — each group covers a specific area of the CRM. When building a role, you select which permissions to grant from these groups. **Select All** within a group grants every permission in that group.

> ⚠ The **Settings** permission is a special case — a user who has access to any Settings section without this permission can view the settings but any edits they make will not be saved.

Roles & Users

Permission	Description
Display Role Listing	View the list of roles only — cannot edit or manage.
Create Role	Create new roles.
Edit Role	Edit existing roles.
Delete Role	Delete roles.
View Users	View the list of users only — cannot edit or manage.
Create Users	Create new users.
Show User Profile	View a user's full profile.
Edit User Profile	Edit user profile details.
Delete Users	Delete users.
Dashboard	Access the main dashboard.
Display Totals in Units List	See aggregate totals at the top of the units list.
Block Users	Block a user from logging in.
Users Logs	View the action log for users.
SMS Logs	View SMS logs.

Permission	Description
Email Logs	View email logs.

Settings & Setup

Permission	Description
Settings	Required to save any changes in Settings — without this, settings pages are view-only.
Manage States	Create, edit, and delete lead states.
Manage Form Fields	Manage custom fields on lead/client forms.
Manage Fragments	Manage reusable content fragments.
Manage Rotation	Configure lead rotation and auto-assignment rules.
General Settings	Access General Settings.
Sales Settings	Access Sales Settings.
Inventory Settings	Access Inventory Settings.
Brokers Settings	Access Broker Settings.
Finance Settings	Access Finance Settings.
Customer Service Settings	Access Customer Service Settings.
Manage Global Contracts	Create and manage contract templates.
List Facebook Integration	View Facebook lead integration settings.
Inventory Uploads	Bulk upload units via Excel.
Upload Brokers	Bulk upload broker companies.
Upload For Assign	Bulk upload leads for assignment.
List States Group	View states groups.
Create States Group	Create new states groups.
Edit States Group	Edit existing states groups.
Delete States Group	Delete states groups.
Manage Global Appendices	Manage global appendix documents.

Projects & Units

Permission	Description
List Projects	View the list of projects.
Create Projects	Create new projects.
Edit Projects	Edit project details.
Delete Projects	Delete projects.
Freeze Units	Freeze a unit to prevent any sales actions on it.
List Units	View the units list.
Hold Units	Move a unit to the Hold stage.
View Non Available Units (Hidden)	See units that are hidden from the standard list.
Units Availability Settings	Configure unit availability rules.
See Full Projects Info	View complete project details including financial info.
Pricing	View and manage unit pricing.
Un Hold	Remove a unit from Hold and return it to Available.
Un Hold Limit Management	Manage limits on how many units can be un-held.
Unit Actions	Perform actions on units in the pipeline.
Show Unit History	View the full action history of a unit.
Discard Show Units	Bulk cancel all pending View-to-Client assignments.
Export Units Table	Export the units list.
See Units Payment Details	View payment schedule details on a unit.
View to Client	Show a unit to a client (View to Client button).
Quick Hold Unit	Use the Quick Hold button (for clients without an existing profile).
Unblock Unit	Unblock a frozen or blocked unit.
View Delayed Payment	See installments in the Delayed Payments tab.
View Extra Delayed Payment	See installments in the Extra Delayed Payments tab.
QR Code	Generate and view unit QR codes.
Compare Units	Use the unit comparison feature.
View Sold Units	See units that have been sold.
Units Actions Filter	Access the Units Actions Filter report.
Unit Hold Limit	Set and manage the hold limit per unit.
Compare Projects	Use the project comparison feature.
Unit State Change Notifications	Receive notifications when a unit's pipeline state changes.
Price Change	Use the bulk price change tool.

Permission	Description
List Buildings	View buildings within a project.
Create Buildings	Add new buildings.
Edit Buildings	Edit building details.
Delete Buildings	Delete buildings.
List Building Segments	View building segments.
Create Building Segments	Add new building segments.
Edit Building Segments	Edit building segment details.
Delete Building Segments	Delete building segments.
Create Units	Add new units.
Edit Units	Edit unit details.
Delete Units	Delete units.
Force Inventory List	View the full inventory list regardless of project assignment.
Change Premium Segment	Change a unit's premium segment designation.
Add EOI Project	Enable EOI on a project.
Contract Log	View the contract log for units.
Units Repricing	Use the units repricing tool.
Quick Reserve Unit	Use the Quick Reserve button (for existing clients).

Contracting & Clients

Permission	Description
Units Contract	Access and manage unit contracts in the pipeline.
List Clients	View the clients list.
Create Clients	Create new client profiles.
Edit Clients	Edit client details.
Delete Clients	Delete client profiles.
Add Reservation Fees	Add reservation fees on a unit.
Make Down Payment	Process the down payment step.
Unit Delivery	Mark a unit as delivered.
Un-Deliver Unit	Reverse a unit delivery.

Permission	Description
Export Clients	Export the clients list.
Force Client List	View all clients regardless of hierarchy.
Modify Client User Access	Change which users can access a client's profile.
Reset Clients Credentials	Reset a client's login credentials.
Client Updates	Post client updates.
List Client Requests	View client requests.
Create Client Requests	Submit new client requests.
Edit Client Requests	Edit existing client requests.
Delete Client Requests	Delete client requests.
Assign Client Requests	Assign client requests to a team member.
Download Contract Form	Download the contract document.
Change Client Permission	Modify a client's access permissions.
Client Requests Seen	Mark client requests as seen.
Payment History In Client Profile	View payment history from inside the client profile.
Client History In Client Profile	View client interaction history from inside the client profile.
Unit Action History In Client Profile	View unit pipeline history from inside the client profile.
Owner Open Profile	Allow the profile owner to open and view their own profile.
Force Refund	Process a forced refund on a unit.
Client Private Files Edit	Edit files in the client's private files section.
Client Private Files	View the client's private files section.
In-Profile Delivery Update	Post delivery updates from inside the client profile.
Download Contract as Word	Download the contract as a Word document.

Financial

Permission	Description
View Payments	View installments in the Payments tab.
Pay	Collect a payment (PAY button).
Refund	Process a refund.
Add Payment	Add an extra payment to a unit's plan.

Permission	Description
View Wallet	View the client's payment wallet.
Edit Payment	Edit an existing payment's details.
View Payment Details	View the full payment schedule of a unit.
Edit Non-Available Unit's Payment	Edit payments on units that are not in an active pipeline stage.
List Targets	View sales targets.
Create Targets	Create new sales targets.
Edit Targets	Edit existing targets.
Delete Targets	Delete targets.
Edit Non-Available Units	Edit units outside the active pipeline.
Export Payments	Export the payments list.
Export Wallet	Export wallet data.
Export Penalties	Export the penalties list.
Export Benefits	Export the client benefits list.
Discard Collection Payment	Cancel/discard a collected payment.
Download Reservation Form	Download the reservation form document.
Auto Contract	Use the auto-contract generation feature.
Export Payment Method Excel	Export payment methods as Excel.
View Payment Methods Table	View the payment plans on a unit and download as PDF.
Set Global Payment Methods	Configure global payment methods in Setup.
Select Global Payment Methods	Select which global payment methods apply to a unit.
Manage Discounts	Set maximum discount limits per role.
Add Offer	Create new promotional offers.
Edit Offer	Edit existing offers.
Delete Offer	Delete offers.
List Offers	View all offers.
Force Offer List	View all offers regardless of hierarchy.
Upload Payment Attachment	Upload a file attachment to a payment.
Download Payment Attachment	Download a file attached to a payment.
Add EOI Form	Create a new EOI.
Edit EOI	Edit an existing EOI.
Collect EOI	Process the Collect action on an EOI.

Permission	Description
Refund EOI	Process the Refund action on an EOI.
List EOIs In Client Profile	View EOIs from inside the client profile.
Delete EOI	Delete an EOI.
Download EOI Form	Download the EOI document.
EOI Management	Access the EOI Management screen.
Export EOI	Export the EOI list.
Restore EOI	Restore a deleted EOI.
Edit Payment Cheque Info	Edit cheque/bank details on a payment.
Override NPV Payment Plan Validation	Save an NPV plan that fails the XNPV check (override permission).
View NPV Financial Rules	View the NPV financial rules and configuration.
Manage NPV Financial Rules	Edit NPV financial rules (Rate, Delivery %, Max Years).
Add Payment Calculator (NPV)	Create a new NPV payment plan.
Edit Payment Calculator (NPV)	Edit an existing NPV payment plan.
Delete Payment Calculator (NPV)	Delete an NPV payment plan.

Leads & Sales

Permission	Description
Manage Leads	Full lead management access.
Assign Leads	Assign leads to salesmen.
Manage Returned Leads	Manage leads in the Lead Stock / returned leads section.
Upload Leads	Bulk upload leads via Excel.
Create Leads	Manually create new leads.
New Leads	Access the New Leads screen.
Can Assign Leads To Him	Marks this user as a salesman — the system recognizes them as someone leads can be assigned to. Required for any user who receives lead assignments.
Force Lead Assign	Assign a lead to any user regardless of hierarchy.
View Lead	Open and view lead details.
Export Leads	Export the leads list.

Permission	Description
Send SMS To Leads	Send SMS messages to leads.
Leads Actions Filter	Access the Leads Actions Filter report.
Convert CIL To Lead	Convert a broker CIL into a lead.
Add Master Additional Field	Add master-level additional fields to leads.
Manage Unit Updates	Manage unit updates from the lead/sales context.
Show Unit Updates	View unit updates.
Check In	Use the check-in feature on a lead.
Search FB / LinkedIn / Truecaller	Search for a lead's info on external platforms.
Assigned To Client Requests	Assign client requests to yourself.
QR Mail	Send QR code by email.
Force Sales List and Lead View	View all leads and sales regardless of hierarchy.
View Leads History	View the reassignment and action history of a lead. By default not visible — needed when a lead was reassigned from another salesman and you need to see its prior history.
Migrate Leads	Move leads between users or branches.
Change Lead's Lead ID	Change the marketing Lead ID attached to a lead.
Export Lead Action Filter	Export results from the Leads Actions Filter.
Delete Lead Comments	Delete comments left on a lead.
Move Leads To Trash	Send leads to the trash.
Change Lead Branch	Change the branch a lead is associated with.
Leads Bulk Action	Perform bulk actions on multiple leads at once.
Lead State On Create	Set a lead's state at the time of creation.
Force Lead Actions	Perform lead actions regardless of hierarchy restrictions.
Country Codes Control	Manage country code settings for lead phone numbers.
Delete Additional Field	Delete custom additional fields.
CIL Reminder Button	Show the CIL reminder button on a lead.
Who Can See Lead Creator	Controls visibility of the lead creator field.
Who Can See Lead Creation Date	Controls visibility of the lead creation date.
Unassigned Leads	Access the Unassigned Leads section.
Manual Withdraw Leads	Manually withdraw a lead from a salesman.
List Unassigned Leads	View the list of unassigned leads.
List Withdraw Leads	View the list of withdrawn leads.

Permission	Description
Add Additional Field	Add custom additional fields to leads.
Show Broker Info In Lead Profile	See broker information displayed on a lead's profile.
Display Lead Source	See the marketing source/Lead ID information on a lead.
View Assignment Type	See how a lead was assigned — manually, reassigned, or via rotation.
Create a Client by Adding/Uploading Lead	Create a client profile directly when adding or uploading a lead.
Lead Tracking	For marketing users outside the hierarchy tree — allows them to see the leads they created and track what happened to them, without needing to be in the sales tree.
Change Broker Info on Lead	Edit the broker details attached to a lead.
Call Logs In Lead Profile	View call logs from inside the lead profile.
Reassign History Control	When reassigning a lead, choose whether to carry over the previous history or start fresh.

Brokerage

Permission	Description
List Brokers	View the active brokers list.
Create Brokers	Add new broker companies.
Edit Broker	Edit broker company details.
Delete Broker	Delete broker companies.
Create Brokers CIL	Submit a CIL on behalf of a broker.
Broker CILs	View broker CILs.
View All Brokers CILs	View CILs from all brokers regardless of assignment.
Change Broker State From Pending	Approve a broker from Pending status.
Discard Broker Request	Reject/discard a broker request.
Reset Brokers Credentials	Reset a broker's login credentials.
Delete CIL	Delete a CIL.
Brokers Approval	Approve pending broker companies.
Send Broker Emails	Send bulk emails to broker companies.
Export Brokers Table	Export the brokers list.

Permission	Description
Export Brokers Requests Table	Export broker requests.
Force List Brokers	View all brokers regardless of assignment.
Archive Broker Credit	Archive a broker's credit record.
Add Comment On Broker Profile	Add a comment to a broker's profile.
Delete Comment On Broker Profile	Delete a comment from a broker's profile.
Add New Broker Request	Submit a new broker request.
Manage Broker Agents	Add and manage agents under a broker company.
Manage Activity Type	Manage broker activity types.
Edit Broker Activity	Edit a broker activity record.
Delete Broker Activity	Delete a broker activity record.
Add Broker Lead	Add a lead through the Brokerage module.
List Broker Agent	View broker agents.
Assign Brokers	Assign broker companies to indirect sales users.
Force Assign Broker	Assign brokers regardless of hierarchy.
Receive Broker	Marks this user as eligible to receive broker company assignments — identifies this user as an indirect sales person that broker companies can be assigned to.
Pending Brokers List	View the pending brokers list.
Block Broker	Block a broker company.
Unblock Broker	Unblock a broker company.
Bulk Delete Brokers	Delete multiple brokers at once.
Bulk Block Brokers	Block multiple brokers at once.
Bulk Assign Brokers	Assign multiple brokers at once.
Bulk Active Brokers	Activate multiple brokers at once.
Force Broker History	View a broker's full history regardless of assignment.
Export Brokers	Export broker data.
Broker Analysis In Broker Profile	View the analysis section on a broker's profile.
Force Broker Analysis In Broker Profile	View broker analysis regardless of assignment.
Brokers Activities List	View the broker activities list.
Force Broker Activities List	View all broker activities regardless of assignment.
Add New Activity	Add a new activity on a broker.
Receive Activity	Receive activity assignments.

Permission	Description
Assign Activity	Assign activities to team members.
Force Assign Activity	Assign activities regardless of hierarchy.
Manage Activity	Full management of broker activities.
Export Activity	Export broker activity data.

Marketing

Permission	Description
Manage Sources	Create and manage lead sources.
Manage Applinks	Manage app links.
Manage Campaigns	Create and manage marketing campaigns.
Compose Emails	Send bulk email campaigns.
Compose SMS	Send bulk SMS campaigns.
Export Campaign	Export campaign data.
Customize Landing Page	Edit the landing page configuration.
Edit Lead ID	Edit an existing Lead ID.
Block Lead ID	Block a Lead ID from receiving new leads.
Duplicate Lead ID	Duplicate an existing Lead ID.
Change Landing Page Thanks URL	Change the redirect URL after a landing page form submission.
Force Show All Lead IDs	View all Lead IDs regardless of assignment.

CC & CS (Call Center & Customer Service)

Permission	Description
Call Center	Access the Call Center module.
Customer Service	Access the Customer Service module.

Permission	Description
Manage Tickets	Full ticket management access.
Create Ticket Call Center	Create a ticket from the Call Center.
Export Call Center	Export Call Center data.
Filter Call Center	Use filters in the Call Center.
Export Tickets	Export the tickets list.
Ticket Show	View ticket details.
Delivery Updates	Access and manage Delivery Updates.
Call Center Recall	Use the Recall feature in the Call Center.
Call Center Add New Lead	Add a new lead from the Call Center.
Ticket Note	Add notes to tickets.
Show New Tickets	Access the View New Tickets screen (unassigned tickets).
Convert Just-Asking To Lead	Convert a Just Asking entry into a full lead.
See All Tickets	View all tickets in the system regardless of assignment or visibility mode.
Client Action Filter	Access the client action filter.
Force Ticket Assign	Assign tickets to any user regardless of hierarchy or ticket type assignment.
Delete Note	Delete a note from a ticket.
Show Client Tickets	View tickets from inside a client profile.
Edit Tickets	Edit ticket details.
Delete Ticket	Delete a ticket.

General

Permission	Description
Notes	Add and view general notes.
Public Search	Use the public search feature across the CRM.
Database Backup	Create a database backup.
Files Backup	Create a files backup.
Restore Database Backup	Restore from a database backup.
Delete Backups	Delete backup files.

Permission	Description
View Trash	View deleted items in the trash.
Restore From Trash	Restore items from trash.
Permanent Delete	Permanently delete items from trash.
Download Backup	Download a backup file.

Tasks

Permission	Description
Manage Tasks	Full task management access.
Create Tasks	Create new tasks.
Edit Tasks	Edit existing tasks.
Delete Tasks	Delete tasks.
Assign Tasks	Assign tasks to team members.
Tasks Calendar	View tasks in calendar view.

Reports

Permission	Description
Force Report	View all reports regardless of hierarchy.
View Salesmen Summations Reports	Salesman performance summary report.
View Branches Summations Reports	Branch performance summary report.
View Projects Summations Reports	Project performance summary report.
View Salesmen According To States Report	Salesmen breakdown by lead state.
View Salesmen According To States Graph Report	Graph version of salesmen by lead state.
View Salesmen According To Classes Report	Salesmen breakdown by lead class.
View Salesmen Leads States According To Lead ID Report	Lead states per salesman broken down by Lead ID.
View Salesmen According To Unit Steps Report	Salesmen performance across pipeline steps.
View Salesmen Actions According To States Report	Salesman actions broken down by state.

Permission	Description
View Lead Rates Report	Lead conversion rate report.
View Total Number Of Leads Per Lead ID Graph Table Report	Leads per Lead ID — graph and table.
View Total Number Of Leads Per Lead ID Last Month Graph Table Report	Same as above but for last month.
View Total Number Of Leads On Campaigns Per Lead ID Report	Leads per campaign broken down by Lead ID.
View Total Number Of Leads Per Source Graph Table Report	Leads per source — graph and table.
View Sources Per States Chart Report	Lead sources broken down by state — chart view.
View Total Number Of Leads On Source Per Lead ID And States Report	Source performance by Lead ID and state.
View Marketing Analysis Report	Full marketing analysis report.
View Sold Units Report	Report on sold units.
View Done Deals According To Project Report	Done deals broken down by project.
View Salesmen States According To Projects Report	Salesman states by project.
View Projects According To Leads States Report	Projects broken down by lead state.
View Project Spent Leads Count Report	Leads spent per project.
View Projects Rates Report	Conversion rates per project.
View Salesman Actions Summation	Summary of actions taken per salesman.
Salesman Performance Report	Detailed salesman performance report.
Account Manager to Brokers Report	Account manager performance across their broker portfolio.
Brokers Per Leads Report	Broker performance broken down by leads.
EOI Analysis Report	EOI activity and conversion report.
States Group Report	Leads broken down by states group.
Call Logs Report	Call activity report.

Broker CRM

Permission	Description
Select All	Grants all Broker CRM permissions at once.
Edit My Owners	Edit owners assigned to the current user only.

Permission	Description
Send Leads	Send leads to developer companies via the Sent CILs feature.
Show Resale Unit	View resale unit details.
Create Broker Project	Create new projects in the Broker CRM.
Delete Broker Project	Delete broker projects.
Edit Broker Project	Edit broker project details.
List Broker Project	View the broker projects list.
List Developers	View the developers list.
Create Developers	Add new developer companies.
Edit Developers	Edit developer company details.
Delete Developers	Delete developer companies.
List Owners	View the owners list.
Create Owners	Add new owners.
Edit Owners	Edit owner details.
Delete Owners	Delete owners.
List Project Units	View primary project units.
View Project Units to Client	Show a primary unit to a client (View to Client).
List Project Units Log	View the Project Units History log.
List Resale Units	View the resale units list.
View Resale Units to Client	Show a resale unit to a client (View to Client).
List Resale Units Log	View the Resale Units History log.
Freeze Broker Units	Freeze a primary broker unit to prevent any sales actions on it.
Freeze Resale Units	Freeze a resale unit to prevent any sales actions on it.
Manage Locations	Add, edit, and delete locations in Setup → Locations.
Manage Broker Unit to Client	Manage the View to Client process for broker units.
Create Resale Units	Add new resale unit listings.
Edit Resale Units	Edit existing resale unit listings.
Delete Resale Units	Delete resale unit listings.
Change Transaction Status	Change the status of a resale transaction.
List Transactions	View the transactions list.
List Transactions Wallet	View the transactions wallet.

Permission	Description
Resale Units Accept	Accept a pending resale unit — moves it from Pending to Accepted status.
Compare Resale Units	Use the unit comparison feature on resale units.
Force List Owners	View all owners regardless of assignment or hierarchy.
List My Targets	View the current user's own targets.
Create My Targets	Create personal targets for the current user.
Edit My Targets	Edit the current user's own targets.
Delete My Targets	Delete the current user's own targets.
Force Resale Unit Edit	Edit any resale unit regardless of who created it or who it is assigned to.
Force Resale Unit Delete	Delete any resale unit regardless of assignment.
View Sent CILs Log	View the Sent CILs Log in the Network module.
Show Owners List	View the owners list screen.
Hold Broker Units	Move a primary broker unit to the Hold stage.
Resale Unit Sold by Other	Mark a resale unit as sold by another party outside the CRM.
Owners Bulk Send	Send bulk SMS or email to multiple owners at once.
Change Resale Unit Owner	Change the owner assigned to a resale unit.
Force Show Resale Units	View all resale units regardless of assignment or hierarchy.
Export Developers	Export the developers list.
Export Owners	Export the owners list.

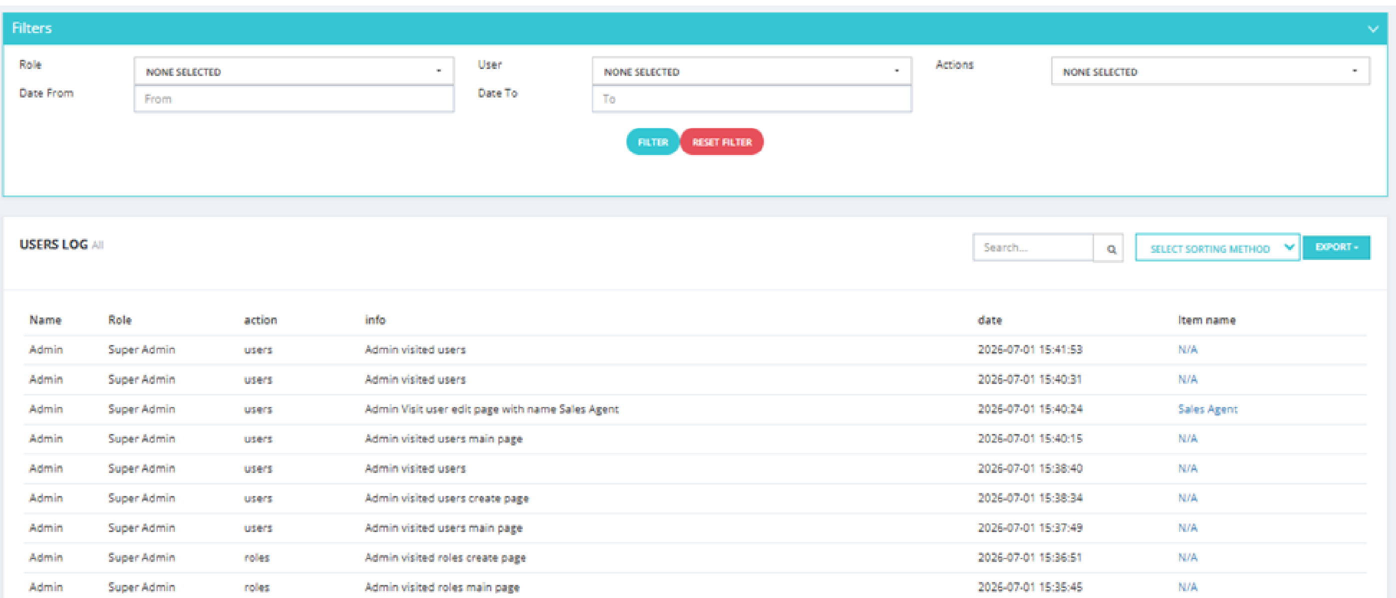
User Logs

Overview

User Logs is a system-wide audit trail that tracks every action taken by every user in the CRM — who did what, when, and on which item. Accessible from **Roles & Users → User Logs**.

What You See

Column	Description
Name	The user who performed the action.
Role	The role assigned to that user.
Action	The module or area where the action took place (e.g., users, roles, leads).
Info	A description of the specific action (e.g., "Admin visited users main page", "Admin Visit user edit page with name Sales Agent").
Date	The date and time the action was recorded.
Item Name	The specific item that was acted on, if applicable (e.g., a user name, a lead name). Shown as N/A if not applicable.



Available Filters

Filter	Description
Role	Filter by the role of the user who performed the action.
User	Filter by a specific user.
Actions	Filter by action type.
Date From / Date To	Filter by date range.

Available Actions

- **Search** — search across the log entries.
- **Select Sorting Method** — change the sort order of results.
- **Export** — export the log as a file.

> □□ Use User Logs to audit system activity, investigate a specific action, or monitor what users are accessing and changing in the CRM.

SMS Logs

Overview

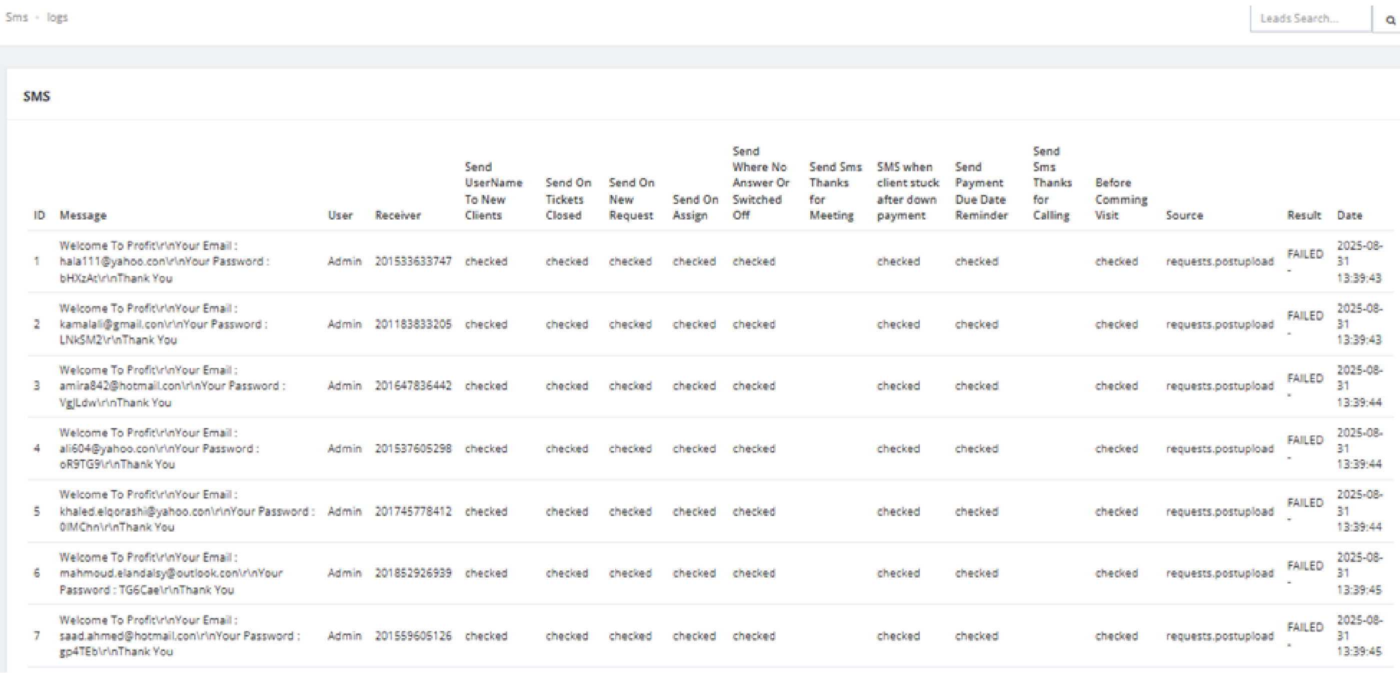
SMS Logs records every SMS message sent through the CRM — showing the message content, who sent it, who received it, what triggered it, whether it was delivered, and when. Accessible from **Roles & Users → SMS Logs**.

What You See

Column	Description
ID	Sequential log ID.
Message	The full content of the SMS sent.
User	The CRM user who triggered the SMS.
Receiver	The phone number the SMS was sent to.
Send Username To New Clients	Checked if this SMS was triggered by the "send credentials to new clients" event.
Send On New Tickets Closed	Checked if triggered when a ticket is closed.
Send On New Request	Checked if triggered when a new request is created.
Send On Assign	Checked if triggered when a lead is assigned.
Send Where No Answer Or Switched Off	Checked if triggered when a client is unreachable.
Send SMS Thanks for Meeting	Checked if triggered after a meeting.
SMS When Client Stuck After Down Payment	Checked if triggered when a client stalls after down payment.
Send Payment Due Date Reminder	Checked if triggered as a payment due date reminder.
Send SMS Thanks for Coming Visit	Checked if triggered after a client visit.
Before Coming Visit	Checked if triggered before a scheduled client visit.
Source	The system event or source that triggered this SMS (e.g., `requests.postupload`).
Result	Whether the SMS was delivered successfully or failed (e.g., FAILED).

Column	Description
Date	Date and time the SMS was sent.

> Use SMS Logs to verify that notification messages are being sent and delivered correctly, or to investigate delivery failures.


Sms › logs

Leads Search...

SMS

ID	Message	User	Receiver	Send UserName To New Clients	Send On Tickets Closed	Send On New Request	Send On Assign	Send Where No Answer Or Switched Off	Send Sms Thanks for Meeting	SMS when client stuck after down payment	Send Payment Due Date Reminder	Send Sms Thanks for Calling	Before Comming Visit	Source	Result	Date
1	Welcome To Profit\r\nYour Email : hala111@yahoo.con\r\nYour Password : bHXzAt\r\nThank You	Admin	201533633747	checked	checked	checked	checked	checked		checked	checked		checked	requests.postupload	FAILED -	2025-08-31 13:39:43
2	Welcome To Profit\r\nYour Email : kamalali@gmail.con\r\nYour Password : LNkSM2\r\nThank You	Admin	201183833205	checked	checked	checked	checked	checked		checked	checked		checked	requests.postupload	FAILED -	2025-08-31 13:39:43
3	Welcome To Profit\r\nYour Email : amira842@hotmail.con\r\nYour Password : VgjLdw\r\nThank You	Admin	201647836442	checked	checked	checked	checked	checked		checked	checked		checked	requests.postupload	FAILED -	2025-08-31 13:39:44
4	Welcome To Profit\r\nYour Email : ali604@yahoo.con\r\nYour Password : oR9TG9\r\nThank You	Admin	201537605298	checked	checked	checked	checked	checked		checked	checked		checked	requests.postupload	FAILED -	2025-08-31 13:39:44
5	Welcome To Profit\r\nYour Email : khaled.elqorashi@yahoo.con\r\nYour Password : 0IMChn\r\nThank You	Admin	201745778412	checked	checked	checked	checked	checked		checked	checked		checked	requests.postupload	FAILED -	2025-08-31 13:39:44
6	Welcome To Profit\r\nYour Email : mahmoud.elandalsy@outlook.con\r\nYour Password : TG6Cae\r\nThank You	Admin	201852926939	checked	checked	checked	checked	checked		checked	checked		checked	requests.postupload	FAILED -	2025-08-31 13:39:45
7	Welcome To Profit\r\nYour Email : saad.ahmed@hotmail.con\r\nYour Password : gp4TEb\r\nThank You	Admin	201559605126	checked	checked	checked	checked	checked		checked	checked		checked	requests.postupload	FAILED -	2025-08-31 13:39:45

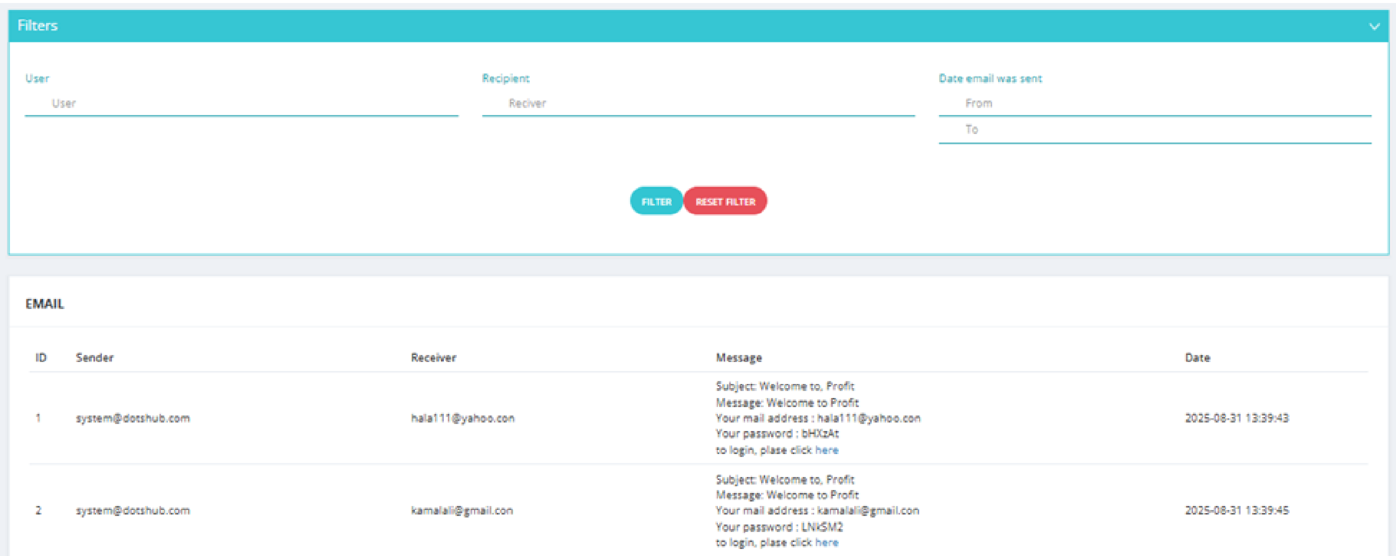
Email Logs

Overview

Email Logs records every email sent through the CRM — showing the sender, recipient, message content, and date. Accessible from **Roles & Users → Email Logs**.

What You See

Column	Description
ID	Sequential log ID.
Sender	The email address the message was sent from (e.g., system@dotshub.com).
Receiver	The recipient's email address.
Message	The full email content — including subject, body, and any login credentials or links sent.
Date	Date and time the email was sent.



Available Filters

Filter	Description
User	Filter by the CRM user who triggered the email.
Recipient	Filter by the recipient's email address.
Date Email Was Sent	Filter by date range (From / To).

> Use Email Logs to confirm that system emails (e.g., welcome emails with credentials, notifications) were sent correctly, or to track email communication history.