

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.

Permission	Description
SMS Logs	View SMS logs.
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.

Permission	Description
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.
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.

Permission	Description
Make Down Payment	Process the down payment step.
Unit Delivery	Mark a unit as delivered.
Un-Deliver Unit	Reverse a unit delivery.
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.

Permission	Description
Pay	Collect a payment (PAY button).
Refund	Process a refund.
Add Payment	Add an extra payment to a unit's plan.
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.

Permission	Description
Add EOI Form	Create a new EOI.
Edit EOI	Edit an existing EOI.
Collect EOI	Process the Collect action on an EOI.
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.

Permission	Description
View Lead	Open and view lead details.
Export Leads	Export the leads list.
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.

Permission	Description
List Unassigned Leads	View the list of unassigned leads.
List Withdraw Leads	View the list of withdrawn leads.
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.

Permission	Description
Send Broker Emails	Send bulk emails to broker companies.
Export Brokers Table	Export the brokers list.
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.

Permission	Description
Add New Activity	Add a new activity on a broker.
Receive Activity	Receive activity assignments.
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
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Call Center	Access the Call Center module.
Customer Service	Access the Customer Service module.
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.

Permission	Description
Delete Backups	Delete backup files.
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.

Permission	Description
View Salesmen Actions According To States Report	Salesman actions broken down by state.
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.

Permission	Description
Edit My Owners	Edit owners assigned to the current user only.
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.

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