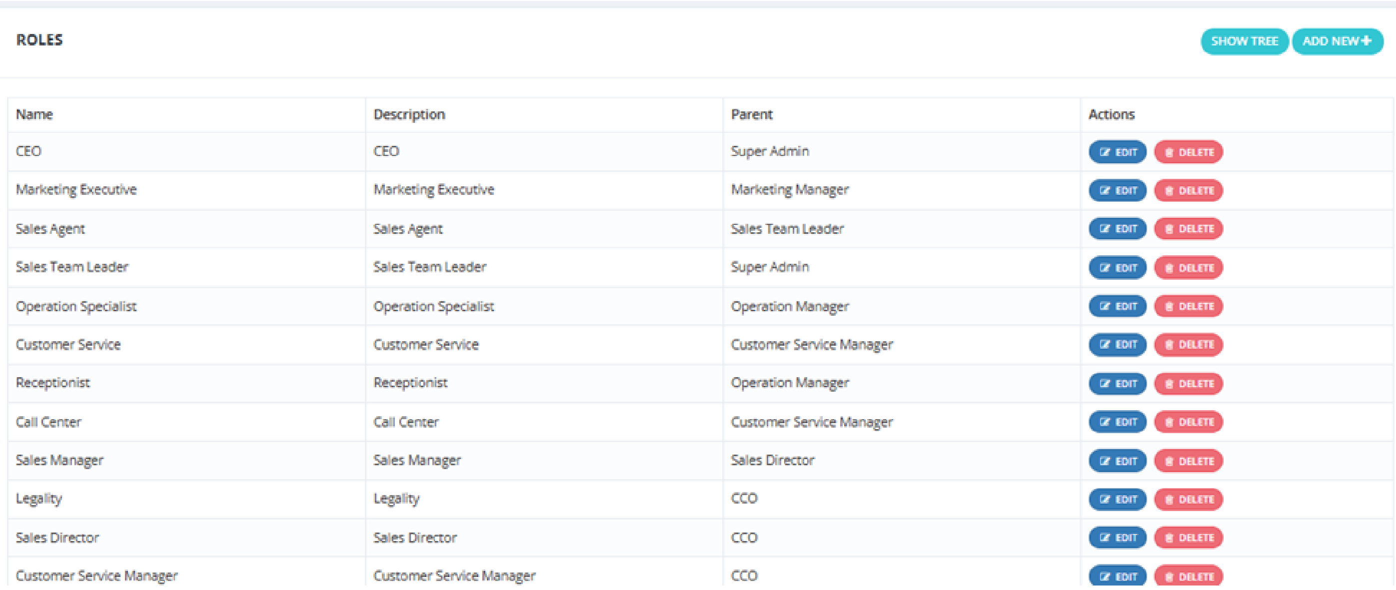
Roles

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

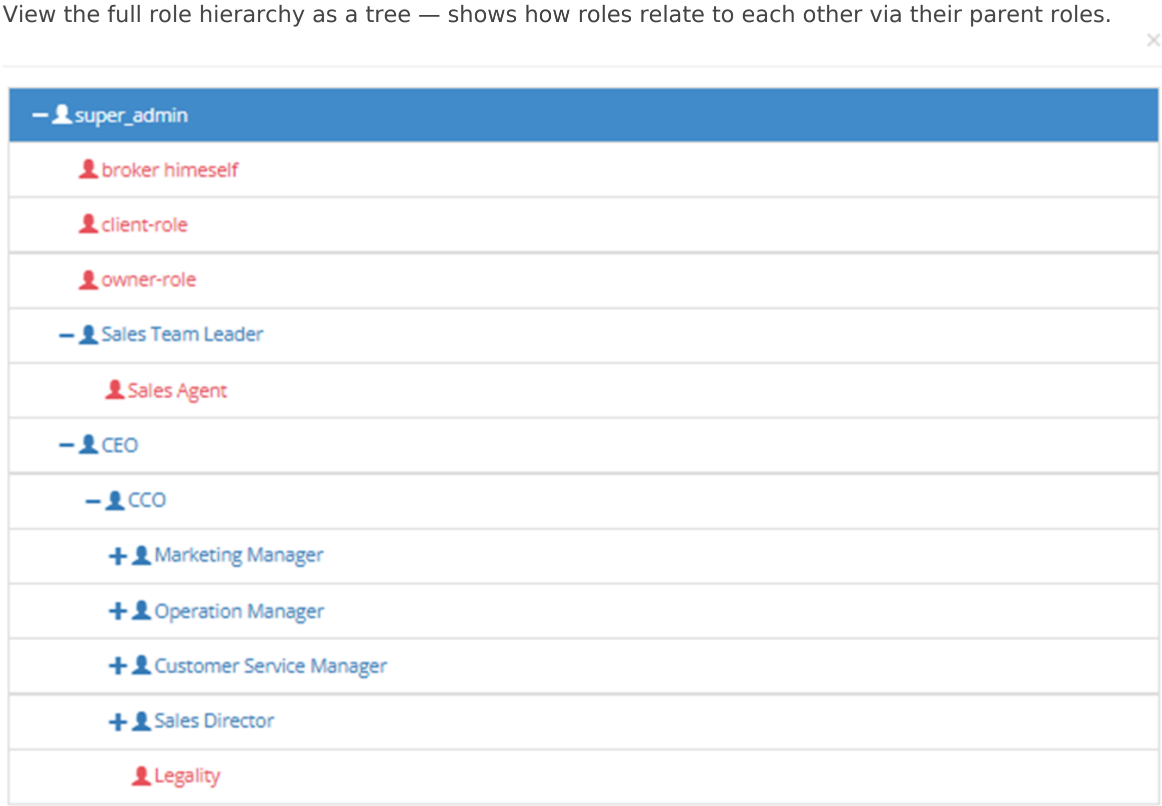
SHOW TREE ADD NEW+

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

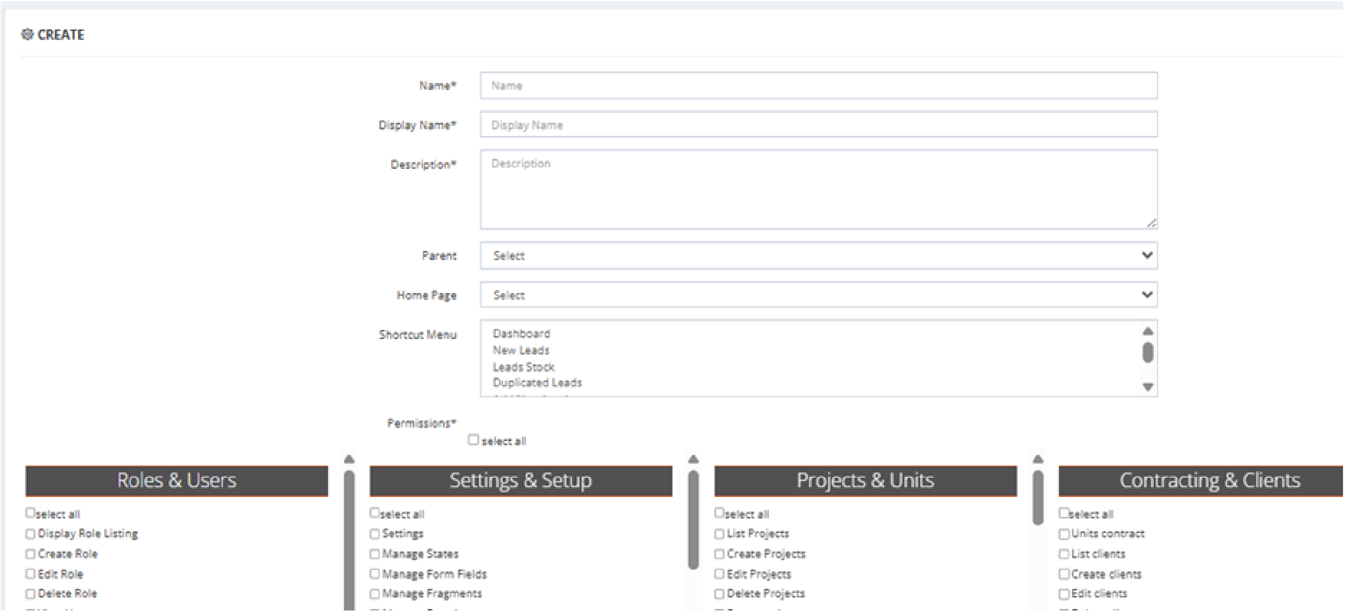
Go to **Roles & Users → Roles**. From here you can:

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.

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