

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
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Show Tree	View the full role hierarchy as a tree — shows how roles relate to each other via their parent roles. ×  <p>The image shows a role hierarchy tree. At the top is 'super_admin' (blue bar). Below it are 'broker himeself', 'client-role', and 'owner-role' (all red). Then 'Sales Team Leader' (blue bar) with 'Sales Agent' (red) below it. Next is 'CEO' (blue bar) with 'CCO' (blue bar) below it. Under 'CCO' are 'Marketing Manager', 'Operation Manager', 'Customer Service Manager', and 'Sales Director' (all blue). At the bottom is 'Legality' (red).</p>
Create Role	Add a new role.

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.

CREATE

Name*

Display Name*

Description*

Parent

Home Page

Shortcut Menu

Permissions* select all

Roles & Users

- select all
- Display Role Listing
- Create Role
- Edit Role
- Delete Role

Settings & Setup

- select all
- Settings
- Manage States
- Manage Form Fields
- Manage Fragments

Projects & Units

- select all
- List Projects
- Create Projects
- Edit Projects
- Delete Projects

Contracting & Clients

- select all
- Units contract
- List clients
- Create clients
- Edit clients

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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