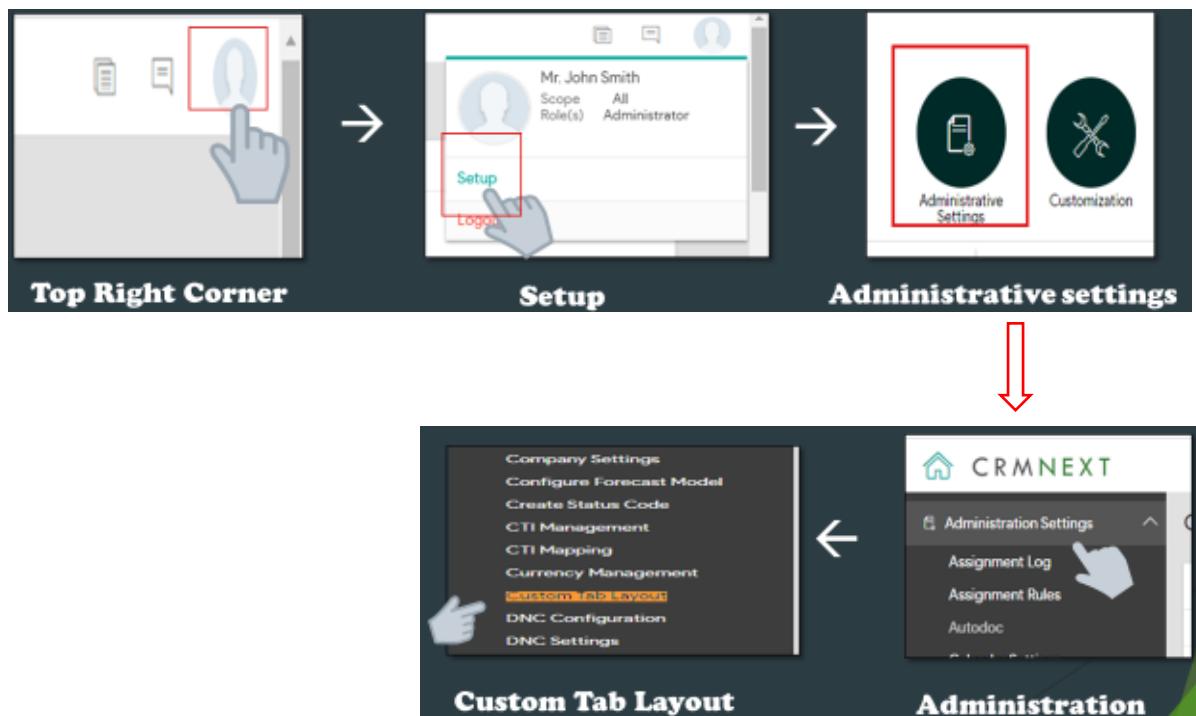
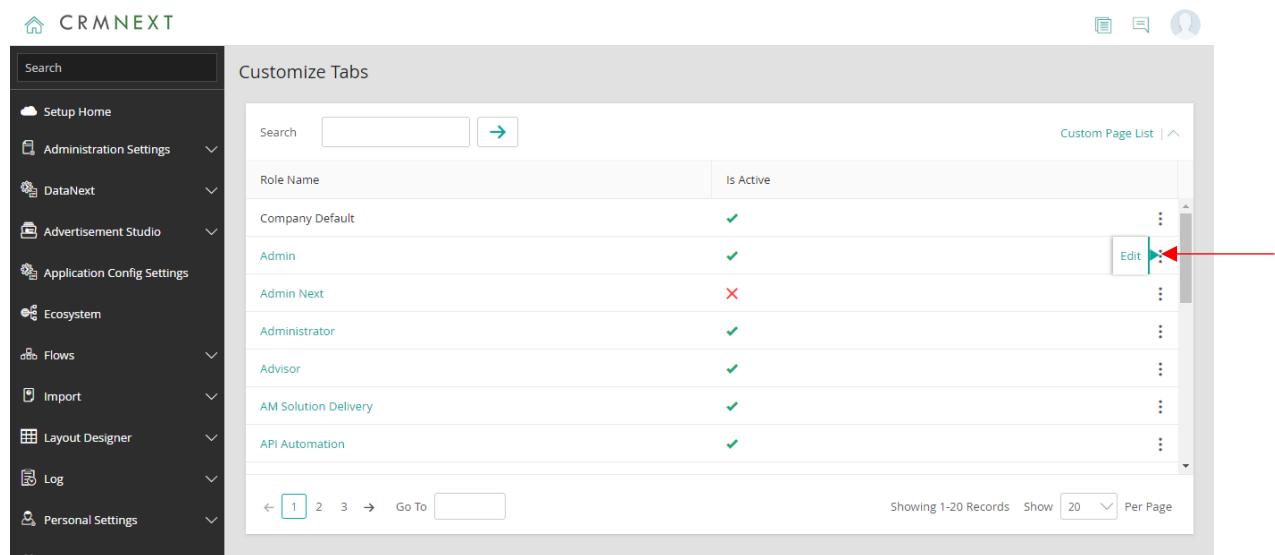


Steps: How to Give Access for an Object on a Particular Role

Step 1: Go to Administrative settings and click on Custom Tab Layout.

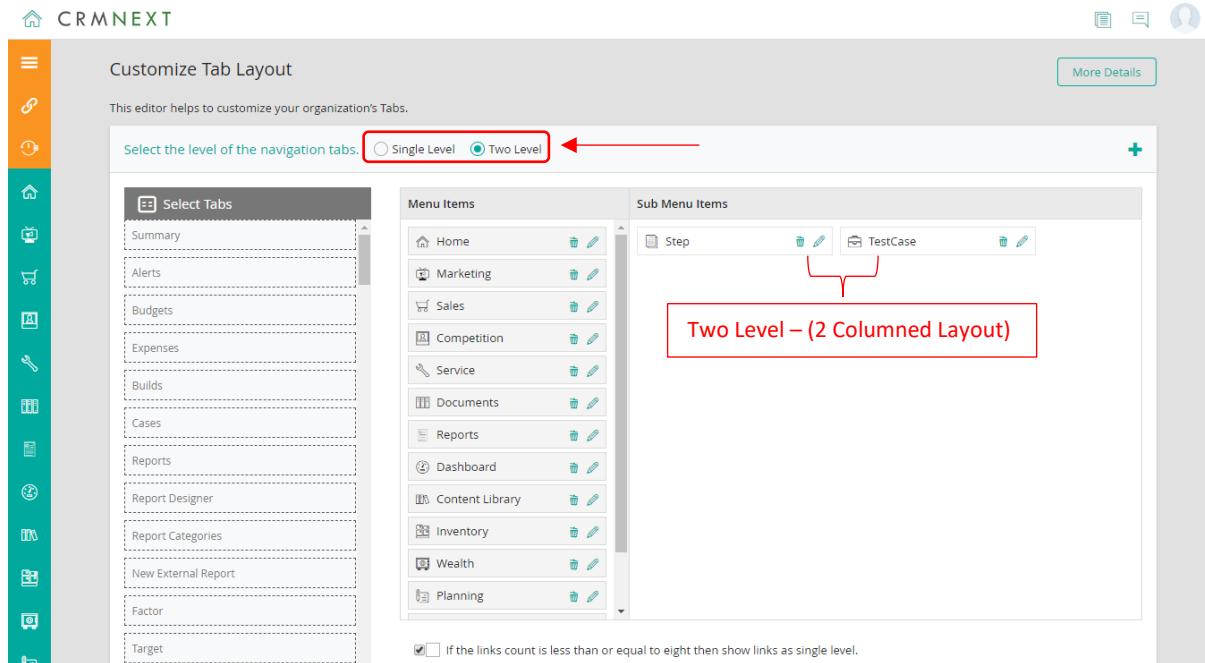


Step 2: After clicking on Custom Tab Layout, respective custom page is opened in which list of roles are defined. Select the Role to which object accessibility must be given.



Role Name	Is Active
Company Default	✓
Admin	✓
Admin Next	✗
Administrator	✓
Advisor	✓
AM Solution Delivery	✓
API Automation	✓

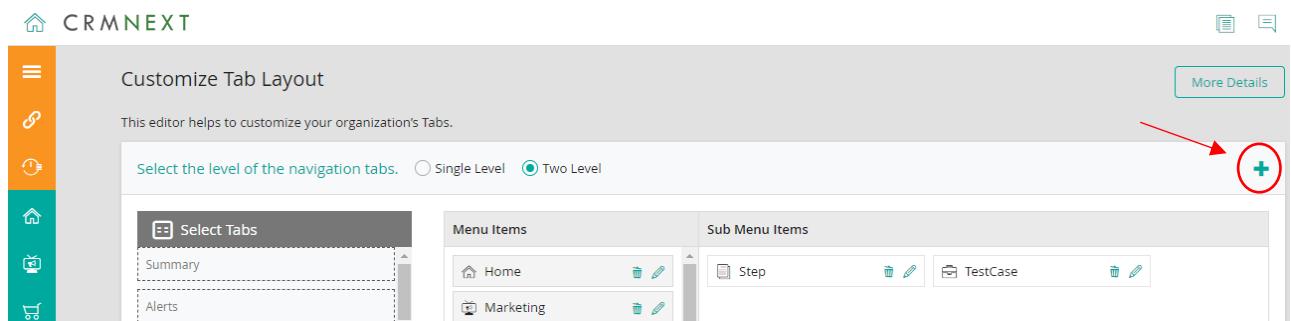
Step 3: Select the role, let us say I want to give access to the Admin Role. Go to three dots on right, as mentioned in the above figure and click on Edit. This will redirect to Admin Custom Tab Layout.



The screenshot shows the 'Customize Tab Layout' page. On the left, there's a sidebar with various icons. The main area has a title 'Customize Tab Layout' and a sub-instruction: 'This editor helps to customize your organization's Tabs.' Below this is a section titled 'Select the level of the navigation tabs.' with two radio buttons: 'Single Level' (unchecked) and 'Two Level' (checked). A red arrow points to the 'Two Level' button. To the right, there are two columns: 'Menu Items' and 'Sub Menu Items'. Under 'Menu Items', there are 12 items: Home, Marketing, Sales, Competition, Service, Documents, Reports, Dashboard, Content Library, Inventory, Wealth, and Planning. Under 'Sub Menu Items', there is one item: Step, which has a sub-item named 'TestCase'. A red box highlights the 'Two Level – (2 Columned Layout)' text. At the bottom, there's a checkbox: 'If the links count is less than or equal to eight then show links as single level.' followed by a checked checkbox icon.

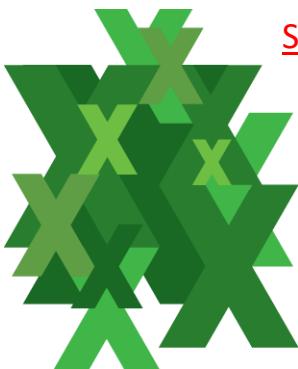
Step 4: Select the type of level you want to have in the layout. (i.e Single level or two level).

Step 5: In menu items, view of all the contents in the menu are displayed and can be edited accordingly. Here, the view of the main menu and its sub menu can be edited or arranged accordingly.



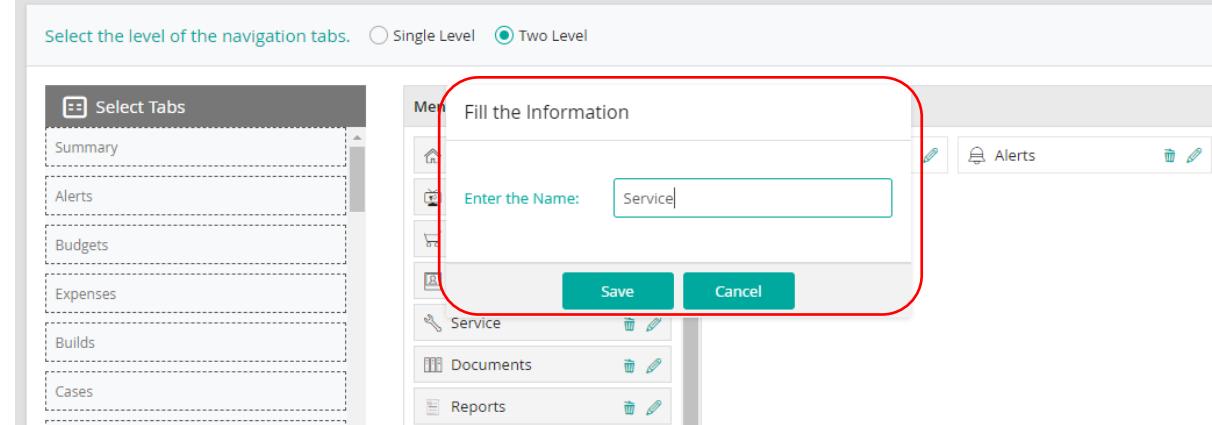
This screenshot shows the same 'Customize Tab Layout' interface, but the 'Two Level' option is now unchecked, and the 'Single Level' option is selected. A red arrow points to the '+>' button on the right side of the main content area, which is used for adding new menu items.

Step 6: To add a new menu item, go to “+” button on the right and click it. A small new window is popped up. Name the new menu item. As shown in figure given below. (Let us say I name it as *Service*)



Customize Tab Layout

This editor helps to customize your organization's Tabs.



Select the level of the navigation tabs. Single Level Two Level

Select Tabs

- Summary
- Alerts
- Budgets
- Expenses
- Builds
- Cases

Fill the Information

Enter the Name:

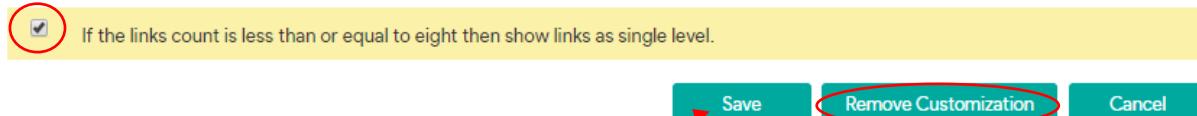
Save Cancel

Service

Documents Reports

Step 7: Remove Customization: Using this we can reset all the customization and return to system default.

If total menu items are 8 or less than 8, then it will remain as single level as a default view.



If the links count is less than or equal to eight then show links as single level.

Save Remove Customization Cancel

Step 8: Else, Save the Changes by clicking on the save button.

