Roles & Permissions Module

Table of Contents

1. [Data-sharing Rules 2](#_Toc387850131)
2. [View List of Roles 3](#_Toc387850132)
3. [Add or Edit Role 4](#_Toc387850133)
4. [View List of Teams 6](#_Toc387850134)
5. [Add or Edit Team 7](#_Toc387850135)

# Data-sharing Rules

**Functional Description**

This view allows the Administrator to determine how records are shared among Users (if at all).

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Campaigns | Toggle | Default options in this order:   1. Company 2. Team 3. None |  |
| Actions | Toggle | Default options in this order:   1. Private 2. Public |  |
| Notes |  | Default options in this order:   1. Private 2. Public |  |
| Tours |  | Default options in this order:   1. Private 2. Public |  |
| Contacts | Toggle | Default options in this order:   1. Company 2. Team 3. None |  |
| Opportunities | Toggle | Default options in this order:   1. Company 2. Team 3. None |  |
| Actions | Toggle | Default options in this order:   1. Private 2. Public |  |
| Notes |  | Default options in this order:   1. Private 2. Public |  |
| Reports | Toggle | Default options in this order:   1. Company 2. Team 3. None |  |

**Actions or Controls**

None

**Navigation Options**

None

**Exceptions**

None

**Notes and Issues**

1. Need to define pre-configured rules

# View List of Roles

**Functional Description**

This view displays one or more Roles in tabular form.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Role Name | Link | Link to Role |  |
| Description | Text |  |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Edit | Icon | Associated with a record |  |
| Duplicate | Icon | Associated with a record |  |
| Delete | Icon | Associated with a record | Need to create mechanism to reassign users before deleting a role |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| [Add](#_Add_or_Edit) Role | Link |  |
| Duplicate Role | Link |  |
| [Delete Role](#_Add_or_Edit_1) | Link |  |

**Exceptions**

None

**Notes and Issues**

1. Need to create mechanism to reassign users before deleting a role
2. Need to define pre-configured roles, such as
   1. Administrator
   2. Sales
   3. Sales – Read Only
   4. Marketing
   5. Marketing – Read Only

# Add or Edit Role

**Functional Description**

This view allows the User to create or edit a Role.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Role Name\* | Textbox |  | Unique Role Name |
| Description | Textbox |  |  |
| **Permissions** | | | |
| Administration | Toggle | Default options in this order:   1. Full Access 2. No Access |  |
| Automation | Toggle | Default options in this order:   1. Full Access 2. Read Only 3. No Access |  |
| Campaigns | Toggle | Default options in this order:   1. Full Access 2. Read Only 3. No Access |  |
| Send Campaigns | Toggle | Default options in this order:   1. Yes 2. No |  |
| Contacts | Toggle | Default options in this order:   1. Full Access 2. Read Only 3. No Access |  |
| Send Email | Toggle | Default options in this order:   1. Yes 2. No |  |
| Send Texts | Toggle | Default options in this order:   1. Yes 2. No |  |
| Import Contacts | Toggle | Default options in this order:   1. Yes 2. No |  |
| Export Contacts | Toggle | Default options in this order:   1. Yes 2. No |  |
| Opportunities | Toggle | Default options in this order:   1. Full Access 2. Read Only 3. No Access |  |
| Forms | Toggle | Default options in this order:   1. Full Access 2. Read Only 3. No Access |  |
| Landing Pages | Toggle | Default options in this order:   1. Full Access 2. Read Only 3. No Access |  |
| Reports | Toggle | Default options in this order:   1. Full Access 2. Read Only 3. No Access |  |
| [Standard Report Name] | Toggle | Default options in this order:   1. Full Access 2. No Access |  |

**Actions or Controls**

None

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Save Role | Dropdown Link | O |
| Save Role As | Link |  |
| Delete Role | Link |  |

**Exceptions**

None

**Notes and Issues**

None

# View List of Teams

**Functional Description**

This view displays one or more Teams in tabular form.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Team Name | Link | Link to Team |  |
| Description | Text |  |  |
| Members | Button | Display X number of Members  Display as buttons with icons to delete Members without accessing the detail view |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| More… | Link | Associated with a record  Display if more than X number of Members |  |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Add Team | Link |  |
| Duplicate Team? | Link |  |
| Delete Team | Link |  |

**Exceptions**

None

**Notes and Issues**

None

# Add or Edit Team

**Functional Description**

This view allows the Administrator to add or edit a Team.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Team Name\* | Textbox |  | Must be unique |
| Description | Textarea |  |  |
| [User’s Full Name] | Icon | Display icon that toggles between a selected and non-selected state |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Search | Textbox | Filters list of Users |  |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Save Team | Link |  |
| Save Team As? | Link |  |
| Delete Team | Link |  |

**Exceptions**

None

**Notes and Issues**

None