Roles & Permissions Module

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# Data-sharing Rules

**Functional Description**

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

Items created by a User may be shared with all Users, or they may be kept private.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Campaigns | Toggle | Default options in this order:   1. Shared 2. Private |  |
| Actions | Toggle | Default options in this order:   1. Shared 2. Private |  |
| Notes | Toggle | Default options in this order:   1. Shared 2. Private |  |
| Tours | Toggle | Default options in this order:   1. Shared 2. Private |  |
| Contacts | Toggle | Default options in this order:   1. Shared 2. Private |  |
| Opportunities | Toggle | Default options in this order:   1. Shared 2. Private |  |
| Actions | Toggle | Default options in this order:   1. Shared 2. Private |  |
| Notes | Toggle | Default options in this order:   1. Shared 2. Private |  |
| Reports | Toggle | Default options in this order:   1. Shared 2. Private |  |

**Actions or Controls**

None

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Save Data Sharing | Link |  |

**Exceptions**

None

**Notes and Issues**

1. Default all options to ‘Shared’
2. If an item is marked ‘Shared’, then any User with access to the module can access the item
3. If an item is marked ‘Private’, then only the item’s creator can access the item—other Users cannot access the item. However, there is one exception based on Role configuration. See ‘Add or Edit Role’ for more information.

# Preconfigured Roles

**Functional Description**

The initial release of SmartTouch will include preconfigured roles as defined in ‘Appendix to Interface Specifications - Roles & Permissions - Beta.xlsx’

Access to each Module will be set to Full Access, Read Only, or No Access. The only exception is Administration, which only allows Full Access or No Access.

Each Module may contain certain functionality that may be restricted by setting a flag equal to On/Off or Yes/No.

Note the special functionality in Contacts and Opportunities that allows a Sales – Administrator manager-level access to Contacts and Opportunities. This functionality overrides Data Sharing rules to ensure that a Sales – Administrator may access Sales Users’ Contacts and Opportunities—regardless of Data Sharing rules.

**Notes and Issues**

1. See ‘Appendix to Interface Specifications - Roles & Permissions - Beta.xlsx’ for the following pre-configured roles:
   1. Administrator
   2. Marketing
   3. Marketing – Read Only
   4. Sales
   5. Sales – Read Only
   6. Sales – Administrator
2. Access to Modules is either Full Access, Read Only, or No Access, which are defined as:
   1. 'Full Access' means CRUD (create, read, update, and delete) functionality to all objects associated with the Module. In the case of Contacts, Full Access includes contact information, notes, actions, tours, and relationships. In the case of Opportunities, Full Access includes notes and actions.
   2. 'Read Only' means the User may view but not edit objects associated with the Module. In the case of Contacts, Read Only includes contact information, notes, actions, tours, and relationships. In the case of Opportunities, Read Only includes notes and actions.
   3. ‘No Access’ means no access ☺