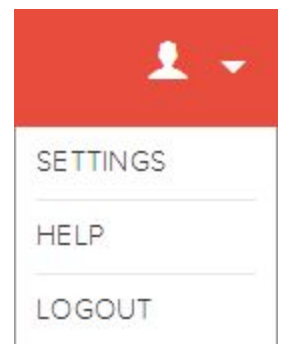# Users & Permissions

Account Owner / Admin

Today's training is mostly for those users that work with team members. It is important to setup the correct sub-user permissions before you start using your system. Realvolve has the ability to have multiple "sub-users" for each account. As the Administrator of your account, you can setup the sub-users as you see fit. Administrators have full access to all contacts, properties, transactions, workflows and templates for all sub-users. However, you may not want your sub-users to have full access to everything in your account so we allow you to edit permissions for each sub-user. To add sub-users to your account, go to the system menu in the upper right corner and click on the down arrow to show the drop down menu for **SETTINGS**.

In the Settings area on the left side, choose **Users & Permissions** then follow the steps below:

1. Click on the **Invite A New User** button to display the Send Invitation box.
2. Enter the **First Name**, **Last Name** and **Email Address** of the user to be added.
3. Press **Send An Invitation**.

NOTE: Repeat steps 1-3 for each sub-user you need added to your system.

Once the invitation has been sent, have the sub-user check their email and follow the link to finish the setup process. It will allow them to assign their own password for accessing the system in the future using their own email address and the password they supply.

By Default all sub-users have very basic access - they can READ, CREATE, UPDATE and DELETE their own records in the database. To allow the sub-user to have more rights, simply locate the sub-user's name in the Users & Permissions section and click on the "**Click here to configure security permissions**" link.

If this user needs access to VIEW all data in all sections for all users then simply place a check in the "For all users" access checkbox in the READ access row. If this user also needs the ability to update data of other users then do the same for the UPDATE access row. Finally if the

user also needs the ability to delete data then place the check in the DELETE access row. Some users may need to be able to see records but not update or delete while other users need full access to everything.

You will notice that the first column says "**All Sections**" - you can leave the "For all users" checkboxes blank and only give the user full access to specific sections like "**Contact**", "**Property**", "**Transaction**", "**Workflow**", "**Template**", "**Tasks**" which is calendar, "**Documents**", "**Notes**". To do this click on the "Add New" button above the table and the system will add a new row to the table... Select the section you want the sub-user to have access to and then the specific access right "Read","Create","Update","Delete" and if desired for all users or not using the "For all users"

Example: You have an assistant that comes in part time to work on workflows and helps your other agents with workflows. You don't want her to see, edit or delete any contacts, properties, etc that are not her own so you leave the "For all users" blank for the "All Sections" then do the following:

1. Click on "**Add New**" , choose Type: "**Workflow**", Access: "**Read**", **check** "For all users"
2. Click on "**Add New**" , choose Type: "**Workflow**", Access: "**Create**", **check** "For all users"
3. Click on "**Add New**" , choose Type: "**Workflow**", Access: "**Update**", **check** "For all users"
4. Click on "**Save Permissions**" to save the changes to the table.

Now the sub-user will have the rights to Read, Create, Update workflows for all users but will not have the right to delete their workflows.

NOTE: One key point when dealing with sub-users and rights to Properties and Transactions. If you do not give your sub-users rights to your properties and transactions but need them to have access to specific addresses then simply assign an Activity to the sub-user connected to that property. This will automatically give the sub-user access to the address since they were granted privileges to the activity.

Additional rights for **Google Sync**, **Import** and **Export, Merge Duplicates, Team Reporting and Tags** have to be given individually, simply use the check the boxes which are needed.

Users & Permissions Video: [CLICK HERE](#)

- Google Sync - Allow this user to sync with Google. Only those contacts which are owned by the user will sync.
- Import - Allow this user to import contacts from a CSV file or Twitter Account.
- Export - Allow this user to export contacts to a CSV file.

If you have any questions, please contact us at: support@realvolve.com

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