User Profiles and Tab Settings

Suggestions for setting up User Profiles

Each company using improveit 360 is unique in many ways, including the tasks their individual employees may need to carry out in the improveit 360 system. However, a common theme of system usership can be found among key functions, such as Sales Reps, Accounting and Foremen. This document provides a list of improveit 360 User and Tab Settings for the most common job functions we've seen throughout home improvement companies. Each group of User Settings is called a *Profile*. You can set your company's *Profiles* as indicated in this document or choose to customize the settings, based on your Staff's specific roles and responsibilities.

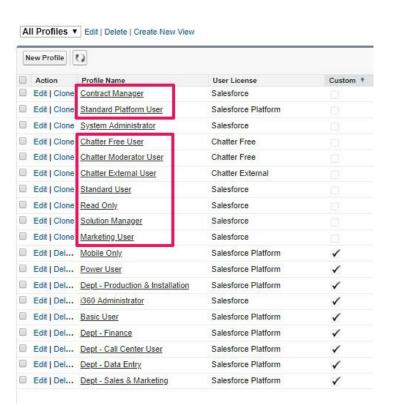
Before your company's Go-Live date, review each user's Profile settings to ensure your Staff has access to the Objects needed to carry out their day-to-day responsibilities. Schedule time with your improveit 360 Onboarding Specialist to discuss these settings, particularly if you find that your Staff has roles and responsibilities not outlined in this document.

How to Access and Edit User Profiles

Only your improveit 360 System Administrator can make changes to User Profiles. Click the *Username* in the upper-right corner of the screen, click *Setup* from resulting dropdown. On new left sidebar, click the arrow next to *Manage Users* to expand the Manage Users menu. Click on *Profiles*. Once the Profiles appear on the right, select which Profile you want to edit and click on *Edit* to the left of the corresponding Profile. By Object, you can then check or uncheck based on that Profile's access needs.

Some User Profiles will not be used

There are several User Profiles that come natively with any Salesforce or improveit 360 system. These Profiles cannot be Deleted and your company most likely will not utilize any of the Profiles outlined below in red. You may disregard these Profiles when creating or editing Profiles within your improveit 360 system.



User Profiles... con't

Understanding Custom Object Permissions

When in Profile edit mode, you will see checkboxes for the following permissions that you can check or uncheck based on your company's needs:

- Read User can View records from this Custom Object (example: User can View Appointments)
- Create User can Create new records from this Custom Object (example: User can Schedule new Appointments)
- Edit User can Edit records from this Custom Object (example: User can Assign an Appointment to a Sales Rep, or mark an Appointment as Confirmed)
- **Delete*** User can Delete records from this Custom Object (example: User can Delete an Appointment) *Note: Delete capabilities only recommended for Mangers or the System Administrator
- View All User can View All records from this Custom Object (example: If you are hiding Appointments from other Sales Reps but the Scheduler needs to see All Appointments, the Sales Rep Profile should NOT have View All but the Appointment Scheduler's Profile should have View All)
- Modify All User can Edit All records from this Custom Object (example: If you have multiple locations and the Appointment Scheduler from one office needs to Confirm Appointments for both locations, the Appointment Scheduler's Profile should have Modify All privileges)

Understanding Custom Tab Settings

Each Custom Object is available as a Tab, with your improveit 360 System Administrator setting the Tabs that can be accessed on the Toolbar based on Profile. Individual users can edit the order and which Tabs they want to see regularly by accessing their All Tabs (+) page. Keep in mind, any changes made to a Profile's Tabs affect all Users with that same Profile. For this reason, group Users together based on their role within your company and limit the number of unique User Profiles as much as possible.

Tab Setting terms: A Tab setting of "*Default Off*" means the Tab is available from the All Tabs (+) page but does not default to the User's Toolbar. The setting "*Default On*" means the Tab is visible in the User's Toolbar as well as on the All Tabs page. The setting of "*Tab Hidden*" means the User will not see the Tab on the All Tabs page and cannot add the Tab to their Toolbar.



Basic User Profile – Custom Tab Settings

Custom Tab Settings About	Tab Hidden ✔	PaySimple Settings	Tab Hidden ✔
Alert Messages	Default On 🗸	Pricebooks	Tab Hidden ✓
Appointment Manager	Tab Hidden ✓	Production Grid	Tab Hidden ✓
Appointments	-	Products	Tab Hidden ✓
Call Queue	Default On 🗸	Project Activities	
Campaign Members	Default On ✓	Project Costs	Default Off V
Campaigns	Tab Hidden ✓	Project Incentives	Tab Hidden ✓
Commission Calculations	Tab Hidden ✓	Projects	Default On V
	Tab Hidden ✓	· · · · · · · · · · · · · · · · · · ·	Default Off ✓
Commission Rules	Tab Hidden ✓	Project Templates	Tab Hidden V
Commissions	Tab Hidden ✓	Prospects	Default On 🗸
Department Dashboards	Tab Hidden ✓	Prospect Searches	Tab Hidden 🗸
DNC Lists	Tab Hidden ✔	Purchase Order Line Items	Tab Hidden ✔
eCommPackages	Tab Hidden ✔	Purchase Orders	Tab Hidden ✓
eCommunications	Tab Hidden ✔	Quote Items	Tab Hidden ✔
eLeads	Tab Hidden ✓	Quotes	Default Off 🗸
Email Content	Default On 🗸	Quote Templates	Tab Hidden ✔
First Time Setup	Tab Hidden ✔	Receipts & Adjustments	Tab Hidden ✔
Hours and Wages	Tab Hidden ✔	Reminder Call Logins	Default On 🕶
Import Template	Tab Hidden 🗸	Sale Items	Default On 🕶
improveit! 360	Tab Hidden 🗸	Sales	Default On 🗸
Inbound Texts	Default On 🗸	Settings	Default On 🗸
Inbound Texts	Tab Hidden ✔	Sources	Tab Hidden 🗸
Interest Selections	Tab Hidden ✔	Staff	Default Off 🗸
Lead Entry	Tab Hidden ✔	Staff Calendar	Default Off 🗸
Lead Sources	Default On 🗸	Surveys	Tab Hidden ✔
Loan Programs	Tab Hidden ✔	Survey Template	Tab Hidden ✔
Loans	Tab Hidden ✔	Time Block Manager	Tab Hidden ✔
Marketing Opportunities	Default Off 🗸	Time Sheets	Tab Hidden ✔
Materials	Default On 🗸	WebRequests	Default On 🗸
Merge Prospects	Tab Hidden ✔	Zip Codes	Default On ▼
My Schedule	Tab Hidden ✔	zProject Expenses_new	Tab Hidden ✔
OAuth Services	Default On 🗸	zProject Milestones_new	Tab Hidden ✔
Open Items	Tab Hidden ✔	zProjects_new	Tab Hidden 🗸
Outbound Texts	Default On 🗸	zProject Tasks_new	Tab Hidden 🗸
Pay Periods	Tab Hidden ✔	zProject Times_new	Tab Hidden 🗸



Basic User Profile – Custom Object Permissions

	Basic Acces				Data Admini			Basic Acces				Data Admini	etration
	Read	Create	Edit	Delete	Vlew All i	Modify All		Read	Create	Edit	Delete	View All	Modify
Alert Messages	✓						Project Activities	✓					
Appointments	2	2	✓		✓		Project Costs						
Appointment Summaries	2	2	✓				Project Incentives						
Batch Jobs	2		✓				Project Templates	✓					
Campaigns	2						Project Template Activities	✓					
Campaign Members	~		✓				Prospects	✓	~	Z		✓	
Campaign Member Action	~		✓				Inbound Texts	✓				✓	
CommCalce							Prospect Searches	✓	✓	~			
Commissions							Purchase Orders						
Commission Adjustments							Purchase Order Line Items						
Commission Calculations							Quotes	~					
Commission Rates	✓	✓	✓	✓			Quote Items	~					
Commission Rules							Quote Templates	~					
Department Dashboards	✓	✓	~				Quote Template Items	~					
DNC Lists	✓						Receipts & Adjustments	~					
eCommPackages							Reminder Calls	~	~	2	✓		
eCommunications							Reminder Call Logins	~	~	~	~		
eLeads	~						Reminder Call Rules	Z	~	Z	~		
Email Content	~	~	~	~			Repeating Time Blocks	Z					
Google Calendar Queue							Sales	Z		2			
Helpers	~	✓	~	~	~	Z	Sale Items	Z	~	~			
Hours and Wages							Search Criteria						
Inbound Texts	✓				~		Sources	Z		2			
Interests	~	2	~	~	~		Source Costs	✓					
Interest Selections	2						Staff	✓	Z	2		✓	
Lead Sources	2	2	Z				Staff Account Transactions						
Lead Source Summaries	✓	✓	✓				Inbound Texts	~				✓	
Loans							Surveys	~				✓	
Loan Programs							Survey Template	~				✓	
Marketing Opportunities	✓	✓	✓				TestObjects	~	<u>~</u>	~	✓	~	U
Materials	~	~	✓	✓			Time Blocks	~					
Merge Candidates							Time Entries						
OAuth Services							Time Records	~	<u>~</u>	~	✓		
OAuth Tokens							Time Sheets						
Outbound Texts	~	✓	~	~			Update Queues	Z	Z				
Pay Periods							Wage Values						
Pay Simple Accounts							WebRequests	Z	<u>~</u>	Z	~		
PaySimple Settings	✓				~		Zip Codes	Z	~	~	✓		
Permits & Utilities	✓	✓	<u> </u>	✓			zProjects_new						
Pricebooks							zProject Expenses_new						
Pricebook Entry							zProject Milestones_new						
Products	~						zProject Taeks_new						
Projects	✓	✓	_				zProject Times_new	_	_	_		_	



Power User Profile – Custom Tab Settings

Custom Tab Settings		B	
About	Tab Hidden ✓	Pay Simple Settings	Tab Hidden ✓
Alert Messages	Default On 🗸	Pricebooks	Tab Hidden ✓
Appointment Manager	Default Off 🗸	Production Grid	Default On 🗸
Appointments	Default On 🗸	Products	Default Off 🗸
Call Queue	Default Off 🗸	Project Activities	Default Off 🗸
Campaign Members	Default On 🗸	Project Costs	Default Off 🗸
Campaigns	Default On 🗸	Project Incentives	Default On 🗸
Commission Calculations	Tab Hidden ✔	Projects	Default On 🗸
Commission Rules	Default Off 🗸	Project Templates	Default Off ➤
Commissions	Default Off 🗸	Prospects	Default On 🗸
Department Dashboards	Tab Hidden ✓	Prospect Searches	Tab Hidden ✔
DNC Lists	Default Off 🗸	Purchase Order Line Items	Tab Hidden ✓
eCommPackages	Tab Hidden ✓	Purchase Orders	Default Off 🗸
eCommunications	Tab Hidden 🗸	Quote Items	Tab Hidden ✔
eLeads	Tab Hidden ✔	Quotes	Default Off 🗸
Email Content	Default On 🗸	Quote Templates	Default Off 🗸
First Time Setup	Tab Hidden ✔	Receipts & Adjustments	Default Off 🗸
Hours and Wages	Default Off 🗸	Reminder Call Logins	Default On 🗸
Import Template	Tab Hidden ✔	Sale Items	Default On 🗸
improveit! 360	Tab Hidden ✔	Sales	Default On 🗸
Inbound Texts	Default On 🗸	Settings	Default On 🗸
Inbound Texts	Tab Hidden ✔	Sources	Default Off 🗸
Interest Selections	Tab Hidden ✔	Staff	Default On 🗸
Lead Entry	Tab Hidden ✔	Staff Calendar	Default On 🗸
Lead Sources	Default Off 🗸	Surveys	Tab Hidden ✔
Loan Programs	Default Off 🗸	Survey Template	Tab Hidden ✔
Loans	Default Off 🗸	Time Block Manager	Default Off 🗸
Marketing Opportunities	Default Off 🗸	Time Sheets	Tab Hidden ✔
Materials	Default On 🗸	WebRequests	Default On 🗸
Merge Prospects	Default Off 🗸	Zip Codes	Default On 🗸
My Schedule	Tab Hidden 🗸	zProject Expenses_new	Tab Hidden ✔
OAuth Services	Default On 🗸	zProject Milestones_new	Tab Hidden ✔
Open Items	Default Off 🗸	zProjects_new	Tab Hidden ✔
Outbound Texts	Default On 🗸	zProject Tasks_new	Tab Hidden ✔
Pay Periods	Tab Hidden ✔	zProject Times_new	Tab Hidden ✔



Power User Profile – Custom Object Permissions

	Basic Acce				Data Adminis	stration		Access				
	Read	Create	Edit	Delete	Vlew All	ModIfy All	Ri	ad Cre	ate	Edit	Dele	te
Alert Messages	✓						Project Activities	2 .	2	~	✓	
Appointments	✓	✓	✓		✓		Project Costs	2 .	2	~	✓	
ent Summaries	~	~	2				Project Incentives)			
Batch Jobs	~	~	2				Project Templates	2 .	2	✓		
Campaigns	✓	✓	✓		~		Project Template Activities	2	2	~	<u>~</u>	
npalgn Membera	✓	✓	~		~		Prospects	2 .	2	✓		
Member Action	2	2	2		Z		Inbound Texts	2 0)			
CommCalca	V	~	2				Prospect Searches	2 6	2	~		
Commissions	Z	Z	Z				Purchase Orders	2 6	2		Z	
Adjustments	<u> </u>	V	~				Purchase Order Line Items	2	2	~	~	
Calculations	<u> </u>	<u> </u>	<u> </u>					2 .		✓	_	
ilssion Rates		<u> </u>	<u> </u>	<u> </u>				2 .		<u> </u>	✓	
ilssion Rules		<u> </u>	<u> </u>	_				2 6		<u> </u>	<u> </u>	
Dashboards		Z	2		0			2 .		Z	Z	
DNC Lists		2	2	∠	☑			2 .		<u> </u>	2	
nmPackages		☑	☑				Beerlades Calle	2		2	<u> </u>	
mmunications	Z	∠	2		0					Z	2	
eLeads		∠	2					2 .		✓	2	
Email Content		□	2					2 .		∠		
ndar Queue				<u>~</u>	0							
Helpera								2		<u> </u>		
and Wages		<u> </u>	<u> </u>	<u> </u>	☑	<u> </u>		2 .		<u> </u>	✓	
bound Texts	✓	✓	✓	✓				2		✓		
Interests	✓				✓			2		✓		
Selections	✓	✓	✓	✓	✓	✓		2 .		✓		
ad Sources	✓	✓	✓		✓		atom a count Tourselfore	2 .		✓		
e Summaries	✓	✓	✓					2		✓		
	✓							2 C				
Loans	✓	✓	✓		0			2 C				
Programs	✓	✓	✓					2 C				
portunities Materials	✓	✓	✓					2		✓	✓	
	✓	✓	✓	✓				2 .		✓	✓	
Candidates	~	✓	✓	~			The Breeds	2 .	2	✓	✓	
uth Services								2 .		2	<u>~</u>	
Auth Tokens								2 .		2	<u>~</u>	
bound Texts	✓	✓	✓	✓				2	2			
Pay Periods	✓	✓	✓					2	2	✓	✓	
a Accounts								2 .	2	~	~	
iple Settings	~				~			2	2	~	✓	
ita & Utilitiea	~	~	✓	~				2	2	~		
Pricebooks								2 .	2	~		
ebook Entry							zProject Milestones_new	2 .	2	✓		
	~	~	~	✓	✓		zProject Taeks_new	2 .	2	2		
Products	<u>~</u>											



Call Center User Profile – Custom Tab Settings

Contain Tab Sattings			
Custom Tab Settings About	Tab Hidden ✔	PaySimple Settings	Tab Hidden ✔
Alert Messages	Default On 🗸	Pricebooks	Tab Hidden ✔
Appointment Manager	Tab Hidden ✔	Production Grid	Tab Hidden ✔
Appointments	Default Off ➤	Products	Tab Hidden ✔
Call Queue	Default On 🗸	Project Activities	Tab Hidden ✔
Campaign Members	Tab Hidden ✔	Project Costs	Tab Hidden ✔
Campaigns	Tab Hidden ✔	Project Incentives	Default On 🗸
Commission Calculations	Tab Hidden ✔	Projects	Tab Hidden ✔
Commission Rules	Tab Hidden ✔	Project Templates	Tab Hidden ✔
Commissions	Tab Hidden ✔	Prospects	Default On 🗸
Department Dashboards	Tab Hidden ✔	Prospect Searches	Tab Hidden ✔
DNC Lists	Tab Hidden ✔	Purchase Order Line Items	Tab Hidden ✔
eCommPackages	Tab Hidden ✔	Purchase Orders	Tab Hidden ✔
eCommunications	Tab Hidden ✔	Quote Items	Tab Hidden ✔
eLeads	Tab Hidden ✔	Quotes	Tab Hidden ✔
Email Content	Default On 🗸	Quote Templates	Tab Hidden ✔
First Time Setup	Tab Hidden ✔	Receipts & Adjustments	Tab Hidden ✔
Hours and Wages	Tab Hidden ✔	Reminder Call Logins	Default On 🗸
Import Template	Tab Hidden ✔	Sale Items	Default On 🗸
improveit! 360	Tab Hidden ✔	Sales	Tab Hidden 🗸
Inbound Texts	Default On 🗸	Settings	Default On 🗸
Inbound Texts	Tab Hidden ✔	Sources	Tab Hidden 🗸
Interest Selections	Tab Hidden ✔	Staff	Tab Hidden ✔
Lead Entry	Tab Hidden ✔	Staff Calendar	Default Off 🗸
Lead Sources	Tab Hidden 🗸	Surveys	Tab Hidden ✔
Loan Programs	Tab Hidden ✔	Survey Template	Tab Hidden ✔
Loans	Tab Hidden ✔	Time Block Manager	Tab Hidden ✔
Marketing Opportunities	Tab Hidden 🗸	Time Sheets	Tab Hidden ✔
Materials	Default On 🕶	WebRequests	Default On 🗸
Merge Prospects	Tab Hidden ✔	Zip Codes	Default On 🗸
My Schedule	Tab Hidden ✔	zProject Expenses_new	Tab Hidden ✔
OAuth Services	Default On 🗸	zProject Milestones_new	Tab Hidden ✔
Open Items	Tab Hidden ✔	zProjects_new	Tab Hidden ✔
Outbound Texts	Default On 🗸	zProject Tasks_new	Tab Hidden ✔
Pay Periods	Tab Hidden 🗸	zProject Times_new	Tab Hidden ✔



Call Center User Profile – Custom Object Permissions

	Basic Acces				Data Adminis	tration		Basic Acces	9			Data Admini	etration
	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All i	Modify A
Alert Messages	~						Project Activities	~	~	~	~	V	✓
Appointments	✓	Z	✓		✓		Project Costs	✓	<u>~</u>	~	✓		
Appointment Summaries	✓	~	~				Project Incentives						
Batch Jobs	✓	V	~				Project Templates	<u>~</u>	~	~			
Campaigns	~	V	~		✓		Project Template Activities	<u> </u>	~	~	~		
Campaign Members	~	~	~		✓		Prospects	<u> </u>	~	~		V	
Campaign Member Action	~	~	~		✓		Inbound Texts	<u> </u>				V	
CommCalca	~	Z	V				Prospect Searches	~	~	~			
Commissions	~	Z	V				Purchase Orders	<u> </u>	~	2	~		
Commission Adjustments	~	2	V				Purchase Order Line Items	~	V	2	~		
Commission Calculations	~	2	V				Quotes	<u> </u>	V	2		~	
Commission Rates	~	2	2	~			Quote Items	~	Z	2	~	☑	
Commission Rules	~	2	2				Quote Templates	~	Z	2	Z	☑	
Department Dashboards	~	2	✓				Quote Template Items	2	~	✓	✓	~	
DNC Lists	2	2	✓	✓	✓	~	Receipts & Adjustments	2	~	✓	✓		
eCommPackages	2	2	✓				Reminder Calls	2	~	✓	✓		
eCommunications	~	2	2				Reminder Call Logins	~	~	2	~		
eLeada	~	2	2				Reminder Call Rules	~	~	2	~		
Email Content	~	2	2	~			Repeating Time Blocks	~	Z	2		Z	
Google Calendar Queue							Sales	~	Z	2		Z	
Helpera	~	2	2	~	~	Z	Sale Items	~	Z	2	~	Z	✓
Hours and Wages	~	2	2	~			Search Criteria	~	Z	2			
Inbound Texts	~				~		Sources	~	Z	2			
Interests	~	2	2	~	~	Z	Source Costs	~	Z	2			
Interest Selections	~	Z	V		~		Staff	~	Z	2		✓	
Lead Sources	~	2	~				Staff Account Transactions	<u>~</u>	Z	~			
Lead Source Summaries	<u>~</u>						atxeT bnuodnl	<u>~</u>				Z	
Loans	✓	Z	~				Surveys	<u>~</u>				Z	
Loan Programs	✓	Z	~				Survey Template	<u>~</u>				~	
Marketing Opportunities	<u>~</u>	Z	~				TestObjects	<u> </u>	~	~	~	~	✓
Materials	✓	✓	✓	✓			Time Blocks	✓	Z	✓	✓	<u> </u>	✓
Merge Candidates	<u> </u>	✓	✓	✓	_	_	Time Entries	<u> </u>	<u> </u>	✓	✓		
OAuth Services						_	Time Records	<u> </u>	✓	✓	✓		_
OAuth Tokens			_	_			Time Sheets	<u> </u>		✓	✓		_
Outbound Texts	<u>✓</u>	✓	<u>✓</u>	✓	_		Update Queues	<u> </u>					_
Pay Periods	<u> </u>	✓	✓			_	Wage Values			Z	✓		_
Pay Simple Accounts		_	_				WebRequests		_	Z			
Pay Simple Settings					✓		ZIp Codes						
Permits & Utilities		Z	∠				zProjects_new		_	Z	_		
Pricebooks				_			zProject Expenses_new		<u> </u>	2			
Pricebook Entry							zProject Milestones_new		<u> </u>	2			
Products		☑	✓	∠	✓		zProject Tasks_new	<u> </u>	<u> </u>	2			
Projects		2	<u> </u>				zProject Times_new		<u> </u>	☑			



Data Entry User Profile – Custom Tab Settings

Custom Tab Settings			
About	Tab Hidden 🗸	PaySimple Settings	Tab Hidden ✔
Alert Messages	Default On 🗸	Pricebooks	Tab Hidden ✔
Appointment Manager	Tab Hidden ✔	Production Grid	Tab Hidden ✔
Appointments	Default On 🗸	Products	Tab Hidden ✔
Call Queue	Tab Hidden ✔	Project Activities	Tab Hidden ✔
Campaign Members	Tab Hidden ✔	Project Costs	Tab Hidden ✔
Campaigns	Tab Hidden ✔	Project Incentives	Default On 🗸
Commission Calculations	Tab Hidden ✔	Projects	Tab Hidden ✔
Commission Rules	Tab Hidden ✔	Project Templates	Tab Hidden ✔
Commissions	Tab Hidden ✔	Prospects	Default On 🗸
Department Dashboards	Tab Hidden ✔	Prospect Searches	Tab Hidden ✔
DNC Lists	Tab Hidden ✔	Purchase Order Line Items	Tab Hidden 🗸
eCommPackages	Tab Hidden ✔	Purchase Orders	Tab Hidden ✔
eCommunications	Tab Hidden ✔	Quote Items	Tab Hidden ✔
eLeads	Tab Hidden ✔	Quotes	Tab Hidden ✔
Email Content	Default On 🗸	Quote Templates	Tab Hidden 🗸
First Time Setup	Tab Hidden ✔	Receipts & Adjustments	Tab Hidden 🗸
Hours and Wages	Tab Hidden ✔	Reminder Call Logins	Default On 🗸
Import Template	Tab Hidden ✔	Sale Items	Default On 🗸
improveit! 360	Tab Hidden ✔	Sales	Default Off 🗸
Inbound Texts	Default On 🗸	Settings	Default Off 🗸
Inbound Texts	Tab Hidden ✔	Sources	Default Off 🗸
Interest Selections	Tab Hidden ✔	Staff	Default Off 🗸
Lead Entry	Tab Hidden ✔	Staff Calendar	Default On 🗸
Lead Sources	Default Off 🗸	Surveys	Tab Hidden 🗸
Loan Programs	Tab Hidden ✔	Survey Template	Tab Hidden 🗸
Loans	Tab Hidden ✔	Time Block Manager	Tab Hidden 🗸
Marketing Opportunities	Default Off 🗸	Time Sheets	Tab Hidden 🗸
Materials	Default On 🗸	WebRequests	Default On 🗸
Merge Prospects	Default Off 🕶	Zip Codes	Default On 🗸
My Schedule	Tab Hidden ✔	zProject Expenses_new	Tab Hidden 🗸
OAuth Services	Default On 🗸	zProject Milestones_new	Tab Hidden 🗸
Open Items	Tab Hidden 🗸	zProjects_new	Tab Hidden 🗸
Outbound Texts	Default On 🗸	zProject Tasks_new	Tab Hidden ✔
Pay Periods	Tab Hidden 🗸	zProject Times_new	Tab Hidden 🗸



Data Entry User Profile – Custom Object Permissions

	Basic Acces	18			Data Admini	etration		Basic Access				Data Adminis	stration
	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All i	Modify All
Alert Messages	✓						Project Activities	✓	✓	✓	✓	✓	✓
Appointments	~	~	~		✓		Project Costs	✓	~	Z	✓		
Appointment Summaries	✓	~	~				Project Incentives						
Batch Jobs	✓	~	~				Project Templates	~	~	~			
Campaigns	✓	~	~		✓		Project Template Activities	~	~	~	✓		
Campaign Members	✓	~	✓		~		Prospects	✓	~	~		✓	
Campaign Member Action	✓	✓	✓		~		Inbound Texts	✓				✓	
CommCalcs	✓	~	✓				Prospect Searches	✓	~	~			
Commissions	✓	✓	✓				Purchase Orders	✓	~	~	✓		
Commission Adjustments	✓	✓	✓				Purchase Order Line Items	✓	~	~	✓		
Commission Calculations	~	~	~				Quotes	✓	~	~		✓	
Commission Rates	~	2	2	Z			Quote Items	~	2	2	~	✓	
Commission Rules	~	2	2				Quote Templates	~	2	2	✓	✓	
Department Dashboards	✓	~	~		0		Quote Template Items	✓	~	V	~	~	0
DNC Lists	✓	✓	~	~	✓	<u> </u>	Receipts & Adjustments	✓	~	~	~		
eCommPackages	<u> </u>	~	✓				Reminder Calls	✓	~	~	~		
eCommunications	✓	✓	~				Reminder Call Logins	✓	~	Z	✓		
eLeads	<u> </u>	<u> </u>	✓	_			Reminder Call Rules	<u> </u>	~	Z			_
Email Content		<u> </u>		✓			Repeating Time Blocks			Z	_	▽	
Google Calendar Queue							Sales	<u> </u>	<u> </u>				
Helpers		✓	∠	✓			Sale Items		<u> </u>				☑
Hours and Wages		<u> </u>	<u> </u>		_		Search Criteria		Z		_		_
Inbound Texts			_	0			Sources	Z	2	☑			
Interests		✓	✓	☑	<u> </u>		Source Costs	Z	2	☑			
Interest Selections		2	2		<u> </u>		Starr		2	2		■ ■	
Lead Sources	2	Z	2				Staff Account Transactions	2	2	✓			
Lead Source Summaries							Inbound Texts					☑	
Loans		✓	✓				Surveys	Z				2	
Loan Programs		2	2				Survey Template	Z				2	
Marketing Opportunities		2	2				TestObjects		✓	✓	<u> </u>	2	<u> </u>
Materials	<u> </u>	✓	✓	□ ☑			Time Blocks	<u> </u>	✓	✓	✓	☑ ☑	∠
Merge Candidates	<u> </u>	∠	✓	☑			Time Entries	<u> </u>	✓	✓	✓		
OAuth Services							Time Records	<u> </u>	✓	✓	✓		
OAuth Tokens							Time Sheets	<u> </u>	2	2	✓		
Outbound Texts							Update Queues						0
Pay Periods	<u> </u>	<	<u> </u>	☑	0		Wage Values	Z	Z			0	
Pay Simple Accounts		2	<u>~</u>		0		WebRequests	Z	2	■	✓	0	
Pay Simple Settings							Zip Codes		<u> </u>	<	✓		
Permits & Utilities					☑		zProjects_new		2	■	2		
Pricebooks	<u> </u>	2	✓	☑			zProject Expenses_new		<u> </u>	☑			
Pricebook Entry							zProject Milestones_new	✓	✓	✓			
Products								<u> </u>	✓	✓			
	✓	✓	✓	✓	✓		zProject Tasks_new	✓	✓	✓			
Projects	✓	~	~				zProject Times_new	✓	~	~			



Finance User Profile – Custom Tab Settings

Custom Tab Sottings			
Custom Tab Settings About	Tab Hidden ✔	PaySimple Settings	Tab Hidden ✔
Alert Messages	Default On 🗸	Pricebooks	Tab Hidden ✔
Appointment Manager	Tab Hidden ✔	Production Grid	Tab Hidden ✔
Appointments	Default Off ➤	Products	Default Off ➤
Call Queue	Tab Hidden ✔	Project Activities	Default Off ➤
Campaign Members	Tab Hidden ✔	Project Costs	Default On 🗸
Campaigns	Tab Hidden ✔	Project Incentives	Default On 🗸
Commission Calculations	Tab Hidden ✔	Projects	Default On 🗸
Commission Rules	Default Off 🗸	Project Templates	Default Off 🗸
Commissions	Default Off 🗸	Prospects	Default On 🗸
Department Dashboards	Tab Hidden ✔	Prospect Searches	Tab Hidden ✔
DNC Lists	Tab Hidden ✔	Purchase Order Line Items	Tab Hidden ✔
eCommPackages	Tab Hidden ✔	Purchase Orders	Default On 🗸
eCommunications	Tab Hidden ✔	Quote Items	Tab Hidden ✔
eLeads	Tab Hidden ✔	Quotes	Tab Hidden ✔
Email Content	Default On 🗸	Quote Templates	Tab Hidden ✔
First Time Setup	Tab Hidden 🗸	Receipts & Adjustments	Default On 🗸
Hours and Wages	Default Off 🗸	Reminder Call Logins	Default On 🗸
Import Template	Tab Hidden 🗸	Sale Items	Default On 🗸
improveit! 360	Tab Hidden 🗸	Sales	Default On 🗸
Inbound Texts	Default On 🗸	Settings	Default Off 🗸
Inbound Texts	Tab Hidden ✔	Sources	Tab Hidden ✔
Interest Selections	Tab Hidden 🗸	Staff	Default Off 🗸
Lead Entry	Tab Hidden 🗸	Staff Calendar	Default Off 🗸
Lead Sources	Tab Hidden ✔	Surveys	Tab Hidden ✔
Loan Programs	Default Off 🗸	Survey Template	Tab Hidden ✔
Loans	Default Off 🕶	Time Block Manager	Tab Hidden ✔
Marketing Opportunities	Tab Hidden ✔	Time Sheets	Tab Hidden ✔
Materials	Default On 🗸	WebRequests	Default On 🗸
Merge Prospects	Tab Hidden ✔	Zip Codes	Default On 🗸
My Schedule	Tab Hidden ✔	zProject Expenses_new	Tab Hidden ✔
OAuth Services	Default On 🗸	zProject Milestones_new	Tab Hidden ✔
Open Items	Tab Hidden ✔	zProjects_new	Tab Hidden ✔
Outbound Texts	Default On 🗸	zProject Tasks_new	Tab Hidden ✔
Pay Periods	Tab Hidden ✔	zProject Times_new	Tab Hidden ✔



Finance User Profile – Custom Object Permissions

	Basic Acce	88			Data Adminis	stration		Basic Acces	18			Data Admini	stration
	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All	ModIfy All
Alert Messages	~						Project Activities	~	Z	2			
Appointments	~	✓	~				Project Costs	~	~	2	✓	<u>~</u>	✓
Appointment Summaries	~	~	2				Project Incentives						
Batch Jobs	✓	✓	✓				Project Templates	✓	~	~			
Campaigns	~	~	~		✓		Project Template Activities	~	~	2			
Campaign Members	✓	✓	~		✓		Prospects	✓	~	~		<u>~</u>	
Campaign Member Action	✓	✓	~		✓		Inbound Texts	✓				<u>~</u>	
CommCalcs							Prospect Searches	~	2	2			
Commissions	✓	✓	✓	✓	✓	✓	Purchase Orders	✓	~	~	✓		
Commission Adjustments	~	✓	~	✓	✓	✓	Purchase Order Line items	~	~	~	✓		
Commission Calculations	~	~	2	✓	✓	~	Quotes	~	2	2	✓		
Commission Rates	~	~	2	~			Quote Items	~	Z	2	~		
Commission Rules	~	✓	~	✓	✓	~	Quote Templates	~	✓	~	✓		
Department Dashboards	~	~	~				Quote Template Items	~	Z	~	~		
DNC Lists	✓	✓	✓	✓	✓	✓	Receipts & Adjustments	✓	~	✓	~	✓	✓
eCommPackages	✓	✓	✓				Reminder Calls	✓	V	~	~		
eCommunications	✓	✓	✓				Reminder Call Logina	✓	Z	✓	~		
eLeads	~	~	~				Reminder Call Rules	~	Z	2	~		
Emall Content	~	✓	~	~			Repeating Time Blocks	✓	~	~		<u>~</u>	
Google Calendar Queue							Sales	✓	V	~		V	
Helpera	2	~	2	~	~	✓	Sale Items	~	2	2	~	~	~
Hours and Wages	2	2	2	~	✓		Search Criteria	2	2	2			
Inbound Texts	2				~		Sources	2	2	2		~	
Interests	2	2	2	Z	~	2	Source Costs	~	✓	2	✓	✓	~
Interest Selections	Z	2	Z		Z		Starr	~	✓	Z		✓	
Lead Sources	~	~	~				Staff Account Transactions	✓	Z	~	Z	✓	~
Lead Source Summaries	✓						Inbound Texts	✓				~	
Loans	<u> </u>	✓	<u> </u>	✓	✓	✓	Surveys	<u> </u>				✓	
Loan Programs	~	✓	~	~	~	~	Survey Template	✓	0			✓	
Marketing Opportunities	✓	✓	✓				TestObjects	V	V	~	~	<u> </u>	✓
Materials	✓	✓	✓	✓			Time Blocks	∠	✓	<u> </u>		✓	
Merge Candidates	<u> </u>	✓	✓				Time Entries	✓	✓	✓	<u> </u>	_	
OAuth Services							Time Records	✓	✓	✓	✓		_
OAuth Tokens				_			Time Sheets	<u> </u>	Z	✓	<u> </u>	✓	<u> </u>
Outbound Texts	<u> </u>	✓	✓	✓			Update Queues	✓	✓			_	_
Pay Periods			_		✓		Wage Values	<u> </u>	■	✓	<u> </u>		✓
Pay Simple Accounts					_		WebRequests		<u> </u>	<u> </u>		_	_
Pay Simple Settings					✓		ZIp Codes	<u> </u>	<u> </u>	■	<u> </u>		
Permits & Utilities		✓	✓				zProjects_new		2	☑			
Pricebooks							zProject Expenses_new	2	2	2		<u> </u>	
Pricebook Entry	Z						zProject Milestones_new		2	☑		<u> </u>	
Products		▽	✓				zProject Tasks_new		2	2		<u> </u>	
Projects	Z	∠	2		✓		zProject Times_new		2	2		□	0



Sales & Marketing User Profile – Custom Tab Settings

About Tab Hidden V Alet Messages Default On V Appointment Manager Tab Hidden V Appointment Manager Tab Hidden V Appointment Manager Tab Hidden V Appointment Default On V Appointment Default On V Appointment Default On V Campaign Members Tab Hidden V Campaign Members Tab Hidden V Campaign Members Tab Hidden V Campaign Settings Tab Hidden V Campaign Members Tab Hidden V Commission Calculations Tab Hidden V Commission Calculations Tab Hidden V Commission Rules Tab Hidden V Commission Rules Tab Hidden V Commissions Tab Hidden V Prospect Searches Tab Hidden V Department Dashboards Tab Hidden V Department Dashboards Tab Hidden V Decommencations Tab Hid	Custom Tab Settings			
Appointment Manager Appointments Default On V Appointments Default On V Call Queue Default On V Campaign Members Tab Hidden V Project Activities Tab Hidden V Project Activities Tab Hidden V Project Costs Tab Hidden V Project Costs Tab Hidden V Project Incentives Default On V Campaigns Tab Hidden V Project Incentives Default On V Commission Calculations Tab Hidden V Tommission Rules Tab Hidden V Tommissions Tab Hidden V Tommissions Tab Hidden V Prospect Templates Tab Hidden V Prospect Searches Tab Hidden V Prospect Searches Tab Hidden V Prospect Searches Tab Hidden V Purchase Order Line Items Tab Hidden V Purchase Order Line Items Tab Hidden V Tab	_	Tab Hidden ✔	PaySimple Settings	Tab Hidden ✔
Appointments Default On V Products Tab Hidden V Project Activities Tab Hidden V Project Activities Tab Hidden V Project Costs Tab Hidden V Project Incentives Default On V Project Incentives Intentive Incentives Incentive Incentives Incentives Incentives Incentives Incentives Incentives Incentives Incentives Incentive Incentives Incentives Incentives Incentive Incentives Individen V Incentive Inc	Alert Messages	Default On 🗸	Pricebooks	Tab Hidden ✓
Call Queue Default On V Campaign Members Tab Hidden V Campaign Members Tab Hidden V Campaigns Tab Hidden V Campaigns Tab Hidden V Commission Calculations Tab Hidden V Commission Calculations Tab Hidden V Commission Rules Tab Hidden V Commissions Tab Hidden V Commissions Tab Hidden V Project Templates Tab Hidden V Prospects Default On V Prospects Default On V Prospect Searches Tab Hidden V Prospect Searches Tab Hidden V Prospect Searches Tab Hidden V Purchase Order Line Items Tab Hidden V Purchase Order Line Items Tab Hidden V Purchase Orders Tab Hidden V Purchase Orders Tab Hidden V Quote Items Tab Hidden V Purchase Orders Tab Hidden V Purchase Order Line Items Tab Hidden V Purchase Order Line Items Tab Hidden V Purchase Orders Tab Hidden V Quote Items Tab Hidden V Receipts & Adjustments Tab Hidden V Receipts & Adjustments Tab Hidden V Reminder Call Logins Default On V Import Template Tab Hidden V Inbound Texts Default On V Interest Selections Tab Hidden V Interest Selections Tab Hidden V Lead Sources Default Off V Surveys Tab Hidden V Surveys Tab Hidden V Surveys Tab Hidden V Surveys Tab Hidden V Tab Hidden V Surveys Tab Hidden V Surveys Tab Hidden V Surveys Tab Hidden V	Appointment Manager	Tab Hidden ✔	Production Grid	Tab Hidden ✔
Campaign Members Tab Hidden V Campaigns Tab Hidden V Commission Calculations Tab Hidden V Commission Rules Tab Hidden V Commission Rules Tab Hidden V Commission Rules Tab Hidden V Commissions Tab Hidden V Commissions Tab Hidden V Project Templates Tab Hidden V Prospect Tab Hidden V Prospect Searches Tab Hidden V Prospect Searches Tab Hidden V Purchase Order Line Items Tab Hidden V Purchase Order Tab Hidden V Project Tab	Appointments	Default On 🗸	Products	Tab Hidden ✔
Campaigns Tab Hidden V Commission Calculations Tab Hidden V Commission Rules Tab Hidden V Commission Rules Tab Hidden V Commissions Tab Hidden V Commissions Tab Hidden V Department Dashboards Tab Hidden V DNC Lists Tab Hidden V Ecommpackages Tab Hidden V Ecommpackages Tab Hidden V Ecommpackages Tab Hidden V Ecommunications Tab Hidden V Email Content Default On V Email Content Default On V First Time Setup Tab Hidden V Hours and Wages Tab Hidden V Import Template Tab Hidden V Import Template Tab Hidden V Inbound Texts Default On V Interest Selections Tab Hidden V Interest Selections Tab Hidden V Interest Selections Tab Hidden V Inab Hidden V Interest Selections Tab Hidden V Inab Hidden V Interest Selections Tab Hidden V Inab Hidden V Interest Selections Tab Hidden V Interest Selections Tab Hidden V Interest Selections Tab Hidden V Inab Hidden V Interest Selections Tab Hidden V Inab Hidden V Interest Selections Tab Hidden V Inab Hidden V Inab Hidden V Interest Selections Tab Hidden V Interest Selections Tab Hidden V Inab Hid	Call Queue	Default On 🗸	Project Activities	Tab Hidden ✔
Commission Calculations Tab Hidden Commission Rules Tab Hidden Commissions Tab Hidden Commissions Tab Hidden Tab Hidden Department Dashboards Tab Hidden DNC Lists Tab Hidden DNC Lists Tab Hidden Ecommpackages Tab Hidden Purchase Order Line Items Tab Hidden Purchase Order Line Items Tab Hidden Quote Items Tab Hidden Quote Items Tab Hidden Email Content Default On Email Content Default On First Time Setup Tab Hidden Hours and Wages Tab Hidden Import Template Tab Hidden Import Template Tab Hidden Import Template Tab Hidden Import Template Tab Hidden Inbound Texts Default On Inbound Texts Tab Hidden Interest Selections Tab Hidden Lead Sources Default Off Sales Tab Hidden Sales Tab Hidden Sales Tab Hidden Sales Tab Hidden Sources Default Off Sales Tab Hidden Sources Tab Hidden Sales Tab Hidden Sources Tab Hidden Sales Tab Hidden Sources Tab Hidden Sources Tab Hidden Sales Tab Hidden Sources Tab Hidden Sales Tab Hidden Sources Tab Hidden	Campaign Members	Tab Hidden ✔	Project Costs	Tab Hidden ✔
Commission Rules Tab Hidden V Commissions Tab Hidden V Department Dashboards Tab Hidden V DNC Lists Tab Hidden V ECommPackages Tab Hidden V ECommunications Tab Hidden V Email Content Default On V Default On V Email Content Default On V First Time Setup Hours and Wages Tab Hidden V Import Template Tab Hidden V Import Template Tab Hidden V Inbound Texts Tab Hidden V Lead Entry Tab Hidden V Lead Sources Default Off V Lead Sources Default Off V Surveys Tab Hidden V Tab Hidden V Surveys Tab Hidden V Surveys Tab Hidden V Tab Hidden V Surveys Tab Hidden V	Campaigns	Tab Hidden ✔	Project Incentives	Default On 🗸
Tab Hidden V Department Dashboards Tab Hidden V DNC Lists Tab Hidden V Prospect Searches Tab Hidden V Prospect Searches Tab Hidden V Prospect Searches Tab Hidden V Purchase Order Line Items Tab Hidden V Purchase Order Line Items Tab Hidden V Purchase Orders Tab Hidden V Purchase Orders Tab Hidden V Quote Items Tab Hidden V Email Content Default On V Email Content Default On V First Time Setup Tab Hidden V Receipts & Adjustments Tab Hidden V Receipts & Adjustments Tab Hidden V Reminder Call Logins Default On V Import Template Tab Hidden V Inbound Texts Default On V Interest Selections Tab Hidden V Lead Entry Tab Hidden V Lead Sources Default Off V Surveys Tab Hidden V Surveys Tab Hidden V Surveys Tab Hidden V Survey Template Tab Hidden V Time Block Manager Tab Hidden V	Commission Calculations	Tab Hidden ✔	Projects	Tab Hidden ✔
Department Dashboards Tab Hidden V DNC Lists Tab Hidden V eCommPackages Tab Hidden V eCommunications Tab Hidden V eLeads Tab Hidden V Email Content Default On V Import Template Tab Hidden V Inbound Texts Tab Hidden V Interest Selections Tab Hidden V Lead Sources Default Off V Lead Sources Default Off V Interest Selections Tab Hidden V Loan Programs Tab Hidden V Purchase Order Line Items Tab Hidden V Purchase Order Line Items Tab Hidden V Purchase Order Line Items Tab Hidden V Quote Items Tab Hidden V Quote Templates Default Off V Receipts & Adjustments Tab Hidden V Reminder Call Logins Default On V Sales Items Default On V Settings Tab Hidden V Sources Default Off V Staff Calendar Default Off V Surveys Tab Hidden V Surveys Tab Hidden V Surveys Tab Hidden V Tab Hidden V Surveys Tab Hidden V Loan Programs Tab Hidden V	Commission Rules	Tab Hidden ✔	Project Templates	Tab Hidden ✔
DNC Lists Tab Hidden \times Purchase Order Line Items Tab Hidden \times Purchase Order Sab Hidden \times Order	Commissions	Tab Hidden ✔	Prospects	Default On 🗸
eCommPackages Tab Hidden V eCommunications Tab Hidden V eLeads Tab Hidden V Email Content Default On V First Time Setup Tab Hidden V Hours and Wages Tab Hidden V Import Template Tab Hidden V Import Template Tab Hidden V Inbound Texts Default On V Inbound Texts Tab Hidden V Interest Selections Tab Hidden V Lead Sources Default Off V Lead Sources Default Off V Loan Programs Tab Hidden V Tab Hidden V Tab Hidden V Survey Tab Hidden V Survey Tab Hidden V Time Block Manager Tab Hidden V Time Block Manager Tab Hidden V Time Block Manager Tab Hidden V	Department Dashboards	Tab Hidden ✔	Prospect Searches	Tab Hidden ✔
eCommunications Tab Hidden \(\) eLeads Tab Hidden \(\) Email Content Default On \(\) First Time Setup Hours and Wages Tab Hidden \(\) Import Template Tab Hidden \(\) Inbound Texts Default On \(\) Inbound Texts Default On \(\) Interest Selections Tab Hidden \(\) Interest Selections Tab Hidden \(\) Lead Entry Tab Hidden \(\) Lead Sources Default Off \(\) Surveys Tab Hidden \(\) Tab Hidden \(\) Lead Sources Default Off \(\) Surveys Tab Hidden \(\) Tab Hidden \(\) Loan Programs Tab Hidden \(\)	DNC Lists	Tab Hidden ✔	Purchase Order Line Items	Tab Hidden ✔
eLeads Tab Hidden Email Content Default On Email Content Default On First Time Setup Tab Hidden Hours and Wages Tab Hidden Import Template Tab Hidden Import Template Tab Hidden Import Template Tab Hidden Import Template Tab Hidden Inbound Texts Default On Inbound Texts Tab Hidden Interest Selections Tab Hidden Lead Entry Tab Hidden Lead Sources Default Off Lead Sources Default Off Lead Sources Default Off Surveys Tab Hidden Loans Tab Hidden Tab H	eCommPackages	Tab Hidden ✔	Purchase Orders	Tab Hidden ✔
Email Content Default On V First Time Setup Tab Hidden V Hours and Wages Tab Hidden V Import Template Import T	eCommunications	Tab Hidden ✔	Quote Items	Tab Hidden ✔
First Time Setup Tab Hidden \times Tab Hidden \times	eLeads	Tab Hidden ✔	Quotes	Default Off 🗸
Hours and Wages Tab Hidden V Import Template Tab Hidden V Inbound Texts Default On V Inbound Texts Tab Hidden V Interest Selections Tab Hidden V	Email Content	Default On 🗸	Quote Templates	Default Off 🗸
Import Template Tab Hidden ▼ improveit! 360 Tab Hidden ▼ Inbound Texts Default On ▼ Inbound Texts Tab Hidden ▼ Interest Selections Tab Hidden ▼ Lead Entry Tab Hidden ▼ Lead Sources Default Off ▼ Lead Sources Default Off ▼ Lead Sources Default Off ▼ Staff Calendar Default Off ▼ Surveys Tab Hidden ▼ Loan Programs Tab Hidden ▼ Loans Tab Hidden ▼ Time Block Manager Tab Hidden ▼	First Time Setup	Tab Hidden ✔	Receipts & Adjustments	Tab Hidden ✔
improveit! 360 Tab Hidden ▼ Inbound Texts Default On ▼ Inbound Texts Tab Hidden ▼ Interest Selections Tab Hidden ▼ Lead Entry Tab Hidden ▼ Lead Sources Default Off ▼ Lead Sources Default Off ▼ Staff Calendar Default Off ▼ Lead Sources Default Off ▼ Surveys Tab Hidden ▼ Loan Programs Tab Hidden ▼ Loans Tab Hidden ▼	Hours and Wages	Tab Hidden ✔	Reminder Call Logins	Default On 🗸
Inbound Texts Default On V Inbound Texts Tab Hidden V Interest Selections Tab Hidden V Lead Entry Tab Hidden V Lead Sources Default Off V Lead Sources Default Off V Lead Sources Tab Hidden V Loan Programs Tab Hidden V Loans Tab Hidden V Time Block Manager Tab Hidden V	Import Template	Tab Hidden ✔	Sale Items	Default On 🗸
Inbound Texts Tab Hidden ✓ Interest Selections Tab Hidden ✓ Lead Entry Tab Hidden ✓ Lead Sources Default Off ✓ Lead Sources Default Off ✓ Loan Programs Tab Hidden ✓ Loans Tab Hidden ✓	improveit! 360	Tab Hidden ✔	Sales	Tab Hidden ✔
Interest Selections Tab Hidden Lead Entry Lead Sources Default Off Lead Sources Default Off Surveys Tab Hidden Surveys Tab Hidden Loan Programs Tab Hidden Loans Tab Hidden Tab Hi	Inbound Texts	Default On 🗸	Settings	Tab Hidden ✔
Lead Entry Tab Hidden Lead Sources Default Off Loan Programs Tab Hidden Loans Tab Hidden Loans Tab Hidden Tab Hi	Inbound Texts	Tab Hidden ✔	Sources	Default Off 🗸
Lead Sources Default Off ✓ Loan Programs Tab Hidden ✓ Loans Tab Hidden ✓	Interest Selections	Tab Hidden ✔	Staff	Default Off 🗸
Loan Programs Tab Hidden ✓ Loans Tab Hidden ✓	Lead Entry	Tab Hidden ✔	Staff Calendar	Default On 🗸
Loans Tab Hidden V Time Block Manager Tab Hidden V	Lead Sources	Default Off 🗸	Surveys	Tab Hidden ✔
Tub Hidden ?	Loan Programs	Tab Hidden ✔	Survey Template	Tab Hidden ✔
Marketing Opportunities	Loans	Tab Hidden ✔	Time Block Manager	Tab Hidden ✔
	Marketing Opportunities	Default Off 🗸	Time Sheets	Tab Hidden ✔
Materials Default On ✓ WebRequests Default On ✓	Materials	Default On 🗸	WebRequests	Default On 🗸
Merge Prospects Tab Hidden ✓ Zip Codes Default On ✓	Merge Prospects	Tab Hidden ✔	Zip Codes	Default On 🗸
My Schedule Tab Hidden ✓ ZProject Expenses_new Tab Hidden ✓	My Schedule	Tab Hidden ✔	zProject Expenses_new	Tab Hidden ✔
OAuth Services Default On V	OAuth Services	Default On 🗸	zProject Milestones_new	Tab Hidden ✔
Open Items	Open Items	Tab Hidden ✔	zProjects_new	Tab Hidden ✔
Outbound Texts Default On V	Outbound Texts	Default On 🗸	zProject Tasks_new	Tab Hidden ✔
Pay Periods Tab Hidden ▼ ZProject Times_new Tab Hidden ▼	Pay Periods	Tab Hidden ➤	zProject Times_new	Tab Hidden ✔



Sales & Marketing User Profile – Custom Object Permissions

	Basic Acces Read	Create	Edit	Delete	View All	Modify All		Basic Acces Read	Create	Edit	Delete	View All	etration Modify All
Alert Messages	~						Project Activities	~	Z	2	2	~	<u> </u>
Appointments	<u> </u>	<u>~</u>	✓		✓		Project Costs	✓	<u>~</u>	~	~		
Appointment Summaries	<u>~</u>	✓	✓				Project Incentives						
Batch Jobs	<u>~</u>	✓	✓				Project Templates	✓	✓	~			
Campaigne	~	~	✓		✓		Project Template Activities	~	~	~	~		
Campaign Members	~	~	~		✓		Prospects	~	Z	~		~	
Campaign Member Action	Z	Z	2		✓		Inbound Texts	~				~	
CommCalcs	~	Z	2				Prospect Searches	2	Z	2			
Commissions	~	~	2				Purchase Orders	~	Z	2	~		
Commission Adjustments	~	~	~				Purchase Order Line Items	~	~	~	~		
Commission Calculations	Z	~	✓				Quotes	~	~	~		✓	
Commission Rates	<u>~</u>	✓	✓	✓			Quote Items	✓	✓	~	✓	✓	
Commission Rules	<u>~</u>	✓	✓				Quote Templates	✓	✓	~	✓	✓	
Department Dashboards	<u> </u>	<u>~</u>	✓				Quote Template Items	✓	✓	~	✓	✓	
DNC Lists	~	Z	2	~	~	<u> </u>	Receipts & Adjustments	~	2	2	2		
eCommPackages	Z	Z	2				Reminder Calls	2	Z	2	Z		
eCommunications	Z	Z	2				Reminder Call Logins	2	Z	2	Z		
eLeads	<u> </u>	~	✓				Reminder Call Rules	~	~	~	~		
Email Content	Z	Z	~	Z			Repeating Time Blocks	~	Z			~	
Google Calendar Queue							Sales	✓	✓			✓	
Helpera	<u> </u>	✓	~	~	✓	✓	Sale Items	✓	Z	~	~	✓	✓
Hours and Wages		<u> </u>	<u> </u>	<u> </u>			Search Criteria	<u> </u>	<u> </u>	<u> </u>			
Inbound Texts		_	_	_	✓		Sources	<u> </u>	<u> </u>	✓			_
Interests		<u>✓</u>	▽	<u>✓</u>		✓	Source Costs		<u> </u>	<u> </u>			_
Interest Selections		<u> </u>	<u> </u>	_			Starr	<u> </u>	<u> </u>	✓			_
Lead Sources		✓	✓		_		Staff Account Transactions		<u> </u>	✓		_	
Lead Source Summaries		_	_				Inbound Texts		_	_		▽	
Loans		☑	✓				Surveys	<u> </u>				<u> </u>	
Loan Programs		<u> </u>	<u> </u>				Survey Template					<u> </u>	
Marketing Opportunities		<u> </u>	<u> </u>				TestObjects		<u> </u>	<u> </u>	▽	<u> </u>	
Materials		<u> </u>	<u> </u>	<u> </u>			Time Blocks		<u> </u>	<u> </u>	2	<u> </u>	<u> </u>
Merge Candidates		<u> </u>	<u> </u>				Time Entries		<u> </u>	<u> </u>	<u> </u>	_	
OAuth Services		_	_	_			Time Records		<u> </u>	<u> </u>			
OAuth Tokens							Time Sheets		<u> </u>	2	<u> </u>		
Outbound Texts		<u>✓</u>	✓	✓			Update Queues	2	<u> </u>				
Pay Periods		<u> </u>	2				Wage Values		<u> </u>	✓	▽		
Pay Simple Accounts							WebRequests		<u> </u>	2	□		0
PaySimple Settings					▽		ZIp Codes		☑	2	2		
Permits & Utilities		✓	✓	✓			zProjects_new		<u> </u>	2			
Pricebooks							zProject Expenses_new		☑	✓			
Pricebook Entry							zProject Milestones_new		✓	✓			
Products		✓	✓	✓	✓		zProject Taaka_new		☑	✓			
Projects		✓	✓				zProject Times_new		☑	✓		0	



Production & Installation User Profile – Custom Tab Settings

Custom Tab Cattings			
Custom Tab Settings About	Tab Hidden ✔	PaySimple Settings	Tab Hidden ✔
Alert Messages	Default On 🗸	Pricebooks	Tab Hidden 🗸
Appointment Manager	Default Off 🗸	Production Grid	Default On 🗸
Appointments	Default On 🗸	Products	Default Off 🗸
Call Queue	Default Off 🗸	Project Activities	Default Off 🗸
Campaign Members	Default On 🗸	Project Costs	Default Off 🗸
Campaigns	Default On 🗸	Project Incentives	Default On 🗸
Commission Calculations	Tab Hidden ✔	Projects	Default On 🗸
Commission Rules	Default Off 🗸	Project Templates	Default Off ▼
Commissions	Default Off 🗸	Prospects	Default On 🗸
Department Dashboards	Tab Hidden ✔	Prospect Searches	Tab Hidden ✔
DNC Lists	Default Off 🗸	Purchase Order Line Items	Tab Hidden ✔
eCommPackages	Tab Hidden ✔	Purchase Orders	Default Off 🗸
eCommunications	Tab Hidden ✔	Quote Items	Tab Hidden 🗸
eLeads	Tab Hidden ✔	Quotes	Tab Hidden 🗸
Email Content	Default On 🗸	Quote Templates	Tab Hidden ✔
First Time Setup	Tab Hidden ✔	Receipts & Adjustments	Tab Hidden ✔
Hours and Wages	Default Off 🗸	Reminder Call Logins	Default On 🗸
Import Template	Tab Hidden ✔	Sale Items	Default On 🗸
improveit! 360	Tab Hidden ✔	Sales	Default On 🗸
Inbound Texts	Default On 🗸	Settings	Tab Hidden ✔
Inbound Texts	Tab Hidden ✔	Sources	Tab Hidden ✔
Interest Selections	Tab Hidden ✔	Staff	Default Off 🗸
Lead Entry	Tab Hidden ✔	Staff Calendar	Default On 🗸
Lead Sources	Default Off 🗸	Surveys	Tab Hidden ✔
Loan Programs	Default Off 🗸	Survey Template	Tab Hidden ✔
Loans	Default Off 🗸	Time Block Manager	Tab Hidden ✔
Marketing Opportunities	Default Off 🕶	Time Sheets	Tab Hidden ✔
Materials	Default On 🕶	WebRequests	Default On 🗸
Merge Prospects	Default Off 🕶	Zip Codes	Default On 🗸
My Schedule	Tab Hidden 🗸	zProject Expenses_new	Tab Hidden ✔
OAuth Services	Default On 🗸	zProject Milestones_new	Tab Hidden ✔
Open Items	Default Off 🗸	zProjects_new	Tab Hidden ✔
Outbound Texts	Default On 🗸	zProject Tasks_new	Tab Hidden ✔
Pay Periods	Tab Hidden 🗸	zProject Times_new	Tab Hidden ✔



Production & Installation User Profile – Custom Object Permissions

	Basic Acces	18			Data Adminis	tration		Basic Acces				Data Admini	etration
	Read	Create	Edit	Delete	Vlew All	Modify All		Read	Create	Edit	Delete	View All i	ModIfy All
Alert Messages	2	0					Project Activities	✓	∠	2	<u> </u>	▽	∠
Appointments		<u> </u>	∠		☑		Project Costs					_	
Appointment Summaries			<u> </u>				Project Incentives		_	_	0		
Batch Jobs	Z	<u> </u>	Z				Project Templates		<u> </u>	∠			
Campaigns			<u> </u>		<u> </u>		Project Template Activities						
Campaign Members	Z	Z	Z		✓		Prospects		<u> </u>	<u> </u>			
Campaign Member Action	■		✓				Inbound Texts		_	_			
CommCalca	V	✓	Z				Prospect Searches	<u> </u>	<u> </u>	<u>~</u>			
Commissions	V	Z	~				Purchase Orders	<u> </u>			~		
Commission Adjustments	Z	<u> </u>	Z				Purchase Order Line Items		<u> </u>	<u> </u>	Z		
Commission Calculations	V	Z	Z				Quotes	V	<u> </u>	<u> </u>		✓	
Commission Rates	V	Z	~		_		Quote Items	<u> </u>	<u> </u>		~		
Commission Rules	V	✓	✓	_			Quote Templates				~		
Department Dashboards	<u> </u>	<u> </u>	☑				Quote Template Items	<u> </u>	<u> </u>	<u> </u>	<u> </u>	<u> </u>	
DNC Lists		<u> </u>	<u> </u>		☑		Receipts & Adjustments		<u> </u>	<u> </u>	<u> </u>		
eCommPackages				_	_		Reminder Calls		<u> </u>		<u> </u>		
eCommunications	Z	<u> </u>	<u> </u>				Reminder Call Logins		<u> </u>		Z		
eLeada	2	2	<u> </u>				Reminder Call Rules		<u> </u>				
Email Content		<u> </u>		<u> </u>			Repeating Time Blocks				0	<u>∨</u>	
Google Calendar Queue				_	0		Sales				0		
Helpera		<u> </u>	<u> </u>		☑	<u> </u>	Sale Items		<u> </u>				∠
Hours and Wages		<u> </u>			_		Search Criteria		<u> </u>		_		_
Inbound Texts				_	<u> </u>		Sources		<u> </u>				
Interests	Z						Source Costs		<u> </u>				
Interest Selections				_			Staff		<u> </u>			✓	
Lead Sources	Z				_		Staff Account Transactions					_	
Lead Source Summaries	<u> </u>				0		Inbound Texts		_	_	0	<u>∨</u>	
Loans		<u> </u>	<u> </u>				Surveys						
Loan Programs					0		Survey Template				0		
Marketing Opportunities	V	V	<u> </u>				TestObjects		<u> </u>	<u> </u>			∠
Materials	Z	Z	2				Time Blocks		<u> </u>			<u> </u>	<u> </u>
Merge Candidates		<u> </u>	<u> </u>				Time Entries		<u> </u>	<u> </u>	<u> </u>		
OAuth Services							Time Records		<u> </u>	<u> </u>	<u> </u>		
OAuth Tokens		0					Time Sheets		<u> </u>	2	■		
Outbound Texts							Update Queues		<u> </u>	_			
Pay Periods		2	2	_	0		Wage Values		<u> </u>	<u>✓</u>			
Pay Simple Accounts							WebRequests		2	2	Z		
PaySimple Settings		0			■		ZIp Codes	<u> </u>	2	2	■		
Permits & Utilities	2	■	☑	✓			zProjects_new		2	<u> </u>			
Pricebooks							zProject Expenses_new		Z	Z			
Pricebook Entry							zProject Milestones_new		□	2			
Products		2	☑	✓	■		zProject Tasks_new		□	2			
Projects	2	2	✓				zProject Times_new	2	✓	∠			



Mobile Only User Profile – Custom Object Permissions

(note: Mobile Only Users do not have a Tab view as they do not access the Desktop application at all.

	Basic Acces				Data Admini			Basic Acces				Data Admin	nistration
	Read	Create	Edit	Delete	View All	Modify All		Read	Create	Edit	Delete	View All i	Modify
Alert Messages	~						Project Activities	Z	~	✓			
Appointments	Z	Z	~		~		Project Costs	Z	~	2			
Appointment Summaries	~	~	~				Project Incentives						
Batch Jobs	~	~	<u>~</u>	✓	✓	✓	Project Templates	~	<u>~</u>	~			
Campaigne							Project Template Activities	✓	✓	~			
Campaign Members							Prospects	~	<u>~</u>	~		☑	
Campaign Member Action							Inbound Texts	Z				✓	
CommCalca							Prospect Searches	✓	✓				
Commissions							Purchase Orders						
Commission Adjustments							Purchase Order Line Items						
Commission Calculations							Quotes	✓	<u>~</u>				
Commission Rates	~	✓	✓	✓			Quote Items	✓	✓				
Commission Rules							Quote Templates	Z	✓				
Department Dashboards	Z	✓	✓				Quote Template Items	Z					
DNC Lists	Z						Receipts & Adjustments	~	✓	✓			
eCommPackages							Reminder Calls	✓	✓	~	✓		
eCommunications							Reminder Call Logine	~	~	~	✓		
eLeads	~	✓					Reminder Call Rules	~	✓	~	✓		
Email Content	Z	✓	~	✓			Repeating Time Blocks	Z	Z				
Google Calendar Queue							Sales	✓	✓	~			
Helpera	✓	✓	✓	✓	✓	✓	Sale Items	✓	✓	~			
Hours and Wages							Search Criteria						
Inbound Texts	~				✓		Sources	~	Z	~			
Interests	Z	✓	✓	~	✓		Source Costs	Z	✓	Z			
Interest Selections	✓	✓					Starr	✓	✓	~		✓	
Lead Sources	✓	✓					Staff Account Transactions						
Lead Source Summaries	~	✓					Inbound Texts	✓				☑	
Loans							Surveys	~				☑	
Loan Programs							Survey Template	✓				✓	
Marketing Opportunities	Z	✓	✓				TestObjects	Z	✓	Z	✓	✓	C
Materials	✓	✓	✓	✓			Time Blocks	✓	✓	Z			
Merge Candidates							Time Entries						
OAuth Services							Time Records	Z	~	✓	<u>~</u>		
OAuth Tokens							Time Sheets						
Outbound Texts	~	Z	~	✓			Update Queues	✓	~				
Pay Periods							Wage Values						
Pay Simple Accounts							WebRequests	✓	~	✓	✓		
Pay Simple Settings	~				~		ZIp Codes	Z	~	✓	<u>~</u>		
Permits & Utilities	2	~	✓	✓			zProjects_new						
Pricebooks							zProject Expenses_new						
Pricebook Entry							zProject Milestones_new						
Products	✓	✓	✓				zProject Tasks_new						
Projects	✓	✓	✓				zProject Times_new						