Below is a list of the basic permissions you need to be able to complete the lead to receipt module functions. Please note that these permissions are only for the lead to receipt module and not all permissions needed to complete daily tasks.

2.1. Leads:

Description:	Permission:	View:	Modify:
Create, edit and update your own sales leads.	Sales[1]	X	X
Submit your own sales lead for a site survey.	Sales	X	X
Create leads from customer profile.	Customer	X	
Assign and Re-assign Leads	Sales Lead Assigner[2]	X	X
Assign, re-assign and work on other sales leads.	Sales Supervisor[3]	X	X

1 – This will allow the sales agent to work on their own leads, but not assign leads or work on other
sales agent's leads.
2 – It is advised that a dedicated person should be chosen to equally assign new leads to sales agents.
Should the sales agent not have this permission, they will not be able to "steal" leads or work on other
sales agent's leads – just their own.
3- This permission will be used mainly for the sales manager. This permission will enable the manager
to assign and re-assign leads as well as edit the sales leads of all sales agents.

2.2. Surveys:

Description:	Permission:	View:	Modify:
Create, edit and update sales leads.	Sales	X	
	Operations	X	
	Job Cards	X	
Schedule events.	Sales	X	
	Operations	X	
	Job Cards	X	
	Helpdesk	X	X
Mark site survey as complete:	Sales	X	
	Operations	X	
	Job Cards	X	

2.3. Quotes:

Description:	Permission:	View:	Modify:
Create, edit and update sales leads.	Sales	X	
	Basic Accounting	X	X
Create Quote	Sales	X	
	Basic Accounting	X	X
Mail Quote	Sales	X	
	Basic Accounting	X	X
Manually accept or reject quotes:	Sales	X	
	Basic Accounting	X	X

2.4. Customers:

Description:	Permission:	View:	Modify:
Create, edit and update sales leads.	Sales	X	
	Customer	X	X
Edit billing details:	Sales	X	
	Customer	X	X
Recurring billing complete:	Sales	X	
	Customers	X	X
Update customer details (changes that have been submitted through the customer online portal).	Sales	X	
	Customers	X	X

2.5. Job Cards:

Description:	Permission:	View:	Modify:
Create, edit and update sales leads.	Sales	X	
	Operations	X	X
	Job Cards	X	X
Schedule job	Sales	X	
	Customer	X	
	Operations	X	X
	Job Cards	X	X
	Helpdesk	X	X

Add and complete checklists on lead`s:	Sales	X	
	Workflow	X	
	Operations	X	X
	Job Cards	X	X
Create job card from ticket.	Customers	X	
	Helpdesk	X	X

2.6. Invoicing:

Description:	**Permission:**	**View:**	**Modify:**
Create, edit and update sales leads.	Sales	X	
	Basic Accounting	X	X
Generate invoice from job card:	Sales	X	
	Workflow	X	
	Customers	X	
	Operations	X	X
	Helpdesk	X	
	Job cards	X	
	Basic Accounting	X	X
Push invoice to Sage One:	Customers	X	
	Billing	X	X
	Basic Accounting	X	X

2.7. Quality Control:

Description:	Permission:	View:	Modify:
Edit and complete checklist:	Sales	X	
	Operations	X	X
	Workflow	X	
	Customers	X	
	Helpdesk	X	
	Basic Accounting	X	X

2.8. Ratings:

Description:	Permission:	View:	Modify:
Acknowledge Rating:	Sales	X	
	Workflow	X	
	Customers	X	
	Operations:	X	
Create helpdesk ticket for rating:	Sales	X	
	Workflow	X	
	Customers	X	
	Helpdesk	X	X