

### Limiting Opportunities by User:

1. Click Admin,
2. Click Role Management,
3. Click Create Role in Shortcuts,



4. Enter Role Name. For documentation purposes we entered Holly Test.
5. Enter Description for Role,
6. Double click All in the Module for view, list, edit, delete, import and export and select Owner. For this example, we limited all functions in Opportunities to Owner
7. Click Save

A screenshot of a role creation form. At the top left are 'Save' and 'Cancel' buttons. At the top right is a note: '\* Indicates required field'. The form has two main fields: 'Name\*' with the value 'Holly Test' and 'Description' with the value 'Testing for Cipha'. An arrow points to the 'Save' button, and another arrow points to the 'Description' text area.

Double click on a cell to change value.

	Access	View	List	Edit	Delete	Import	Export
Accounts	Enabled	All	All	All	All	All	All
Bug Tracker	Enabled	All	All	All	All	All	All
Calls	Enabled	All	All	All	All	All	All
Campaigns	Enabled	All	All	All	All	All	All
Support Tickets	Enabled	All	All	All	All	All	All
Contacts	Enabled	All	All	All	All	All	All
Contracts	Enabled	All	All	All	All	All	All
Dashboard	Enabled	All	All	All	All	All	All
Documents	Enabled	All	All	All	All	All	All
Emails	Enabled	All	All	All	All	All	All
Email Templates	Enabled	All	All	All	All	All	All
Employees	Enabled	All	All	All	All	All	All
RSS	Enabled	All	All	All	All	All	All
My Portal	Enabled	All	All	All	All	All	All
iLeadMachine	Enabled	All	All	All	All	All	All
Leads	Enabled	All	All	All	All	All	All
Meetings	Enabled	All	All	All	All	All	All
Notes	Enabled	All	All	All	All	All	All
Opportunities	Enabled	Owner	Owner	Owner	Owner	None	Owner
Products	Enabled	All	All	All	All	All	All
Projects	Enabled	All	All	All	All	All	All
ProjectTasks	Enabled	All	All	All	All	All	All
Target Lists	Enabled	All	All	All	All	All	All
Targets	Enabled	All	All	All	All	All	All
Quotes	Enabled	All	All	All	All	All	All
Reports	Enabled	All	All	All	All	All	All
Tasks	Enabled	All	All	All	All	All	All

## Adding Users to New Role:

1. Click Role Management in Administration.
2. Double click on new role created (Holly Test).
3. Scroll to bottom of screen.
4. Click Add Users.
5. Select Users from list of users.
6. Click Select Checked Users.
7. Click Done.

**Users**

Select Checked Users Done

Previous (1 - 3 of 3) Next

Name	User Name
<input type="checkbox"/> Administrator	admin
<input checked="" type="checkbox"/> Casey Somers	csomers
<input checked="" type="checkbox"/> Tanya Doidge	tdoidge

## Create New Opportunity:

1. Click Opportunity Tab
2. Click Create Opportunity in Shortcuts
3. Enter an Opportunity Name (required field). For documentation purposes, we entered New Plants.
4. Click Change and select an Account Name (required field).
5. Select Type from Drop Down
6. Select Lead Source from Drop Down
7. Select Currency from Drop Down
8. Enter Amount (required field)
9. Select Expected Close Date (required field)
10. Select Sales Stage from Drop down if do not want the default sales stage
11. Click Change and select user to Assign to (this is how the system will know to only show this user this opportunity). For documentation purposes we chose csomers.
12. Enter Description (optional)
13. Click Save

**Shortcuts**

- Create Opportunity
- Opportunities
- Import

**Opportunities: New Plants** Help Wiki

Save Cancel \* Indicates required field

Opportunity Name:\* New Plants Currency: U.S. Dollar: \$

Account Name:\* A. A. Casey Co. Change Amount:\* 5,000.00

Type: Plants Expected Close Date:\* 05/11/2007 MM/DD/YYYY

Lead Source: Call-In Next Step: Sent Proposal

Assigned to: csomers Change Probability (%): 10

Description: Documentation Purposes Sales Stage: Initial Contact

**Click Change and Assign to**

14. Create another opportunity following above steps. For our 2<sup>nd</sup> opportunity we named the opportunity Glasses and assigned it to tdoidge.

The screenshot shows a CRM form for creating a new opportunity. At the top left, there are 'Save' and 'Cancel' buttons. An arrow points to the 'Save' button. The form contains the following fields and values:

- Opportunity Name: New Glasses
- Account Name: A.A. Casey Co. (with a 'Change' button)
- Type: Glasses (dropdown menu)
- Lead Source: Self Generated (dropdown menu)
- Assigned to: tdoidge (with a 'Change' button)
- Description: Documentation Purposes (text area)
- Currency: U.S. Dollar: \$ (dropdown menu)
- Amount: 3,000.00
- Expected Close Date: 05/11/2007 (calendar icon, format MM/DD/YYYY)
- Next Step: Sent Proposal (dropdown menu)
- Probability (%): 10
- Sales Stage: Initial Contact (dropdown menu)

A red asterisk indicates required fields. The 'Save' button is highlighted with an arrow.

User 1 only sees the opportunity assigned to that user  
User 2 only sees the opportunity assigned to him.

**BUT:** both opportunities are tied to same contact.