

Role Assignments in Portal

Care should be taken when deciding what role to choose when setting up a new login to the portal. Each role has different access privileges:

Role Definitions

Operations:

- Has permission to create, view, and perform all functions on all opportunities
- Can reassign opportunities from any user to any other user
- Can access Opportunities, Sales Calculator/Loan Wizard, and Resources tabs, as well as Manage Logins, Equipment, and Notifications
- No access to Finance tab or disbursement emails

Sales Manager:

- Has permission to create, view, and perform all functions on all opportunities
- Can reassign opportunities from any user to any other user
- Can access Opportunities, Sales Calculator/Loan Wizard, and Resources tabs

Sales Rep:

- Has permission to create new opportunities and perform all functions on that opportunity, from credit through final completion
- Can view only their own opportunities
- Can reassign an opportunity to someone else, but cannot reassign someone else's opportunity to themselves
- Can access Opportunities, Sales Calculator/Loan Wizard, and Resources tabs

Admin:

- Has permission to create, view, and perform all functions on all opportunities
- Can reassign opportunities from any user to any other user
- Can access Opportunities, Sales Calculator, Resources, and Finance tabs, as well as Manage Logins, Equipment, and Notifications
- Admins have full access to all data in the portal.