User Permissions - Opportunities

These permissions determine how a user can interact with opportunity records which are used to track and manage a direct sales process. To access these User Permissions, go to **Admin > Users** and click **Edit Permissions** next to the user you would like to modify.

Can view all records

This permission controls the ability to view the opportunity records that are assigned to other users. If this permission is set to *No*, the user can view the opportunity records that they own or the ones that have been shared with them; they cannot view any other opportunity records. A contact may have multiple opportunities. Each opportunity can have a different assigned owner. A sales rep may own one or more opportunities for a contact, but may or may not be the owner of the contact record the opportunity is associated with.

Can edit all records

This permission controls the ability to edit opportunity records assigned to other users. If this permission is set to *No*, the user can edit the opportunities that they own or the ones that have been shared with them (with "write" access.) They will not be able to edit any other opportunity records, even if they can view them.

Can add

This permission controls the ability to create new opportunities. If this permission is set to *No*, the user will not see the option to *Add an Opportunity* and will not see the *Add Opportunity* button when viewing a contact record.

Can search

This permission controls the ability to search for opportunities through the quick search or view a list of opportunities.

Can delete

This permission controls the ability to delete opportunities. If this permission is set to *No*, the user will not see the *Delete* button on an opportunity record or the *Delete Opportunities* option under the *Actions* menu at the top of an opportunity search result.

Can edit closed leads

This permission controls the ability to edit an opportunity after it has been placed into the default *won* or *lost* stage. If this permission is set to *No*, the user will only be able to save changes to opportunities that are not in one of these 2 default stages.

Can reassign

This permission controls the ability to change the assigned owner of an opportunity record. The owner is usually the the sales rep who is actively working with the prospect. A sales manager may need to reassign opportunities from one rep to another; however, a sales rep probably would not be responsible for reassigning opportunities. If this permission is set to *No*, the user will not be able to change the assigned owner.

Can see tab

This permission controls access to opportunities through contact records. If this permission is set to *No*, the user will not see the *Opportunities* tab in the second row of tabs in contact records.

Can recreate pipeline reports

This permission controls the ability to create pipeline reports for sales rep users. The pipeline reports are created through *CRM > Settings > Sales Pipeline.* Pipeline reports are generally created by sales managers for their sales reps. The reports show up in the

Favorites menu on the user toolbar. If this permission is set to *No* the user is denied access when they click on the *Rebuild Pipeline* button.

Can view unassigned records

This permission controls the ability to see opportunities that have no assigned owner. If this permission is set to *No*, the user will not be able to view or edit any contact records that are not assigned to any of your users. A sales manager would need the ability to view (and edit) unassigned records to make sure no opportunities are being overlooked.

Can edit unassigned records

This permission controls the ability to edit the opportunities that have no assigned owner. If the *Can view unassigned records* permission is set to *Yes*, and this permission is set to *No*, the user will be able to view the unassigned opportunities, but will not be able to edit them.