



Security Roles

Security roles in dash will determine what actions a user will be able to process, what information they will be able to view, and what modules they will be able to access. You can assign multiple security roles to a user.

Brokerage Administrator



Accessible Modules



Listings



Franchise Billing



Transactions



Business Intelligence



People



ePay



Brokerage

Role Features

- Highest Access Level
- Grant users access to dash and brand applications
- Access and perform all available actions in every module
- Add company level announcements
- View Daily dash
- View Franchise Agreement
- Use ePay
- Create and track Business Plans
- Add, Select and Save Agents for Agent Recruitment Program
- Submit Agents for Agent Recruitment Program

User Role Recommendations

- Responsible Brokers
- Owners

Office Manager



Accessible Modules



Listings



Brokerage



Transactions



Franchise Billing



People



Business Intelligence

Role Features

- Grant users access to dash and brand applications
- Add company level announcements
- View Daily dash
- Create and use Business Plans
- Full access to Listings, Transactions and People modules
- Add, Select and Save Agents for Agent Recruitment Program

User Role Recommendations

- Office Managers
- Administrative Assistant

Finance Management



Accessible Modules



Transactions



Business Intelligence



Brokerage



ePay



Franchise Billing

Role Features

- Read-Only access to Transaction and Franchise Billing
- Access ePay
- You can layer this role with Office Manager for ePay access

User Role Recommendations

- Office Managers (*who need ePay*)
- Accounting Manager
- Bookkeeper
- CFO

Read-Only



Accessible Modules



Transactions



Franchise Billing



People



Business Intelligence



Brokerage

Role Features

- View-only right for accessible modules
- Cannot add and maintain records but can view potentially sensitive information

User Role Recommendations

- Partners
- Owners

Transaction Coordinator



Accessible Modules



Listings



Transactions



Business Intelligence

Role Features

- Read-only access to Listings
- Full access to view, add, and update Transactions
- Able to access and subscribe to reports

User Role Recommendations

- Accounting Manager
- Bookkeeper
- CFO (*who will also enter contractual information*)

Company Data Entry



Accessible Modules



People



Brokerage

Role Features

- View, add, and update records for sales associates and office staff
- View and edit company level information
- Add, Select and Save Agents for Agent Recruitment Program

User Role Recommendations

- Layer with office level roles
- Company Marketing Admin

Listing Coordinator/ Listing Data Entry



Accessible Modules



Listings



Business Intelligence

Role Features

- View, add, and update listings
- Approve listings , if applicable (*Listing Coordinator only*)
- Able to access and subscribe to reports

User Role Recommendations

- Listing Coordinators
- Marketing Directors
- Marketing Assistant

Resource Manager (+ Security)



Accessible Modules



People



Business Intelligence

Role Features

- Add and update records for sales associates and office staff
- Grant users access to dash and brand applications by assigning security roles and updating security preferences (*Resource Manager with Security only*)

User Role Recommendations

- Human Resources
- Recruiting Director

Sales Agent / Sales Agent Read-Only



Accessible Modules



Listings



Business Intelligence

Role Features

- View, add, and update their own listings
- Sales Agent Read-only can only view their own listings
- Able to view and subscribe to listing reports
- Can update their own web profiles in dash

User Role Recommendations

- Sales Associates