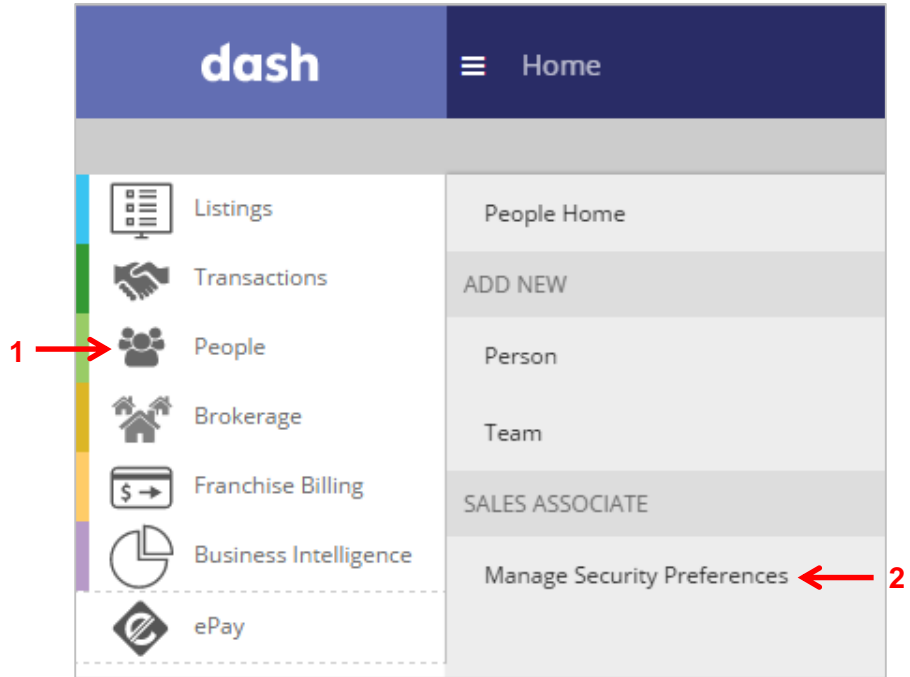


## Set Security Preferences

If you would like your sales associates to enter and update their own listings within dash, you can assign them the Sales Agent role.

In addition, dash allows you to set a security preference that automatically assigns this Sales Agent role to existing sales associates and new associates going forward.

1. Click **People** on the left navigation menu.
2. Click **Manage Security Preferences**.



The **Manage Sales Associate Access Preferences** page displays.

3. Click the radio button next to the appropriate option to either use the same preferences for all offices, or allow each office to have its own preference.

Manage Sales Associate Access Preferences

① If you would like automatically grant the Sales Agent security role to sales associate records going forward, simply check the desired office below. This default can be override within the Security tab when adding or updating an individual record.

② To grant the Sales Agent security role to all currently active Sales Associates, please use the buttons associated with each office below.

Use Same Preferences for all Offices
  Each office has its own Preferences **3**

	Automatically grant the Sales Agent Role to all Future Sales Associates		Total Active Sale Associates for office	Sale Associates with Sales Agent Role
0001-NON-AR CUSTOMER	<input checked="" type="checkbox"/>	<a href="#">Grant Sales Agent Role to all existing active Sales Associate</a>	168	168
0002-test	<input checked="" type="checkbox"/>	<a href="#">Grant Sales Agent Role to all existing active Sales Associate</a>	6	6

Cancel Apply

If you opt to give each office its own preference:

- Select the office(s) that you would like to automatically grant the Sales Agent role to existing and new sales associates.
- Click **Apply** to save.

Going forward, dash will assign the Sales Agent role to new sales associates that join only those office(s) that you have selected.

Manage Sales Associate Access Preferences

① If you would like automatically grant the Sales Agent security role to sales associate records going forward, simply check the desired office below. This default can be override within the Security tab when adding or updating an individual record.

② To grant the Sales Agent security role to all currently active Sales Associates, please use the buttons associated with each office below.

Use Same Preferences for all Offices  Each office has its own Preferences

	Automatically grant the Sales Agent Role to all future Sales Associates		Total Active Sale Associates for office	Sale Associates with Sales Agent Role
	<input type="checkbox"/>			
0001-NON-AR CUSTOMER	<input checked="" type="checkbox"/>	Grant Sales Agent Role to all existing active Sales Associate	168	168
0002-test	<input checked="" type="checkbox"/>	Grant Sales Agent Role to all existing active Sales Associate	6	6

Cancel 5 → Apply

If you opt to use the same preferences for all offices:

- Click **Apply** to save.

Going forward, dash will assign the Sales Agent role to new sales associates that join existing offices, as well as new offices your company may add in the future.

Manage Sales Associate Access Preferences

① If you would like automatically grant the Sales Agent security role to sales associate records going forward, simply check the desired office below. This default can be override within the Security tab when adding or updating an individual record.

② To grant the Sales Agent security role to all currently active Sales Associates, please use the buttons associated with each office below.

Use Same Preferences for all Offices  Each office has its own Preferences

	Automatically grant the Sales Agent Role to all future Sales Associates		Total Active Sale Associates for office	Sale Associates with Sales Agent Role
	<input type="checkbox"/>			
0001-NON-AR CUSTOMER	<input checked="" type="checkbox"/>	Grant Sales Agent Role to all existing active Sales Associate	168	168
0002-test	<input checked="" type="checkbox"/>	Grant Sales Agent Role to all existing active Sales Associate	6	6

Cancel 5 → Apply

A confirmation window appears.

- Click **OK** to return to the People homepage.

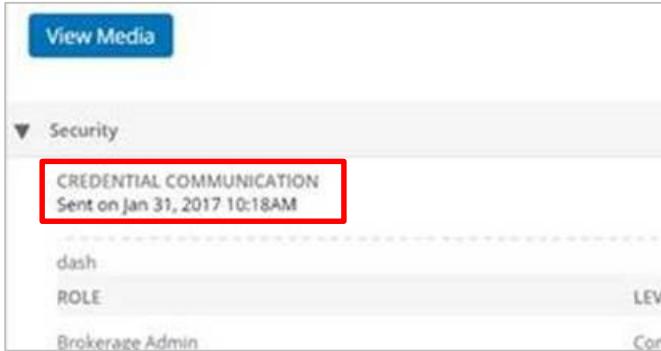
**INFO**

Sales Associate roles updated successfully

OK

At any time, you can see when the credential information was sent to the user by referring to the user's record.

In the **View Person** screen:



In the **Edit Person** screen:

