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.

			dash	≡ Home	
 Click People on the left navigation menu. Click Manage Security Preferences. 		l	Listings	People Home	
		5	Transactions	ADD NEW	
	1 —	→ ≌	People	Person	
		*	Brokerage	Team	
		\$-	Franchise Billing	SALES ASSOCIATE	
		C	Business Intelligence	Manage Security Prefe	erences 🔶 2
		Ø	ePay		
The Manage Sales Associate	Manage Sales	s Associate Access	Preferences		
Access Preferences page displays.	If you would like automatically grant the Sales Agent securinty role to sales associate records going forward, simply chech the desired office below. This default can be override within the Security tab when adding or updating an individual record.				
3. Click the radio button next to	1 To grant the	Sales Agent security re	O Use Same Preferences for all Offices	Each office has its own Preferences	3
the appropriate option to			Automatically grant the Sales Agent Role to all future Sales Associates	Total Active Sale Associates for	office Sale Associates with Sales Agent Role
preferences for all offices, or	0001-NON	I-AR CUSTOMER	Grant Sa	ales Agent Role to all existing 168	168
allow each office to have its	00	002-test	Grant Se	active Sales Associate ales Agent Role to all existing active Sales Associate	6
own preference.	Cancel				

			_				
If you opt to give each office its own preference:							
	Manage Sales Associate Acces	s Preferences					
4. Select the office(s) that you would like to automatically	If you would like automatically grant the Sales Agent securinty role to sales associate records going forward, simply chech the desired office below. This default can be override within the Security tab when adding or updating an individual record.						
grant the Sales Agent role to	U To grant the Sales Agent security role to all currently active Sales Associates, please use the buttons associated with each office below.						
existing and new sales		Automatically grant the Sales Agent]	Total Active Sale Associates for office	Sale Associates with Sales Agent Role		
associates. 5. Click Apply to save.			4				
	0001-NON-AR CUSTOMER	Q	Grant Sales Agent Role to all existing active Sales Associate Grant Sales Agent Pole to all existing	168	168		
Going forward, dash will assign the Sales Agent role to new	Cancel		active Sales Associate				
sales associates that join only							
selected.							
If you opt to use the same							
preferences for all offices.	Manage Sales Associate Access Preferences If you would like automatically grant the Sales Agent security role to sales associate records going forward, simply chech the desired office below. This default can be override within the Security tab when adding or updating an individual record.						
5. Click Apply to save.							
Going forward, dash will assign	10 grant the sales agent security role to all currency active sales associates, please use the outtons associated with each office below. Use Same Preferences for all Offices Each office has its own Preferences						
the Sales Agent role to new		Automatically grant the Sales Agent Role to all future Sales Associates		Total Active Sale Associates for office	Sale Associates with Sales Agent Role		
sales associates that join		0	Crant Salar Agent Bala to all evicting	168	168		
offices your company may add	0002-test		Grant Sales Agent Role to all existing active Sales Associate Grant Sales Agent Role to all existing active Sales Associate	6	6		
in the future.	Cancel						
	Sales Associate re	oles updated successfully					
A confirmation window appears.							
6. Click OK to return to the People homepage							
 Click OK to return to the People homepage. 							

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:

1	View Media	
v	Security	
	CREDENTIAL COMMUNICATION Sent on Jan 31, 2017 10:18AM	
	dash	
	ROLE	LEV
	Brokerage Admin	Con

In the Edit Person screen:

EDIT PERSON		
Albert Faiola PERSON ID : 0001		
Essentials	Positions	Pro
CREDENTIAL COMMUNICATION	Sent on Jan 31, 2017 10:18AM	
APPLICATIONS	dash	
	ROLES	DESCRIPTI