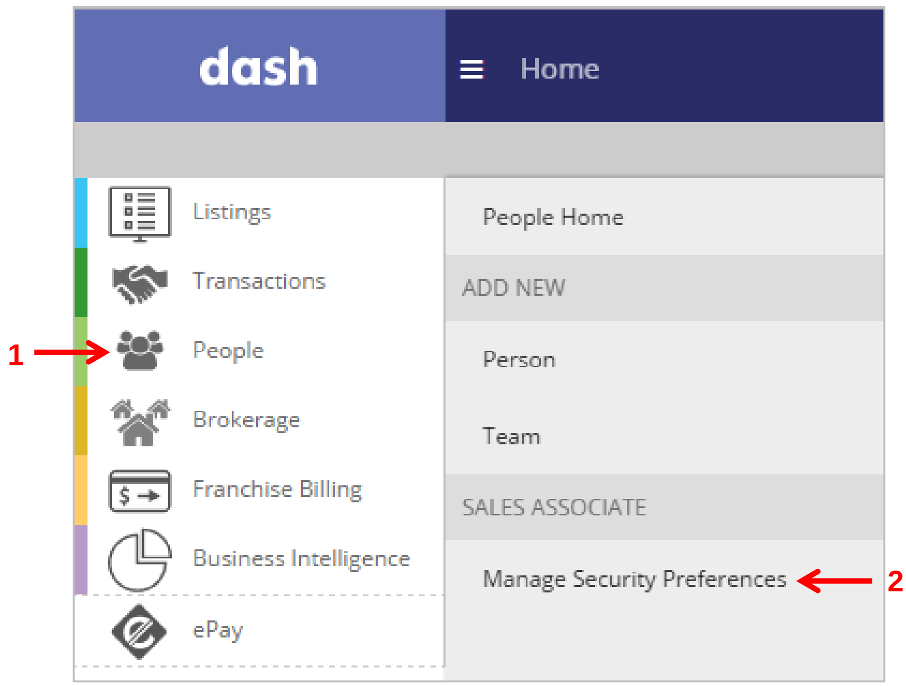
Set Security Preferences

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

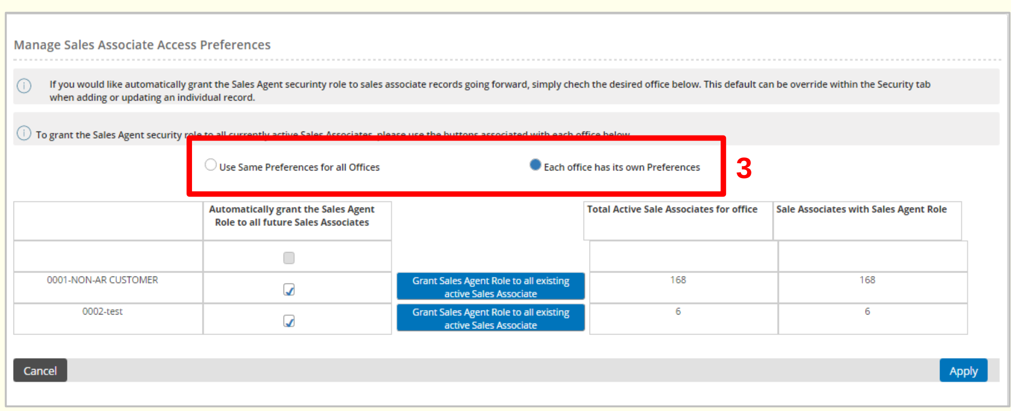
In addition, dash allows you to set a security preference that automatically assigns this Sales Agent role to existing sales associates and new associates going forward.

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



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

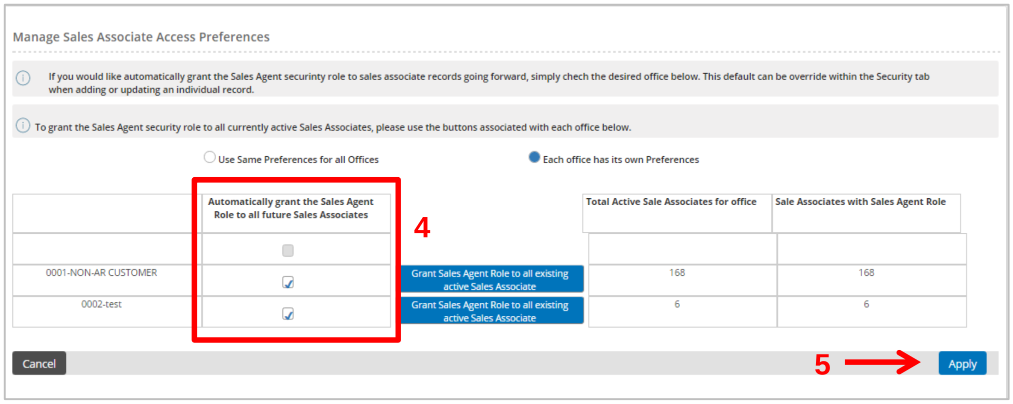
3. Click the radio button next to the appropriate option to either use the same preferences for all offices, or allow each office to have its own preference.



If you opt to give each office its own preference:

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

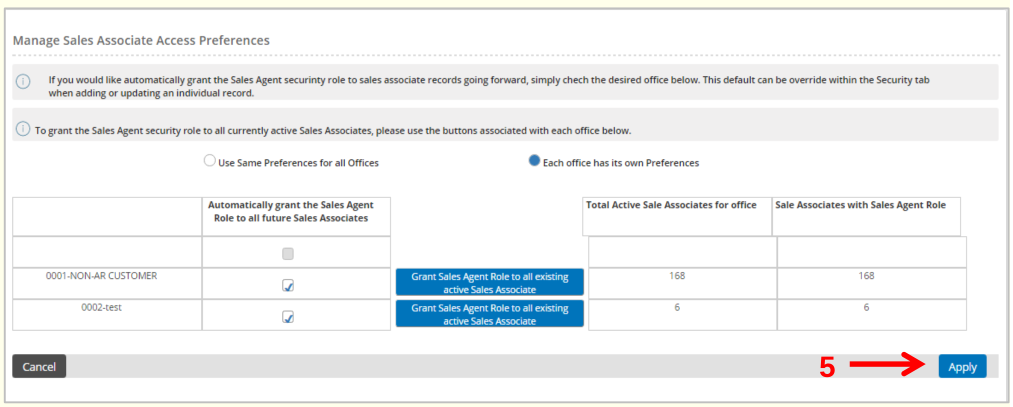
Going forward, dash will assign the Sales Agent role to new sales associates that join only those office(s) that you have selected.



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

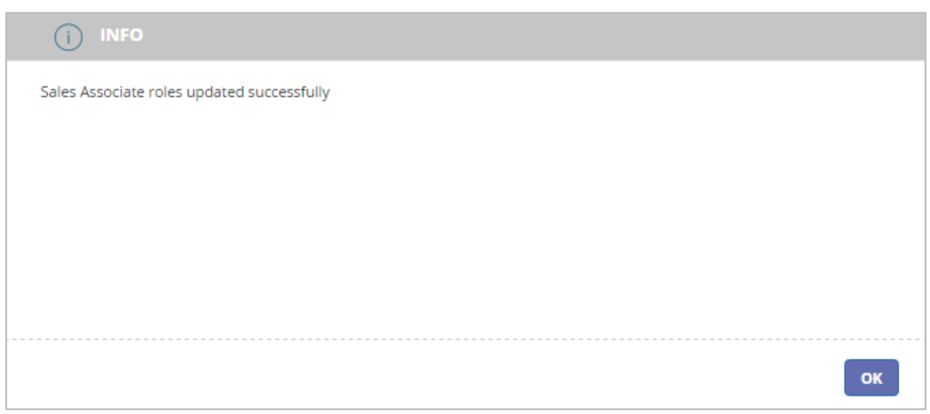
5. Click **Apply** to save.

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.



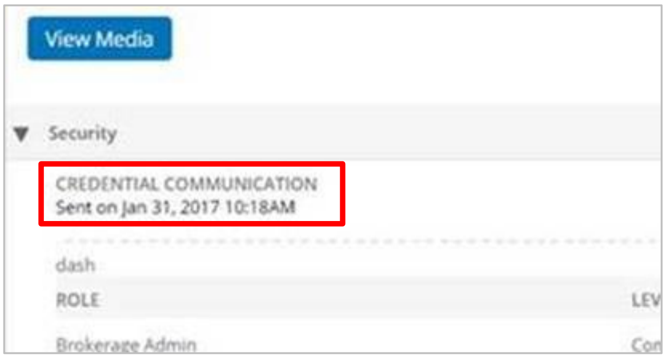
A confirmation window appears.

6. 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:*



*In the **Edit Person** screen:*