

Profile matrix in PiSA sales

The profiles in PiSA sales define e.g. which users can see corresponding tabs in the forms (View), can also edit records in these tabs or have the corresponding top menus available (Master) or also which users can access the corresponding administrator menus to make adjustments at selection menus etc. (Admin). Permissions are inherited from the View to the Master and from the Master to the Administrator.

Profile	View	Master	Admin	Developer
User (this default user)	Access to all objects of the application		Access to the Administration menu (complete)	Access to the Development menu
Customizing	Access to all customized objects, all customizations/changes are available for this user (rudimentary profile, provide for older versions for security)			
Documents			Administration of document attributes, duplicate functions for documents	
Echobot	Access to the Echobot interface			
ERP	Access to ERP features (only if ERP interface is used)		Mappings and synchronization (e.g. ERP Toolbox)	
External mail system	Access to interface ext. mail system (e.g. Inxmail, CleverReach)			
Questionnaires	Use of questionnaires	Create and customize questionnaires (Tools menu)	Admin menus; design questionnaires	
Google	The profile displays a second button at the appointment that creates a Google Meet.			
Contact management	Manage contacts, view contact link in all modules including activity management (default profile).		Admin menus; administration of contact attributes (selections), user administration, duplicate administration, processes	
MapPoint	Access to the MapPoint interface			

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Marketing	Access to link with marketing-relevant data, e.g. "Marketing" tab in contact form	Top menu, "Marketing", manage marketing actions, lead management, etc.	Admin menus; administration of marketing attributes (participant status, etc.), processes	
Mobile users	Using Mobile Replication	Create synchronization packages	Mobile replication management	
Objects	Objects" tab view	Top menu Objects; Manage objects	Admin menus; administration of object attributes (characteristics etc.)	
Office 365 (MS 365)	Use of the MS 365 interface for document processing and MS Teams			
Product configuration	Calling external configuration tools			
Product management	View of linked products and services	Top menu products, manage products and services, articles	Admin menus; administration of product attributes (units of measure, price lists, costing groups, etc.)	
Service	View of service links and contracts	Top menu Service, managing service operations, service objects, contracts, etc.	Admin menus; administration of service master data and attributes (calculation types, trip types, service message selections, etc.)	
Telephony	Access to CTI interface			
Distribution	Access to link with sales-relevant data, e.g. "Sales" tab in contact form	Top menu, "Sales", manage sales operations, lead management, etc.	Admin menus; administration of sales attributes (payment/delivery terms, reasons for loss, etc.)	
Template and report administration			Reports admin menu; administer, create, edit and manage templates, test	

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			templates, administer template attributes	