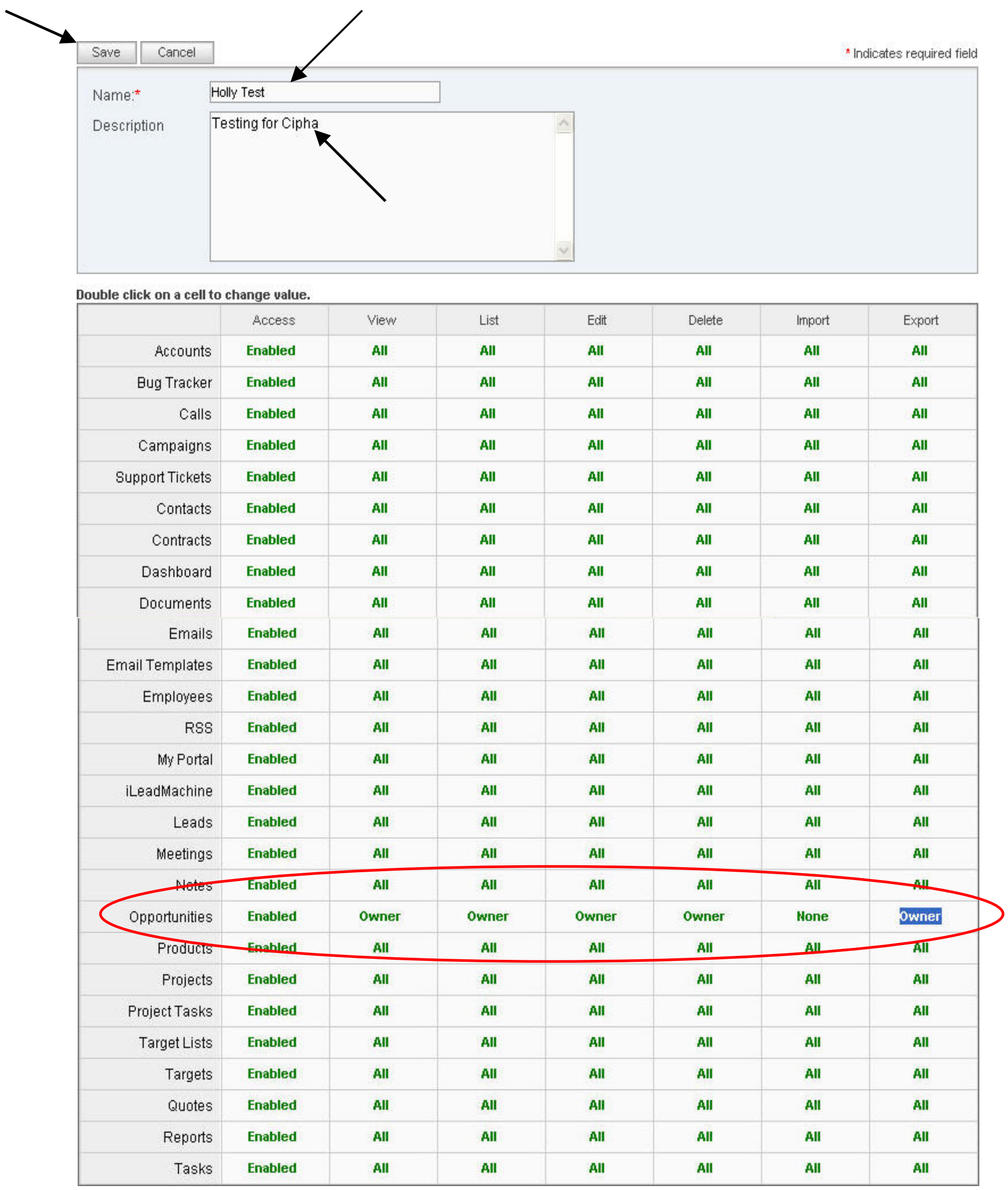
## Limiting Opportunities by User:

1. Click Admin,
2. Click Role Management,
3. Click Create Role in Shortcuts,

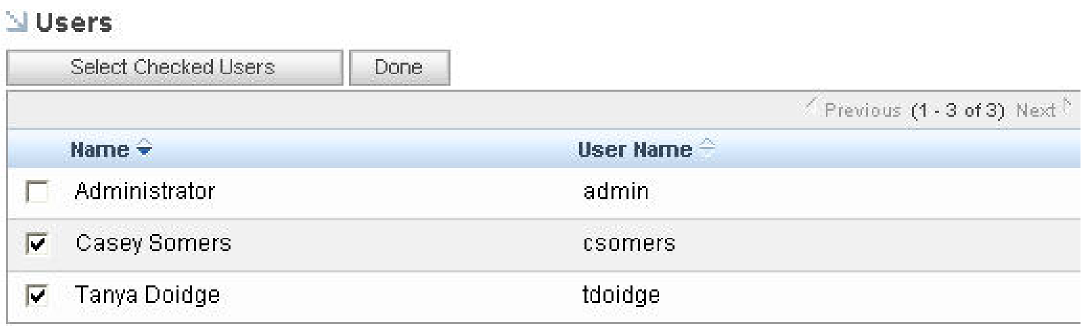

4. Enter Role Name. For documentation purposes we entered Holly Test.
5. Enter Description for Role,
6. Double click All in the Module for view, list, edit, delete, import and export and select Owner. For this example, we limited all functions in Opportunities to Owner
7. Click Save




| | Access | View | List | Edit | Delete | Import | Export |
|---|---|---|---|---|---|---|---|
| Accounts | Enabled | All | All | All | All | All | All |
| Bug Tracker | Enabled | All | All | All | All | All | All |
| Calls | Enabled | All | All | All | All | All | All |
| Campaigns | Enabled | All | All | All | All | All | All |
| Support Tickets | Enabled | All | All | All | All | All | All |
| Contacts | Enabled | All | All | All | All | All | All |
| Contracts | Enabled | All | All | All | All | All | All |
| Dashboard | Enabled | All | All | All | All | All | All |
| Documents | Enabled | All | All | All | All | All | All |
| Emails | Enabled | All | All | All | All | All | All |
| Email Templates | Enabled | All | All | All | All | All | All |
| Employees | Enabled | All | All | All | All | All | All |
| RSS | Enabled | All | All | All | All | All | All |
| My Portal | Enabled | All | All | All | All | All | All |
| iLeadMachine | Enabled | All | All | All | All | All | All |
| Leads | Enabled | All | All | All | All | All | All |
| Meetings | Enabled | All | All | All | All | All | All |
| Notes | Enabled | All | All | All | All | All | All |
| Opportunities | Enabled | Owner | Owner | Owner | Owner | None | Owner |
| Products | Enabled | All | All | All | All | All | All |
| Projects | Enabled | All | All | All | All | All | All |
| Project Tasks | Enabled | All | All | All | All | All | All |
| Target Lists | Enabled | All | All | All | All | All | All |
| Targets | Enabled | All | All | All | All | All | All |
| Quotes | Enabled | All | All | All | All | All | All |
| Reports | Enabled | All | All | All | All | All | All |
| Tasks | Enabled | All | All | All | All | All | All |

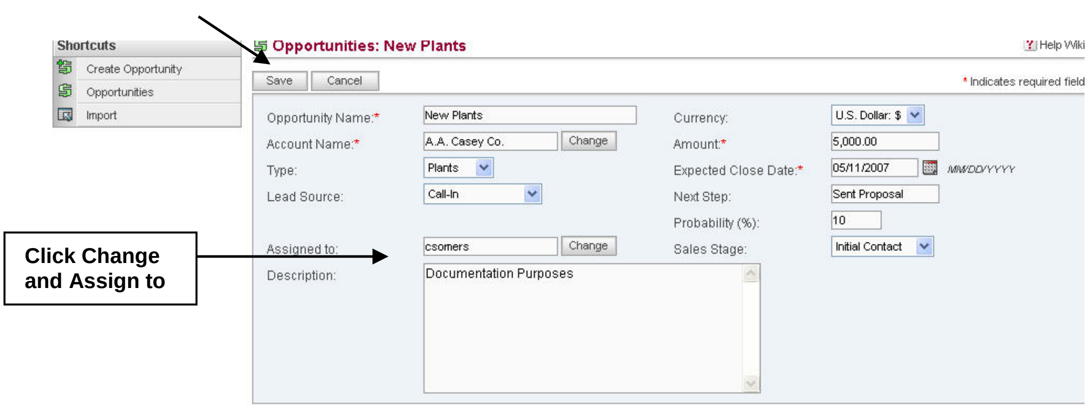
## Adding Users to New Role:

1. Click Role Management in Administration.
2. Double click on new role created (Holly Test).
3. Scroll to bottom of screen.
4. Click Add Users.
5. Select Users from list of users.
6. Click Select Checked Users.
7. Click Done.

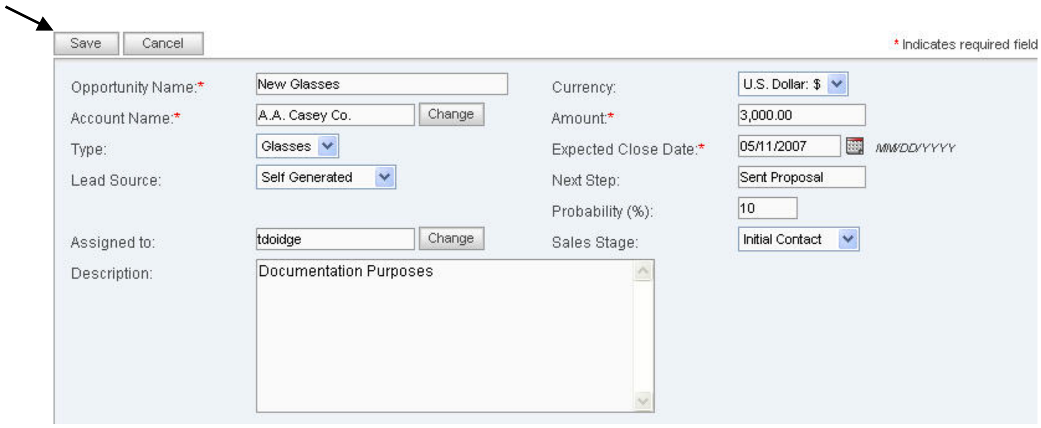



## Create New Opportunity:

1. Click Opportunity Tab
2. Click Create Opportunity in Shortcuts
3. Enter an Opportunity Name (required field). For documentation purposes, we entered New Plants.
4. Click Change and select an Account Name (required field).
5. Select Type from Drop Down
6. Select Lead Source from Drop Down
7. Select Currency from Drop Down
8. Enter Amount (required field)
9. Select Expected Close Date (required field)
10. Select Sales Stage from Drop down if do not want the default sales stage
11. Click Change and select user to Assign to (this is how the system will know to only show this user this opportunity). For documentation purposes we chose csomers.
12. Enter Description (optional)
13. Click Save



14. Create another opportunity following above steps. For our 2nd opportunity we named the opportunity Glasses and assigned it to tdoidge.




User 1 only sees the opportunity assigned to that user
User 2 only sees the opportunity assigned to him.

**BUT:** both opportunities are tied to same contact.