Complete Guide to Staff, Roles & Permissions

Getting Started Version 1.0 Updated 14 August 2026

The full user manual for creating staff accounts, assigning roles, configuring permissions, and managing secure access in the CRM.

Getting Started › Complete Guide to Staff, Roles & Permissions

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1. Introduction

Your CRM is a team tool. Staff members log in every day to manage properties, chase leads, run site visits, and update your website. This guide shows Tenant Super Admins how to add staff, choose the right role, control exactly what each person can see and do, and keep the workspace secure.

[Screenshot: Staff Dashboard]

2. Purpose of Staff & Role Management

* Give every team member their own login - no shared accounts.
* Limit each person to only what they need (principle of least privilege).
* Assign staff to specific cities so leads and listings route correctly.
* Instantly disable access when someone leaves.
* Keep an audit trail of who did what.

3. Staff Dashboard

Open Admin › Staff to reach the dashboard.

Staff Overview - counts of Active, Inactive, and Suspended users; plan limit usage (e.g. "7 of 10 Super Admin Staff used").

Staff List - every account with name, email, role, city, status, and last login.

Search - free-text search across name, email, and mobile.

Filters - narrow by role, city, status, and department.

Status column - colour-coded pills for Active / Inactive / Suspended.

Bulk Actions - select rows to activate, suspend, reassign city, or delete.

[Screenshot: Staff List with filters]

4. Adding a Staff Member (Step-by-Step)

1. Go to Admin › Staff and click + Add Staff.
2. Enter Full Name, Email, and Mobile Number.
3. Set Designation (and Department if used).
4. Pick a Role - this drives the default permission set.
5. Assign City (and optional Locality) access.
6. Fine-tune Permissions using the checkbox matrix.
7. Upload a Profile Photo (optional but recommended).
8. Choose Status: Active and click Save.
9. The staff receives an email invitation to set their password.

[Screenshot: Add Staff form]

5. Field-by-Field Explanation

Full Name (required) - shown throughout the CRM and in audit logs.

Email (required, unique) - the login ID; the invite link goes here.

Mobile Number (required) - used for notifications and password recovery.

Designation (optional) - job title, e.g. "Sales Manager".

Department (optional) - team grouping, e.g. Sales / Rentals / Marketing.

Role (required) - see User Roles.

Profile Photo (optional) - appears in the header, notifications, and reports.

City Assignment (required for City-scoped roles) - restricts data visibility to selected cities.

Locality Assignment (optional) - further narrows access inside a city.

Status (required) - Active, Inactive, or Suspended.

6. User Roles

[Screenshot: Role Settings]

7. Permissions

Permissions are the individual on/off switches applied on top of a role. Each staff member gets a checkbox matrix that includes:

* View Properties - see the property list.
* Add Properties - create new listings.

* Edit Properties - modify existing listings.
* Delete Properties - remove listings (Super Admin only by default).
* View Leads - see the lead list.
* Assign Leads - reassign leads to other staff.
* Schedule Site Visits - create and update visits.
* Edit Website Content - access the CMS and Templates.
* Manage Staff - add/edit other staff (Super Admin scope).
* Access Reports - view analytics dashboards.

Turning a permission off hides the corresponding button and blocks the underlying action at the server, so users cannot bypass it by guessing URLs.

[Screenshot: Permission Matrix]

8. City & Locality Access

City Admins and City Admin Staff see only the data tagged to their assigned cities. If Rohit is assigned to Kolkata only, he will not see properties, leads, or site visits in Mumbai - even if he opens a direct link.

Locality assignment narrows this further. A staff limited to Salt Lake and New Town will not see Ballygunge listings.

Super Admin and Super Admin Staff have all-city access by default.

[Screenshot: City Assignment]

9. Staff Status

10. Notifications

Staff receive alerts (in-app bell, sound on mobile, optional email) for:

* New Leads assigned to them.
* Site Visits scheduled, rescheduled, or completed.
* Property Assignments and status changes.
* System Alerts - approvals, plan limits, security warnings.

Super Admins additionally receive a copy of every alert sent to their Super Admin Staff.

11. Best Practices

* Assign the lowest role that lets the person do their job.
* Follow the principle of least privilege - start restrictive, expand on request.
* Review the staff list every quarter and disable unused accounts.
* Give each city its own City Admin so escalations stay local.
* Never share logins - audit logs become useless.
* Require every staff to enable a strong, unique password.

12. Tips & Recommendations

* Use profile photos - buyers on WhatsApp trust real faces.
* Suspend (don’t delete) staff on notice period so their history stays intact.
* Use bulk city reassignment when a team member moves branches.

* Turn on notification sound for on-field staff so no lead is missed.

13. Common Mistakes

* Giving every staff Super Admin Staff role for convenience.
* Wrong city assignment - staff sees no leads or every lead.
* Duplicate accounts for the same person (two emails).
* Leaving ex-employees Active for weeks after resignation.
* Removing "View Properties" but forgetting "Edit Properties" - a confusing half-permission.

14. Troubleshooting

Why can’t a staff member log in? Check that their status is Active and the invitation email was accepted. If forgotten, click Resend Invite.

Why can’t they see properties? Confirm the View Properties permission is on and they are assigned to at least one city that has listings.

Why can’t they access leads? Check View Leads. Also confirm the leads belong to their assigned city.

Why can’t they edit website content? The Edit Website Content permission is Super Admin scope by default. Grant it explicitly if a marketing staff needs access.

Why are notifications not arriving? Verify the notification sound is on (bell menu), the browser has notification permission, and the staff is actually the assignee of the record.

Why does the "+ Add Staff" button say limit reached? You have hit your plan’s staff cap. Upgrade the subscription or suspend an unused account.

15. Frequently Asked Questions

Q. How many staff can I add? Depends on your plan. See Subscription › Plan Details for Super Admin Staff, City Admin, and City Admin Staff limits.

Q. Can one staff belong to multiple cities? Yes. Assign multiple cities in the City Assignment field.

Q. Can I change a staff’s role later? Yes. Open the staff, change the role, and adjust permissions. Change is effective immediately.

Q. What happens to a staff’s leads when they are suspended? Leads stay assigned but the person cannot log in. Reassign to another staff via Bulk Actions.

Q. Can staff see each other’s leads? Not by default. Only if the Super Admin turns on shared visibility.

Q. Is deletion reversible? No. Deletion is permanent and audit-logged. Prefer Suspend unless you are certain.

Q. Do Platform Owners see my staff? Only for support and moderation. They cannot act on your behalf without your Super Admin explicitly permitting it.

16. Related Articles

* Property Management
* Lead Management
* Website Content
* Notifications

* Reports