Users & Security – Giving Escalation Permissions to Non-Admins

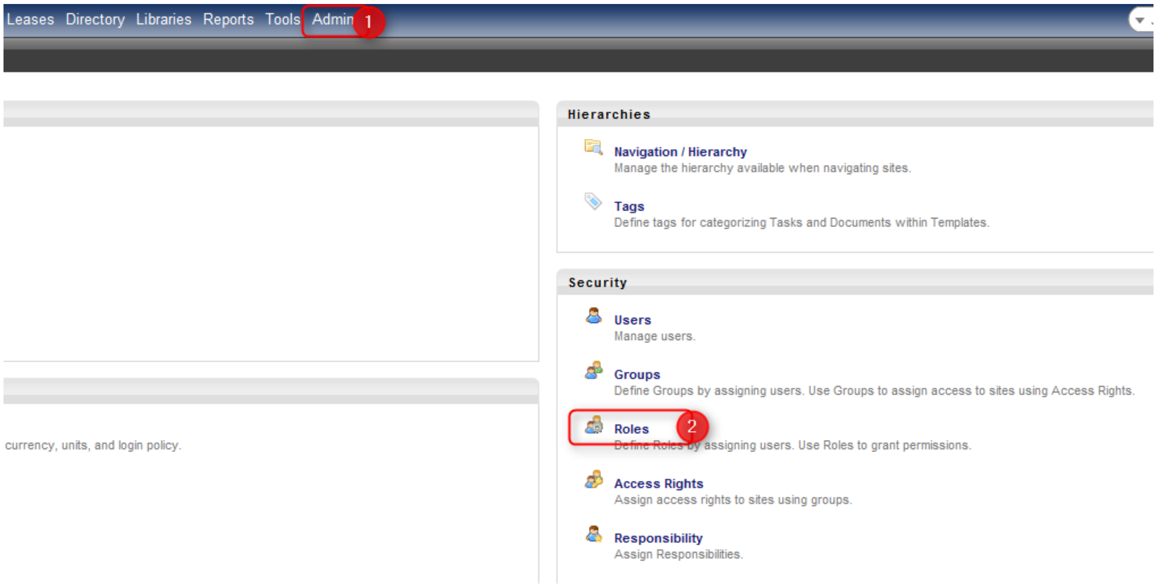
Question:

Some users need the ability to create Escalations on Leases and Payments. Can this be done by non-admin users?

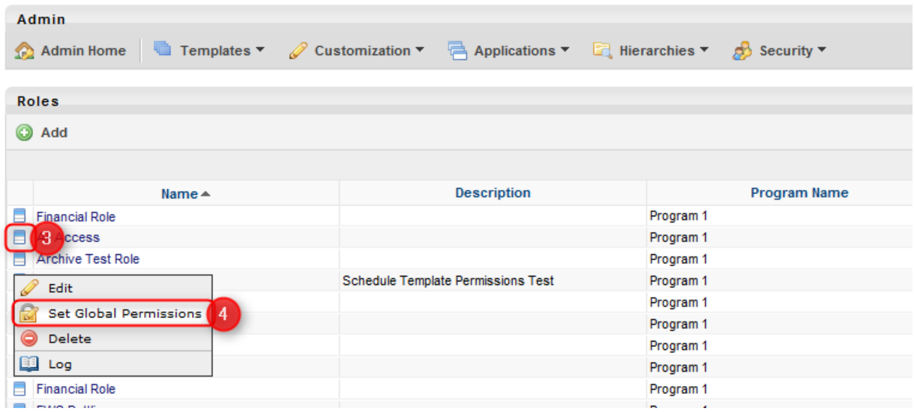
Answer:

The ability to create and update payment escalations (short or long term increases or decreases in the cost of a payment by percentage or gross amount) is given to administrative users by default, but it is possible to grant this ability to non-admins as well through a role's global permissions. The ability to set up Role Permissions requires administrator privileges.

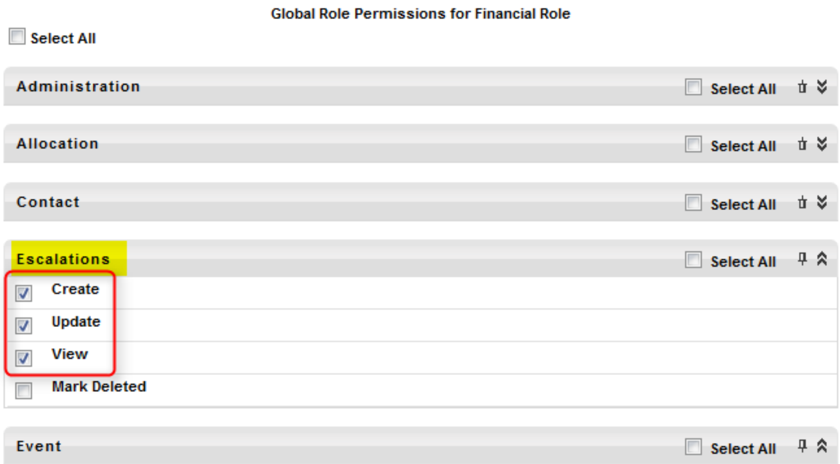
To do this, navigate to the “Admin”(1) tab, and select “Roles”(2) from the “Security” Section.



Find the appropriate role, click on the blue/white menu icon(3) to its left, and select “Set Global Permissions”(4).



There are a few things from the permissions list that must be checked off in order for a user with that Role to be able to add and edit escalations. They must have “View” and “Create'” permissions for the Escalation level in order to create new escalations, and 'Update' permissions to make additional changes once the initial creation is completed. They must also have permissions to “View” and “Update” both Leases and Payments as well; otherwise, they may be unable to navigate to the appropriate area or may encounter a blank space where the escalation “Add'” button should appear.



Once the permissions are saved, the user should now see the “Add” and “Add Multiple”(5) buttons in the Escalations section for any lease payment they have access to. (Note that a brief delay is possible between the granting of new permissions and the update to user access, but should not last beyond 15-20 minutes).