



Advantage Users Access Levels

Tasks	Admin (All Access)	Power User (Enhanced View)	Normal (Default View)	Data Entry (Limited View)
New Task	Yes	Yes	Yes	No
Edit Tasks	Yes	Yes	Yes	No
Calendar				
New Appointment	Yes	Yes	Yes	No
Manage Calendar Sync	Yes	Yes	Yes	No
Contacts				
List/Sort	Yes	Yes	Yes	Yes
Create New Contacts	Yes	Yes	Yes	Yes
Delete Contacts (individually)	Yes	Yes	Yes	Yes
Delete Contacts (mass delete)	Yes	Yes	No	No
Search Filters	Yes	Yes	Yes	Yes
Groups/Saved	Yes	Yes	Yes	Yes
Save Search	Yes	Yes	Yes	Yes
Add/Remove from Group	Yes	Yes	Yes	Yes
Change Category	Yes	Yes	Yes	Yes
Change AE (Account Executive)	Yes	Yes	No	No
Launch Taskomatic™	Yes	Yes	Yes	Yes
Duplicate Contacts (find & merge)	Yes	Yes	Yes	No
Email/Print	Yes	Yes	Yes	Yes
Export Contacts	Yes	Yes	Yes	Yes
Labels	Yes	Yes	No	Yes
Merge Contacts	Yes	Yes	Yes	Yes
Contact Touch Report	Yes	Yes	Yes	Yes
Marketing				
Email/Print	Yes	Yes	Yes	No
Post to Social Media	Yes	Yes	No	No
Process SRP/Sticky Point Leads	Yes	Yes	Yes	No
Sources/Sticky Points New Campaign	Yes	Yes	No	No
Edit/Delete Sources/Sticky Points	Yes	Yes	No	No
Email History	Yes	Yes	Yes	No
Scheduled Jobs	Yes	Yes	Yes	No
Editor Templates	Yes	Yes	Yes	No
Reports				
All Reports	Yes	Yes	Yes	No
Create Contact Report	Yes	Yes	No	No
Set Scheduled Reports	Yes	Yes	Yes	No
View Your Scheduled Reports	Yes	Yes	No	No
Edit/Delete Scheduled Reports	Yes	Yes	No	No
Customize What Reports I See	Yes	No	No	No

Property				
Browse Property	Yes	Yes	Yes	No
Add Location	Yes	Yes	No	No
Edit/Delete Location	Yes	Yes	No	No
Add Options Folder	Yes	Yes	No	No
Edit/Delete Option	Yes	Yes	No	No
Tools				
Editor	Yes	Yes	Yes	No
Taskomatic™ Editor	Yes	Yes	No	No
Follow Up Assistant Setup	Yes	Yes	No	No
Import Contacts	Yes	Yes	No	No
Manage	Yes	Yes	No	No
Referral Types	Yes	Yes	No	No
Removal Reasons (Occupancy)	Yes	Yes	No	No
Add/Delete Groups	Yes	Yes	Yes	No
Delete Saved Searches	Yes	Yes	Yes	No
Find Duplicate Contacts	Yes	Yes	Yes	No
Add/Delete Relationships	Yes	Yes	Yes	No
Add/Delete Responsibilities	Yes	Yes	Yes	No
Add/Delete Deposit Types	Yes	Yes	Yes	No
Add/Delete Wait List Types	Yes	Yes	Yes	No
Add/Delete Service Line	Yes	Yes	No	No
SRP Layouts	Yes	Yes	No	No
Add/Delete SRP Layouts	Yes	Yes	No	No
Add/Delete Regions	Yes	No	No	No
Settings				
Add/Edit/Delete Properties	Yes	Yes	Yes	No
Add/Edit/Delete Property Options	Yes	Yes	Yes	No
Administration (Additional access for administrators only)				
Manage Users: Add, Edit, Archive, Delete	Yes	No	No	No
Discovery Guide Editor : Add, Edit, Delete	Yes	No	No	No
Category & Filed Setup: Edit, New, Delete	Yes	No	No	No
Property Filed Setup: Edit	Yes	No	No	No
Sales Tracker Setup: New Reason, Edit, Delete	Yes	No	No	No
Traffic/Activity Setup: New Traffic/Activity, Edit, Delete	Yes	No	No	No
Campaign Setup: New Campaign, Edit, Delete	Yes	No	No	No
Restore Deleted Contacts: Search, Restore	Yes	No	No	No
Email Export Setup: Edit, Delete	Yes	No	No	No