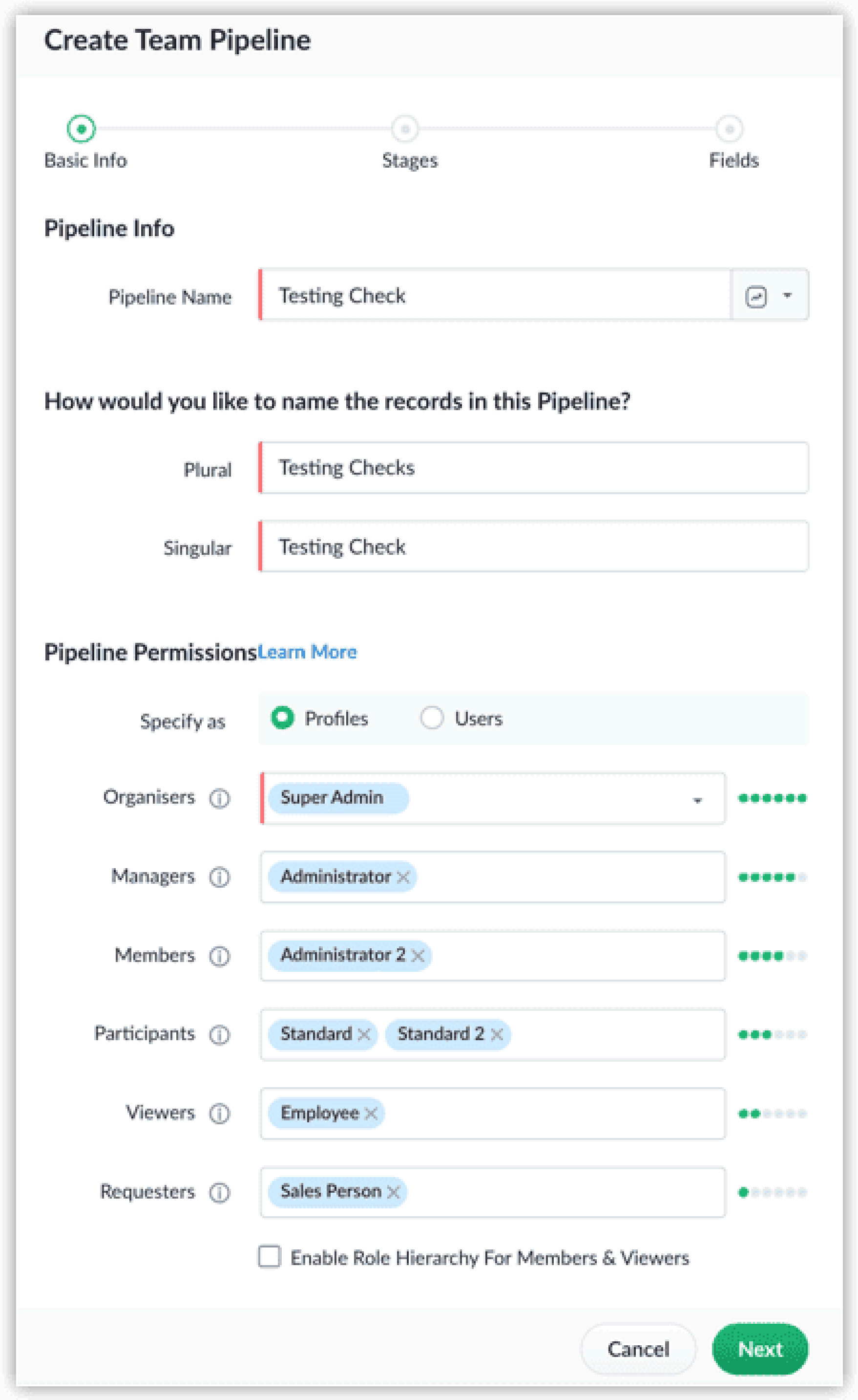
# Pipeline permissions

Within Bigin, team pipelines serve as visual representations of your sales or workflow processes, allowing your teams to track and manage leads, deals, or tasks efficiently. These pipelines provide a clear overview of the progress of each stage. With Pipeline Permissions, you can fine-tune access permissions for who can access the pipeline, based on the roles or profiles they belong to.

You have the option to set up your permissions in the *Pipeline Permissions* section of the pipeline creation tab. In this section, you will find six different levels:

- **Organizer:** Organizers can manage the team pipeline and have full access to actions like adding users, customizing stages or fields within the pipeline, and automating workflow processes.
- **Manager:** Managers have comprehensive access to all records within the pipeline, including the ability to create, edit, and delete records. However, they do not have permissions to organize or customize the pipeline, nor can they add or remove users in the respective team pipelines.
- **Member:** Users in the Members level can view all records in the pipeline, but can only edit or deletethe records that they own. They can't modify or delete other's records. If the **Enable Role Hierarchy** option is turned on for this pipeline, then they can also modify/delete records owned by their subordinates.
- **Participant:** Participants can only view, edit, or delete the records that they own. They can't view other's records in the pipeline.
- **Viewer:** Viewers have view-only access to all the records in the pipeline. They can't edit or delete any records in the pipeline.
- **Requester:** Requesters are typically users outside a team pipeline who can add records to a pipeline and track their status, but they cannot edit or delete records they created. The Requester permission is designed to address a unique use case in organizations. Consider an example where an organization uses Bigin to manage work between multiple teams like Sales, Help Desk, HR. In this case, members of the respective teams will be in the respective pipeline and won't have access to other pipelines. Let's say a sales rep needs to report an issue faced by their prospect to the Help Desk team. In this case, the sales representatives can be added as requesters to the Help Desk pipeline. This way, they can create a ticket in the Help Desk

pipeline from the *My Requests* section and track the ticket's progress.



**Notes:**

- For Organizer, Role Hierarchy doesn't affect Administrator Profiles and Super Admins, even when role hierarchy is enabled.
- For viewers, Sheet View is not provided, as they do not have the permissions to edit, but they can have a quick preview of the records.
- For requesters, they have the option to preview the records quickly, but they do not have access to view the notes. They can view the records only in a list view, and they cannot export the records.
- Organizers of a team pipeline are the only ones who can access the advanced features of that team pipeline. Users with other permission levels, even if they are the owners or creators of the configuration, will not have access to them.

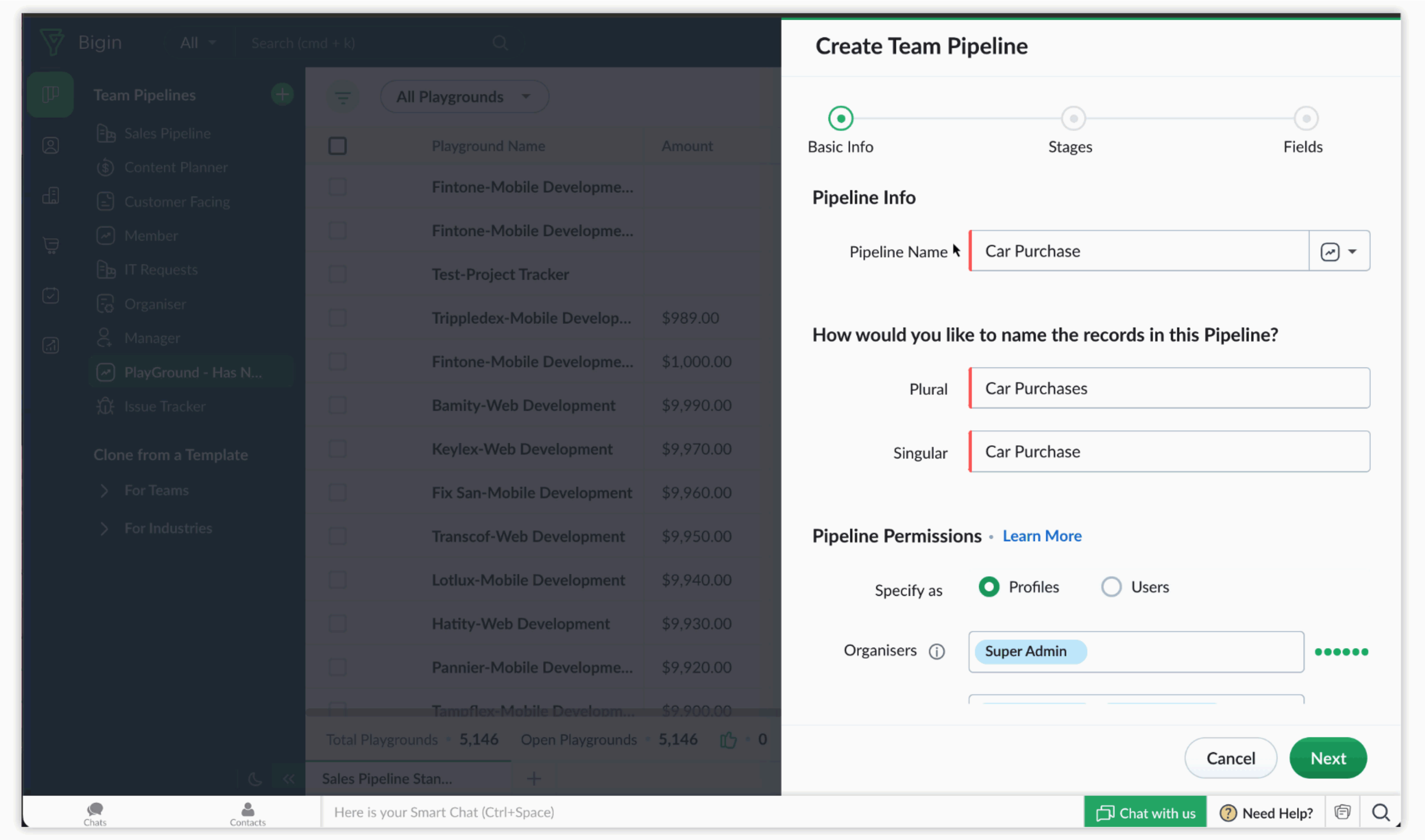
  Advanced Features - WorkFlow, Webform, Bulk Actions, Stage Transition Rules, Restrict Deal Closure, Stage Automation, Email Templates, Data Administration and Integrations.

The permission levels for different actions are outlined below for each role.

| Permission level | | Organiser | Manager | Member | Participants | Viewer | Requester |
|---|---|---|---|---|---|---|---|
| Add/ Remove users | | All records | No | No | No | No | No |
| Customize Stages & Fields | | All records | No | No | No | No | No |
| Record Visibility | Role Enabled | Own, Shared, and Subordinate | Own, Shared, and Subordinate | Own, Shared, and Subordinate | Own records | Own, Shared, and Subordinate | Created records |
| | Role Disabled | All records | All records | All Records | Own records | All Records | Created records |
| Create Records | | Yes | Yes | Yes | Yes | No | Yes |
| Edit Records | Role Enabled | Own, Shared, and Subordinate | Own, Shared and Subordinate | Own, Shared, and Subordinate | Own records | No | No |
| | Role Disabled | All records | All records | Own records | Own records | No | No |
| Delete Records | Role Enabled | Own, Shared, and Subordinate | Own, Shared, and Subordinate | Own, Shared, and Subordinate | Own records | No | No |

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| | Role Disabled | All records | All records | Own records | Own records | No | No |

These details are also available in a table format, as well as a tooltip in the *Pipeline Permissions* section.




## Use Cases

Consider a scenario where you are the admin of a real estate company, and you are using Bigin to manage your customer data. You have different pipelines to manage each stage of the process, and you want to provide precise permissions on who can access those pipelines. To start with, we will have a look at the permissions that you will have as an admin.

**Organizer:** As the admin, you have the authority to add new team members, configure property listings, arrange meetings, and streamline the workflow of property transactions. You can also set up automation for tasks such as property inquiries, scheduling viewings, and sending notifications to relevant parties.

**Manager:** The manager of your company will a able to oversee multiple properties and transactions. With full access to all property records and transaction details, your manager can monitor the progress of deals, coordinate with clients and agents, and make necessary adjustments to listings or contracts. However, your manager doesn't have the authority to modify the pipeline's structure or add/remove users.

**Member:** The realtors in your organization are responsible for handling property listings, communicating with clients, and facilitating transactions. They can create, edit, and manage property listings within their profiles, as well as collaborate with colleagues on shared listings.

**Participant:** Consider a scenario where you have a potential home buyer or tenant. Their access is limited to properties assigned to them by her agent or properties they have interest in. They can view property details, schedule viewings, and communicate with the agent regarding their preferences and questions.

**Viewer:** The CEO/owner of the company will be an observer, perhaps a supervisor or analytics specialist. While they don't have the ability to create or modify property listings, they can access all data and metrics related to property transactions and market trends. They focus on analyzing the information to provide insights and recommendations to the management team.

**Requester:**

**A Bigin user becomes a Requester:** Imagine a realtor who needs to request maintenance or repairs for a rental property. They can navigate to the maintenance request section and submit a new request detailing the issue. As a requester, they can track the status of their maintenance requests and ensure timely resolution to maintain their property's condition and tenant satisfaction.

**An outsider/public user becomes a Requester:** Imagine a potential buyer or seller interested in providing feedback on their experience. The agency enables public feedback submission through their website, allowing them to submit feedback on property viewings, agent interactions, or overall satisfaction with the service provided.