

## Allied Financial Software Knowledgebase

### Limited Access to Specific Contacts

Limited Access Feature in ACT!

Unlike many other CRM systems on the market today, ACT! Premium DOES allow the ability to limit access of specific Contacts to specific users and/or teams of users.

The Access Level section located on the layouts allows the Record Manager or an Administrative user to designate who should have access to the specific contact's record.

This should help.

#### How to Change Access Level En-Masse

To change the access level for multiple contacts at once, you must create a lookup of those contacts you want to change.

From the Contact List View, highlight the contact and right click to show the context menu.

Choose Edit Contact Access> Create New Access List.

Add the users and/or teams that should have access to these contacts.

This will update all of the contacts in the lookup to the new Access Level.

#### Setting Defaulted User's Access Level

To set each user's defaulted access level, you will have to modify each user's Startup Preferences in ACT!

From each workstation, choose Tools>Preferences> Startup tab> Record Creation Options. Determine the default behavior for Contacts, Groups, Companies and Opportunities.

Again, Administrative users will have access to all records except for those marked Private where the Admin user is not the record manager.

## Calendar Sharing

Calendar sharing is a part of ACT!'s default features. You cannot fully hide other user's calendar's but if the contacts are Private or Limited in Access, the activity will not show who it is scheduled with.

To Grant others access to your calendar for creating activities, each user would need to choose Schedule > Grant Calendar Access. The Calendar Access window will give the user the ability to control who has View only or View and Schedule access to their calendar.

To filter someone else's calendar use the filter Select Users and select whose calendar you want to add to the current view.

<http://kb.actforadvisors.com/questions.php?questionid=234>