User Permissions for the Lead File

Last Modified on 08/25/2023 6:55 pm EDT

There are several User Permissions related to the Lead File. These permissions allow the User to perform tasks such as emailing leads or restoring a lead file.



User Permissions play a crucial role in protecting your data by controlling who can access, modify, or perform specific actions in your system. Review **Protect Your Account - User Permission Guidelines** for more information.

To adjust a User's permissions, go to the **Gear** icon > **Settings** > **Users & Permissions** > **User IDs** (click on a User ID) > **User Permissions** (left menu). **Note:** Users who are logged in when their permissions are changed will have to log out and back in for the changes to take effect.

Permissions Related to the Lead File

Category	User Permission	Enables Access to
Families	Lead File - Access	View and search existing leads only.
	Lead File - Manage	Edit/archive/restore a lead.
	Delete Leads	Delete a lead from the Lead File.
	Lead File - Email	Email leads.
	Lead File - Mass Archive	Perform a mass archive.
	Lead File - Export Leads	Export all leads to a file.



See Permissions for Jackrabbit Users for more information.