

Confidential Projects

03/04/2025 10:54 am MST

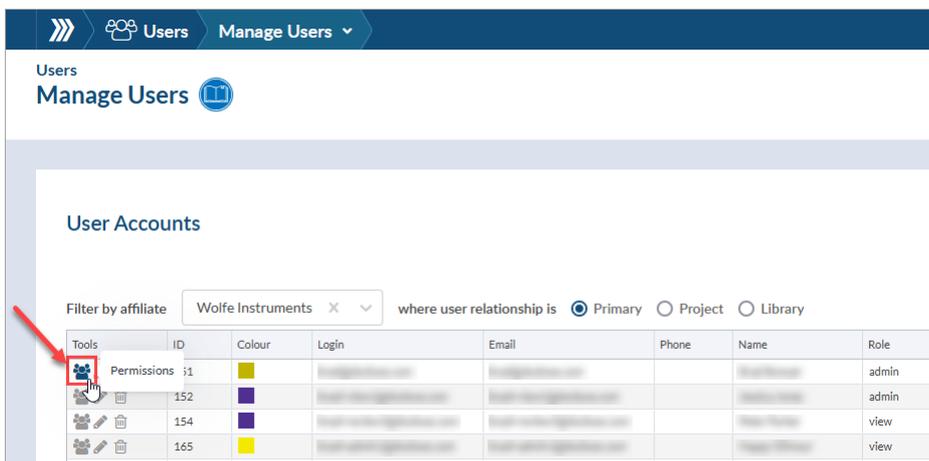
When setting up a project, you have the option to make the project confidential. Enabling this option **blocks access** to the project unless a user is specifically granted access to it, which can be useful in cases where the project contains sensitive information.

Admin users have the ability to grant non-admin users access to confidential projects. Admin users can also grant themselves access so long as they have the appropriate affiliate access.

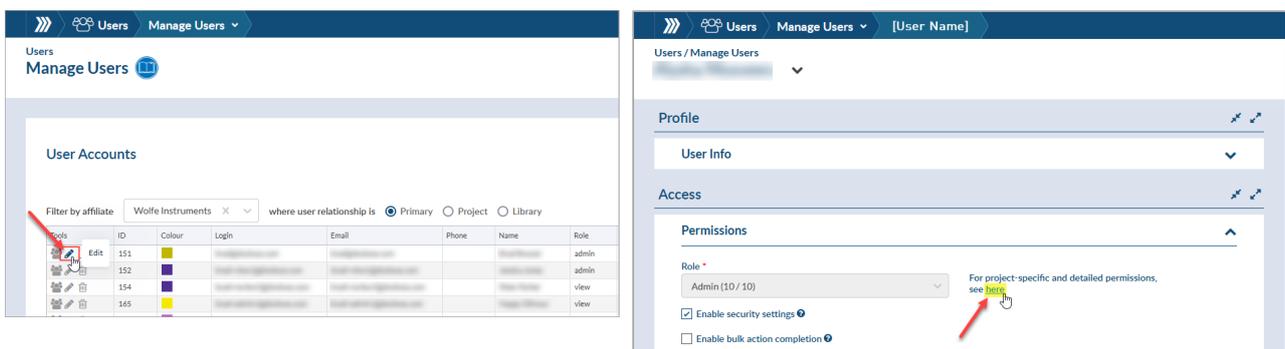
Granting access

To add a user to a project, navigate to **System Menu > Users > Manage Users**.

For the user you are looking to add to the project, click on the first icon under "Tools" to access the users permission settings.



Alternatively, you can select the pencil icon under "Tools" and once redirected to the users account settings, click the link for project-specific and detailed permissions (**Access > Permissions**).



From the user's permission settings:

1. Open the "Project" settings (second tab above the grid).
2. Find the confidential project in the grid* and enable access.
(*Note: Available actions are limited by the user's role*)

3. Click "Save" to update the user's permissions.

Global **Project** Companies Contacts Relationships

Grid row colors

Project	Affiliate	Confidential	<input type="checkbox"/> Full	<input type="checkbox"/> Edit	<input type="checkbox"/> Review	<input type="checkbox"/> View	<input type="checkbox"/> Delete	<input type="checkbox"/> Estimate	<input type="checkbox"/> Upload
ALY Test Company (4531AM)	Wolfe Instruments	Y	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Save

*Confidential projects will be highlighted in the grid, as well as display a green "Y" under the "Confidential" column. The project name can be identified by the sales order number identified in the "Project" column.