

2. Employees: Use Cases

Use Case #1: Onboarding New Hires

When a new employee joins, you create their profile in the Employees module, assign them to the correct Project (e.g. “Acme Europe”) and Desk (e.g. “Sales”), and grant them the appropriate Role (e.g. “Sales Rep”). They immediately gain access to only the data and CRM workflows they need, streamlining ramp-up.

Use Case #2: Department Transfers

If Jane moves from Support to Customer Success, update her Desk assignment from “Support Queue” to “Customer Success.” Her permissions, client access, and dashboard views shift automatically—no need to recreate accounts or manually revoke old rights.

Use Case #3: Cross-Project Collaboration

A data analyst must pull reports across multiple business lines. Assign them to both the “Consulting” and “Real Estate” Projects with the “System Analyst” role. They’ll have view-all permission on Desks in each project, enabling consolidated analytics without over-granting edit rights.

Use Case #4: Delegating Client Management

For VIP clients, designate a senior employee as the client manager by linking them in the Clients module. That employee gets view/manage access to everything under that client—Documents, Transactions, Requests—while the rest of their team remains scoped to other clients.

Use Case #5: Offboarding & Access Revocation

When an employee departs, mark their status “Inactive,” remove all Project and Desk assignments, and disable their authentication tokens. This immediately cuts off CRM access, protecting sensitive data and ensuring compliance with security policies.

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