

Roles, Teams & Permissions

The two halves of access

EspoCRM controls access with **Roles** and **Teams**, working together:

- **Roles** decide *what a user can do* — which record types they can see, create, edit, or delete, plus any administrative abilities.
- **Teams** decide *whose records a user can see* — records are shared with teams, and members of a team can see them.

A user can hold several roles and belong to several teams; their effective access is the **combination**.

Roles

- Administration → **Roles**.
- A role grants permissions per record type (Contacts, Engagements, Sessions, ...) — typically **None / View / Edit / Create / Delete** — and a **scope** (all records, just their team's, or just their own).
- CBM's roles are already set up to match job functions. **Prefer assigning an existing role** over inventing new ones.

“ **Least privilege:** give people the access their job needs and no more. Widening access later is easy; clawing it back after data has been over-exposed is not.

Teams

- Administration → **Teams**.
- Teams group users and act as the unit of record sharing.
- Add someone to a team from either the user record or the team record.

How they combine — an example

A mentor holds the *Mentor* role (view/edit engagements for their team, no delete) **and** belongs to the team that owns their engagements → they see and update *their* engagements and session notes, and nothing else.

Changing roles or teams safely

- A role or permission change affects **everyone** with that role at once.
- **Test in the Sandbox first** (the golden rule from [Signing In & the Administration Panel](#)): confirm a typical user sees exactly what you intend, then apply in Production.
- After the change, spot-check with a real user in that role.

“ Permission changes that **broaden** access can expose data unintentionally. Treat them like configuration changes ([Chapter 3](#)), not casual edits.

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