

Solaro CRM Organization & Role-Based Access Guide

How executive leadership, directors/admins, teams, and sales reps connect inside a multi-team Solaro CRM organization.

SOLARO CRM – ORGANIZATION STRUCTURE & ACCESS MODEL

Each Director/Admin Manages Their Own Team. Total Clarity. Total Control.



WHAT OWNERS / EXECUTIVES SEE

- ✓ Company-wide dashboard
- ✓ All directors, all teams
- ✓ All leads, opportunities & pipelines
- ✓ All territories & maps
- ✓ All calendars & activities
- ✓ All reports & analytics
- ✓ AI insights & recommendations
- ✓ Billing, plans & integrations
- ✓ User management & roles
- ✓ System settings & security



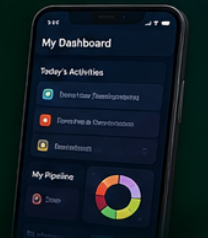
WHAT DIRECTORS / ADMINS SEE

- ✓ Their own team dashboard
- ✓ Leads assigned to their team
- ✓ Team pipeline & performance
- ✓ Team territories & map
- ✓ Team calendar & activities
- ✓ Team reports & analytics
- ✓ Team campaigns
- ✓ Manage team members
- ✓ Team settings & permissions



WHAT REPS SEE

- ✓ My Dashboard
- ✓ My Leads & Opportunities
- ✓ My Pipeline & Deals
- ✓ My Calendar & Activities
- ✓ My Tasks & Follow-ups
- ✓ My Campaigns
- ✓ AI Assistant (Personal)
- ✓ My Profile & Settings
- ✓ Team Chat & Notifications



SOLARO CRM – POWERFUL TOOLS FOR EVERY ROLE



The access model

Owners / executives have company-wide oversight across every director, team, territory, pipeline, report, and major setting. **Each Director/Admin is explicitly connected to one team** and sees that team's dashboard, leads, pipeline, territory, calendar, activities, reports, campaigns, members, and team settings. **Sales reps** work inside their own team and primarily see their own leads, opportunities, pipeline, territory, calendar, tasks, campaigns, AI assistant, profile, chat, and notifications.

The model scales horizontally: additional directors can be added, each with a separately connected team. This keeps team data isolated while preserving full visibility for the organization's highest-level leadership.