



Profiles and permissions

How the role system works: what each profile sees, how roles are assigned and which content is visible to whom.

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1. Profiles and permissions

How the role system works: what each profile sees, how roles are assigned and which content is visible to whom.

1.1 Assigning and changing a user's profile

Updated on 01/08/2026

How to add a resident, appoint board officers and give a supplier's workers access to the app.

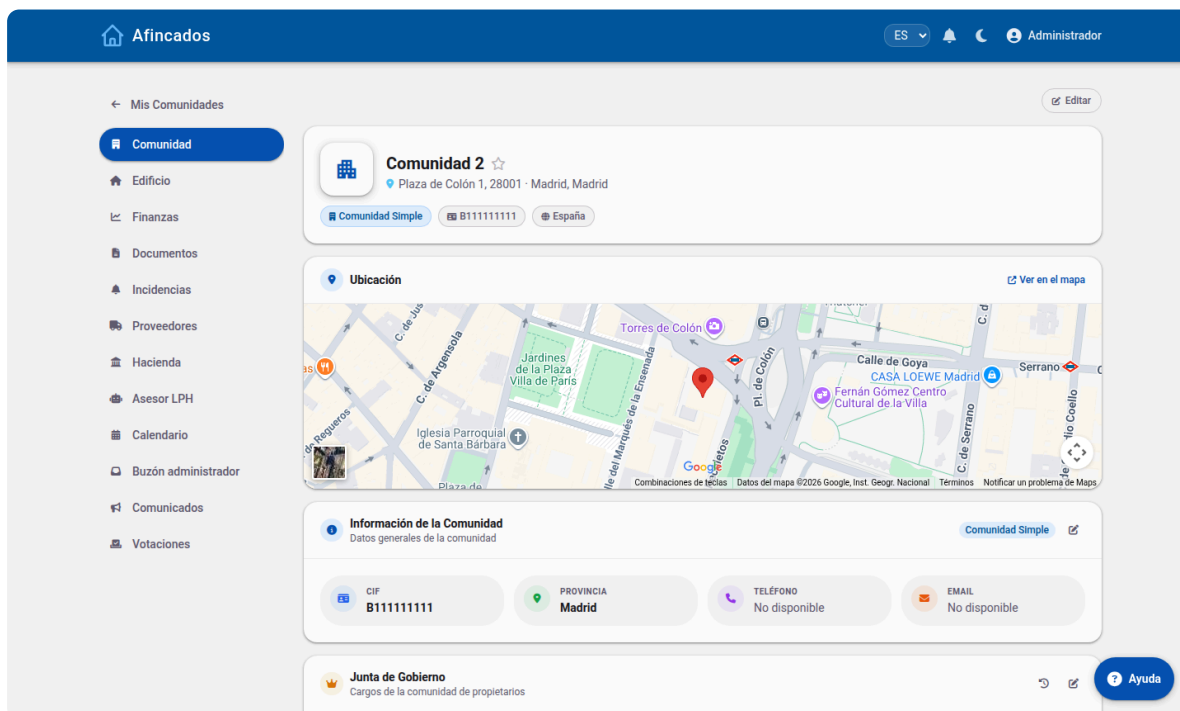
A user's profile is not picked from a standalone permission screen: **it follows from what that person is in the community**. A registered owner is a resident; if they also hold a board office, they get board permissions; and someone working for a supplier signs in as a worker. Each case is handled in a different place.

Who can do it

The **property manager** and the members of the **board**. Neither residents nor workers can change their own profile or anyone else's.

Adding a resident

From the **Community** tab, in the users block. Registering an owner or tenant and linking them to their property gives that person access with the **resident** profile.



The community record holds the general data, the users and the board.

Double-check the **email**: access, meeting notices and urgent alerts all go there.

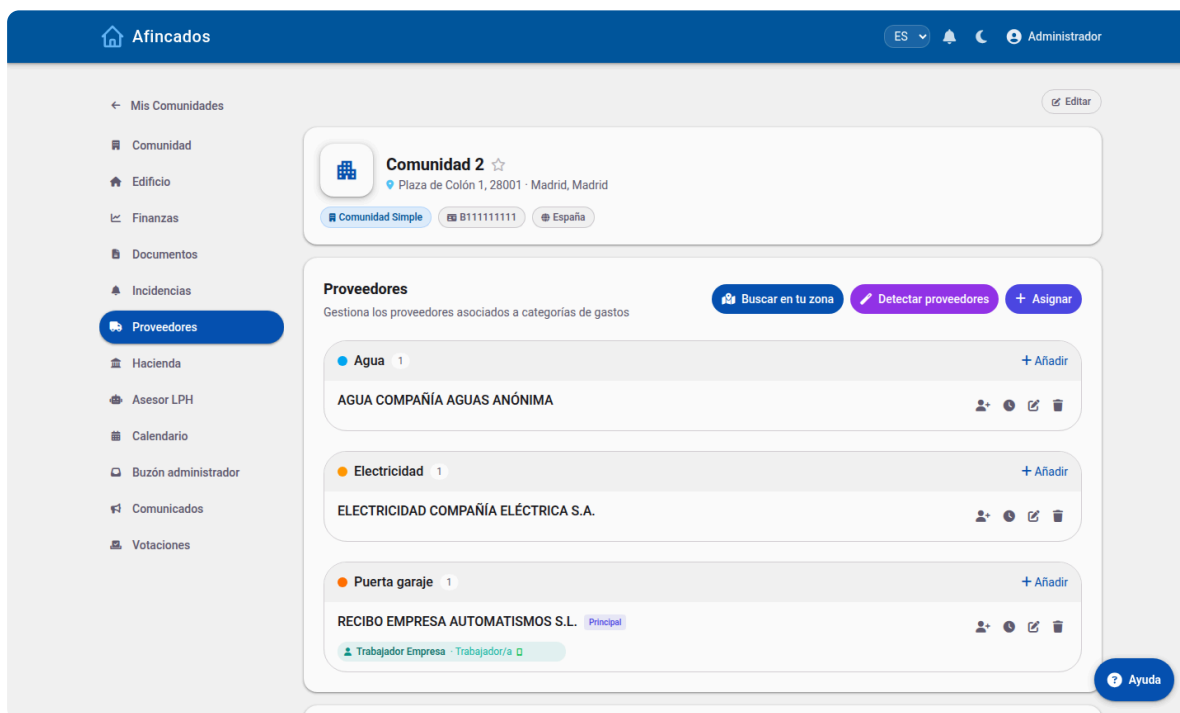
Appointing a president, vice-president or board member

Board permissions come with the **office**. In the same **Community** tab, the **Board** block lists the current officers and their history. Give a resident an office and they start managing the community with the board permissions described in the [President and board guide](#).

It works the same way in reverse: when the term ends, the person **becomes a resident again** and the management actions disappear. The history keeps who held each office and when — what you need when the board is renewed after the annual meeting.

Giving a worker access

Workers are not added as residents: they hang off a **supplier**. In the **Suppliers** tab each supplier has its **people**, and those people sign in with the **worker** profile.



Each supplier lists its shifts and the people with app access.

Their access is limited to the community — or communities — the supplier serves.

Worth remembering

- The profile is **per community**: changing it in one does not affect the others.
- A profile change shows up in the user's **menu**: tabs appear or disappear the next time they sign in.

- To cut off access for someone who is no longer an owner, remove them as a community user; removing the office is not enough.

1.2 How profiles and permissions work

Updated on 01/08/2026

The four Afincados profiles, what determines each user's view and why the menu changes from one person to another.

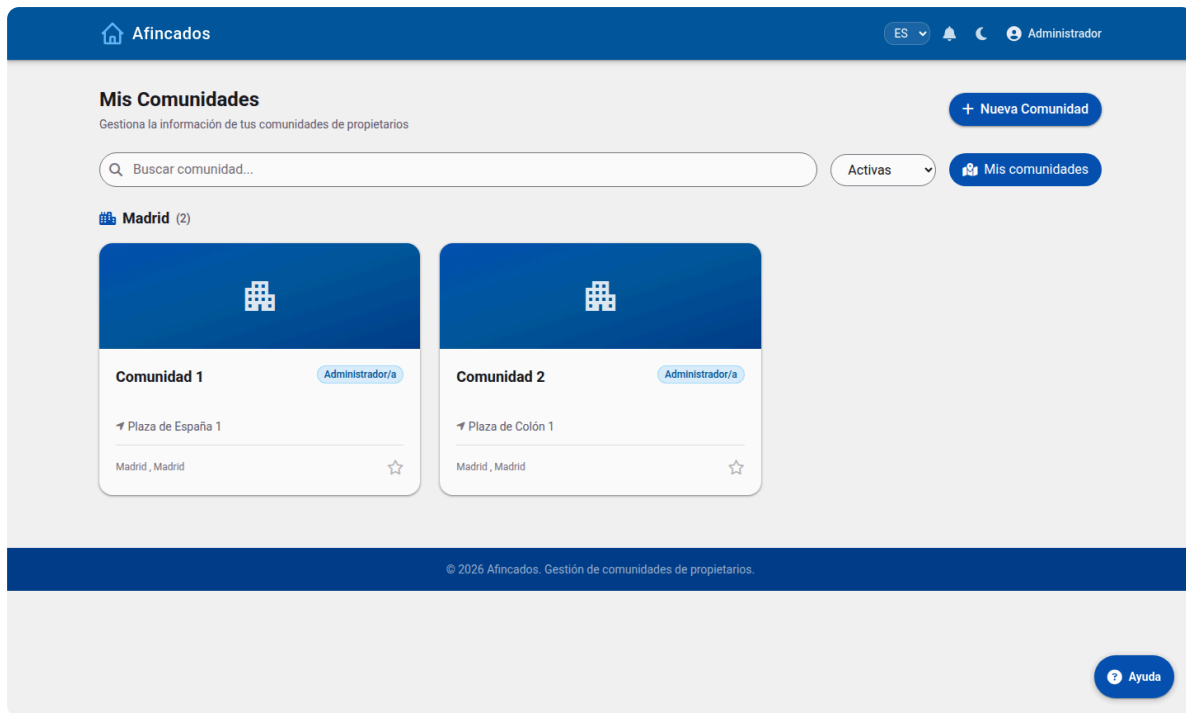
In Afincados, **what you see depends on your profile**. There is no permission screen to configure option by option: each user has a profile within a community, and that profile decides which tabs appear in the menu and which buttons you can press.

The four profiles

- **Property manager:** the role with the most permissions. The only one that creates new communities and the only one that reaches **Tax**, **LPH Advisor**, **Calendar** and **Manager inbox**.
- **President and board:** president, vice-president and board members. They manage almost the whole community — residents, fees, incidents, meetings, documents — but not the tax area or the manager's internal tools.
- **Resident:** owners and tenants. They consult their community's information and take part: report incidents, vote and book facilities. They do not manage.
- **Worker:** staff serving the community on behalf of a supplier (cleaning, maintenance, lifts...). A reduced view focused on their daily work: clocking in, their assigned incidents and their supplier's schedule.

The profile belongs to the community, not to the person

The same person can hold different profiles in different communities: you may be **president** where you live and a **resident** in your holiday flat. That is why each card in **My Communities** shows your role in that particular community.



Each card shows the profile you enter that community with.

When you open a community, the app loads the menu matching your profile *in it*. Switch to a community where you have another role and the menu changes with you.

Why a tab is missing

- **No Tax, LPH Advisor, Calendar or Inbox:** those belong to the property manager only.
- **I cannot create a community:** only the property manager can.
- **I see Finances but no buttons:** residents get a **read-only** view.
- **I only see three sections:** you are signing in as a supplier's worker.

A profile is not unlocked from your own account: the manager or the board assigns it. See [Assigning and changing a user's profile](#).

Keep reading

- [What each profile sees: comparison table](#).
- [Who sees each document and content](#).
- The full walkthrough of every profile in the [Role guides](#).

1.3 What each profile sees: comparison table

Updated on 01/08/2026

Side-by-side comparison of menu tabs and main actions for property manager, board, resident and worker.

Two tables summarise the whole system: which **tabs** each profile gets, and which **actions** each one can perform.

Menu tabs

Tab	Property manager	President / Board	Resident	Worker
Community	Yes	Yes	Yes	No
Building	Yes	Yes	Yes	No
Finances	Yes	Yes	Yes (read-only)	No
Documents	Yes	Yes	Yes (shared folders)	No
Incidents	Yes	Yes	Yes	Yes (only theirs)
Suppliers	Yes	Yes	Yes	Yes (own company)
Passes	Yes	Yes	Yes	No
Announcements	Yes	Yes	Yes (receives them)	No
Votes	Yes	Yes	Yes (votes)	No
My shift	No	No	No	Yes
Tax	Yes	No	No	No
LPH Advisor	Yes	No	No	No
Calendar	Yes	No	No	No
Manager inbox	Yes	No	No	No

Actions

Action	Property manager	President / Board	Resident	Worker
Create communities	Yes	No	No	No
Add users and properties	Yes	Yes	No	No
Edit ownership shares and land registry	Yes	Yes	No	No
Create fees, levies and direct debits	Yes	Yes	No	No
View accounts and transactions	Yes	Yes	Yes (read-only)	No
Report an incident	Yes	Yes	Yes	Yes
Assign and close incidents	Yes	Yes	No	No
Call meetings and publish minutes	Yes	Yes	No	No
Upload documents and set their visibility	Yes	Yes	No	No
Send announcements	Yes	Yes	No	No
Open votes	Yes	Yes	No	No
Vote	Yes	Yes	Yes	No
Staff, payslips and tax forms	Yes	No	No	No
Clock in and out	No	No	No	Yes

The key difference

Between **manager** and **board**, the line is the tax area and the internal tools: Tax, LPH Advisor, Calendar, Inbox and creating communities. Everywhere else the board manages just like the manager.

Between **board** and **resident**, the line is managing versus consulting and taking part: residents see nearly the same screens, without the management actions.

The **worker** sits outside that scale: not a reduced resident but a different view — shift, assigned incidents, own supplier — with no access to finances, documents or other residents' data.

1.4 Who sees each document and content

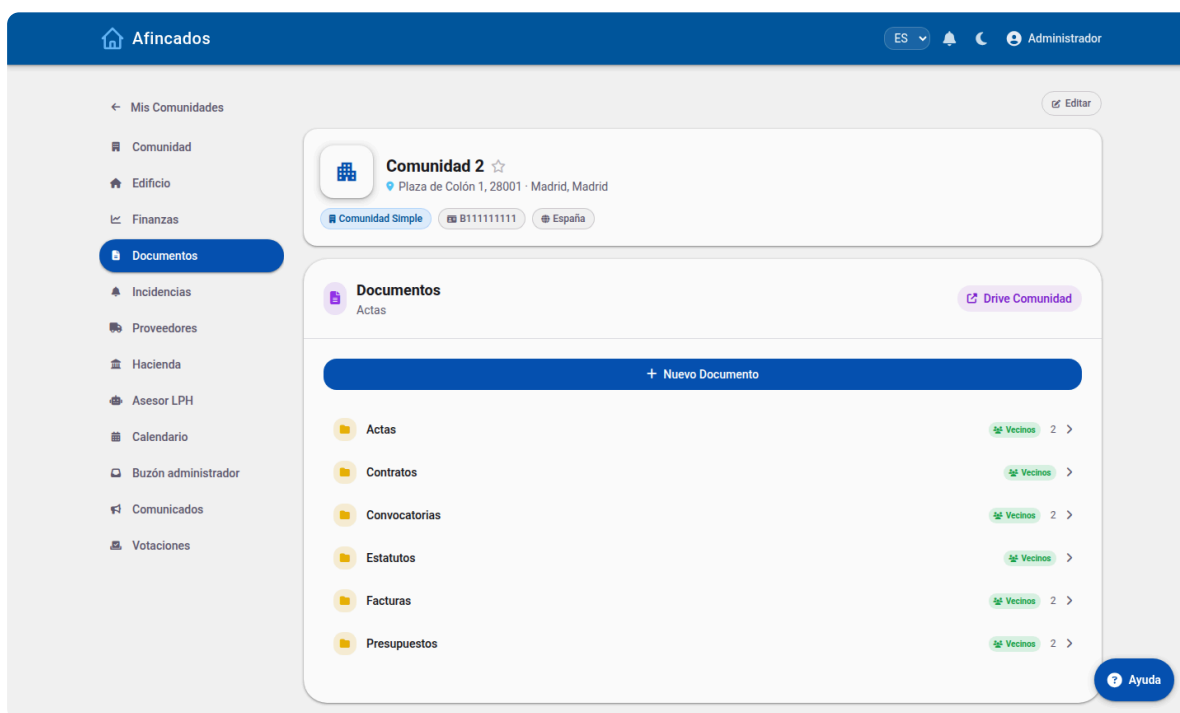
Updated on 01/08/2026

Folders shared with residents, read-only finances, assigned incidents and announcements: what each profile reaches.

Beyond the tabs each profile gets, some content is shared **selectively**. These are the four cases where visibility is decided content by content, not just by profile.

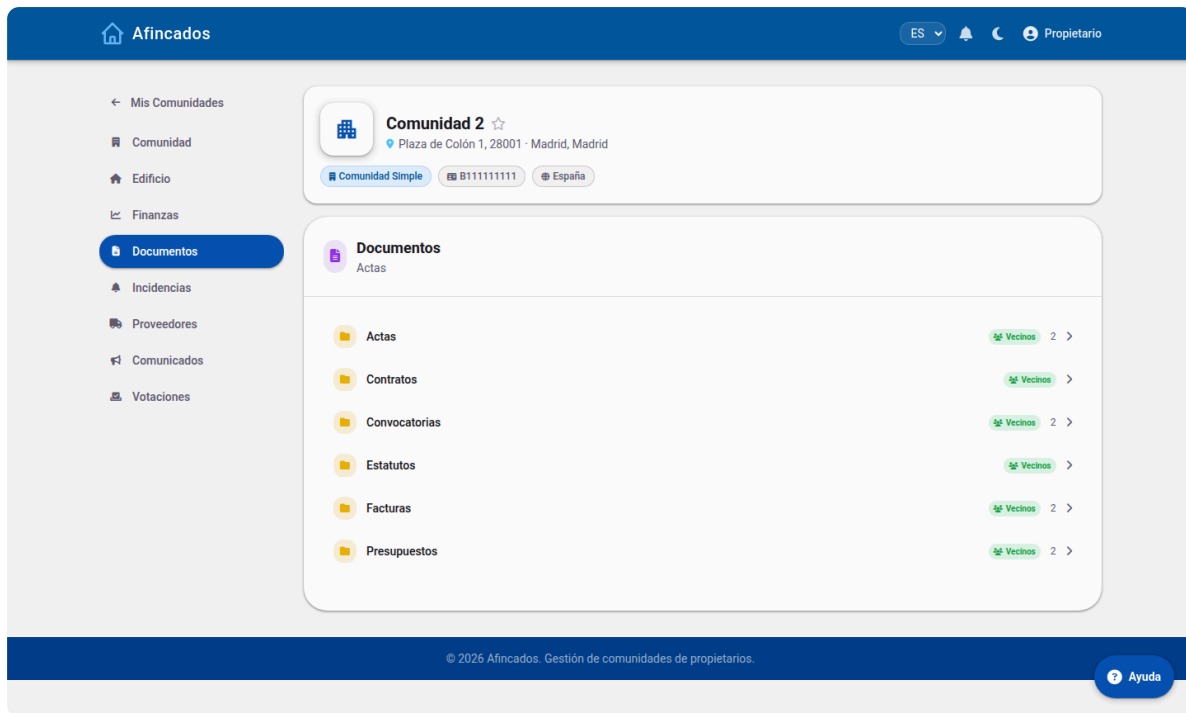
Documents: shared folders

The most important case, because **you decide**. Community folders (minutes, contracts, notices, bylaws, invoices, budgets) are either marked visible to residents or kept for management only. In the list, the **Residents** label marks the shared ones.



Manager view: the «Residents» label marks the shared folders.

Residents only see the shared ones — the rest simply do not appear in their Documents tab.

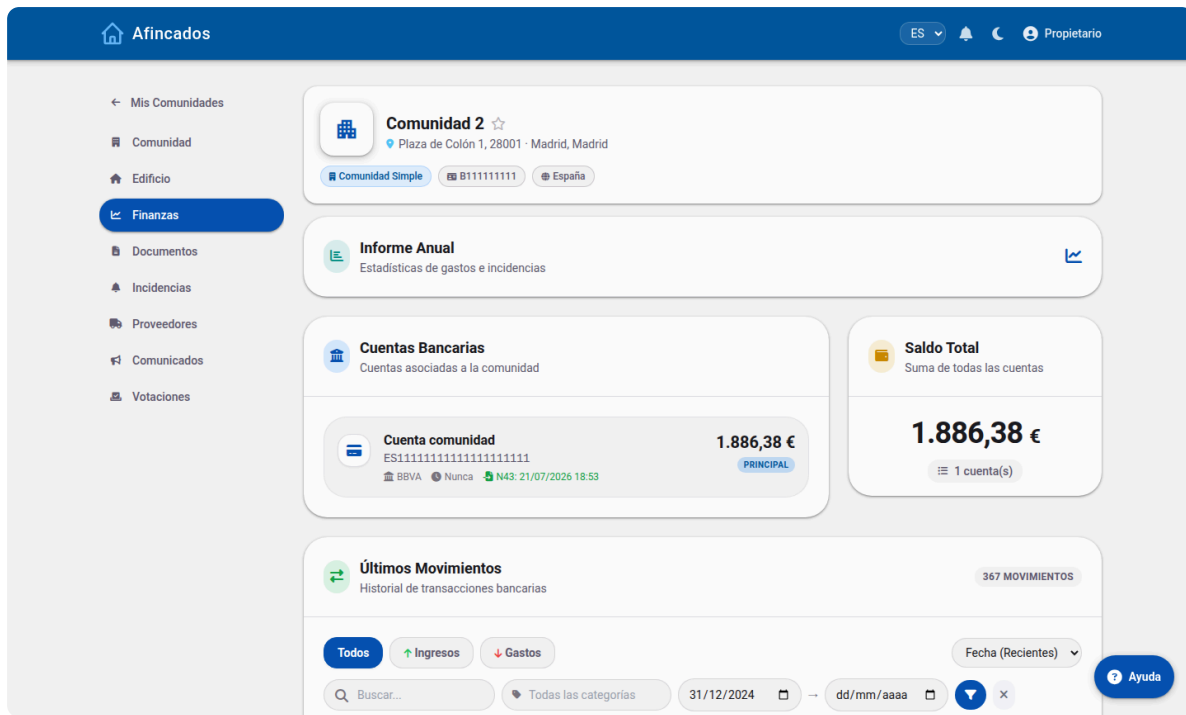


The same community seen by a resident: shared folders only.

This is the natural way to separate what the community should know (minutes, budgets, notices) from internal management work. Check the label before uploading a sensitive document.

Finances: visible, but read-only

Accounts, balance and transactions are **not hidden** from residents: financial transparency is part of how a community runs. What changes is that residents have no management actions — creating fees, direct debits or transactions — only the view.



Residents see balances and transactions; the management buttons are absent.

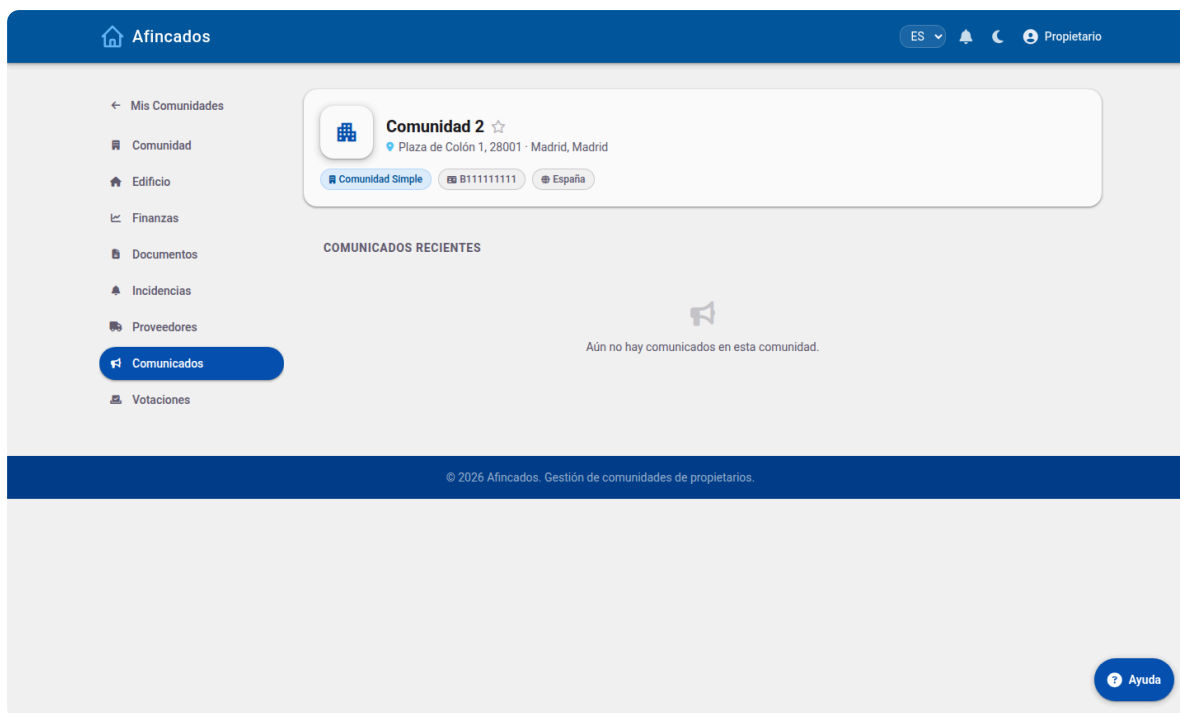
The exception is the **worker**, who has no access to Finances at all.

Incidents: each role sees its own scope

- **Manager and board:** every incident in the community, filtered by status and assignee.
- **Resident:** can report incidents and follow their status.
- **Worker: only the ones assigned to them.** They do not see the community's other incidents.

Announcements and votes: they reach every resident

Announcements are sent by the manager and the board and reach all residents, highlighted when urgent. Votes work the same way: management opens them and owners take part. There is no selective sending to a subset of residents.



Announcement history in the resident's view.

And personal data

The **worker** has no access to other residents' data: their view is limited to their shift, their incidents and their supplier. Every user manages their own data — phone, email, avatar and password — from **My profile**.