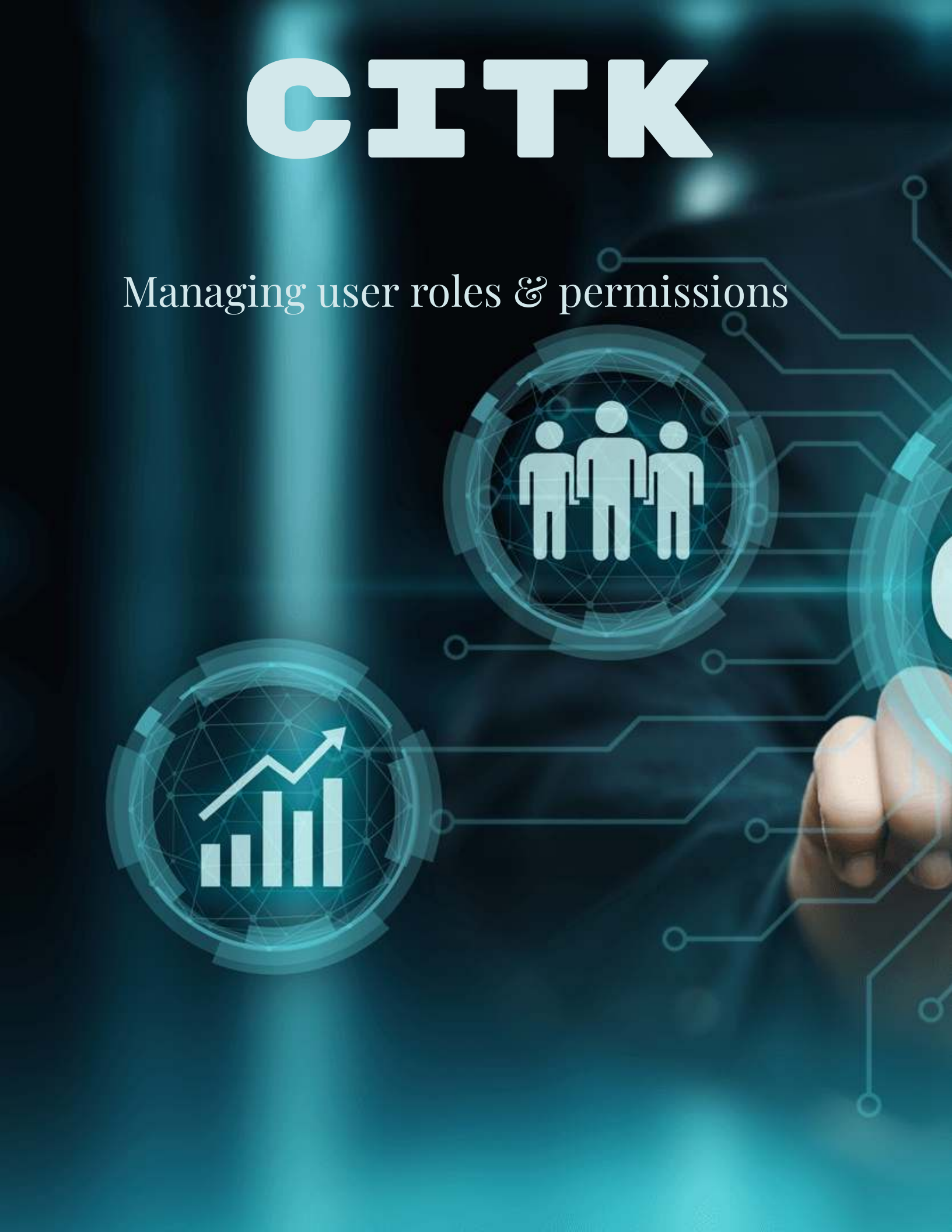
CITK

Managing user roles & permissions



Agency | Managing user roles & permissions Print

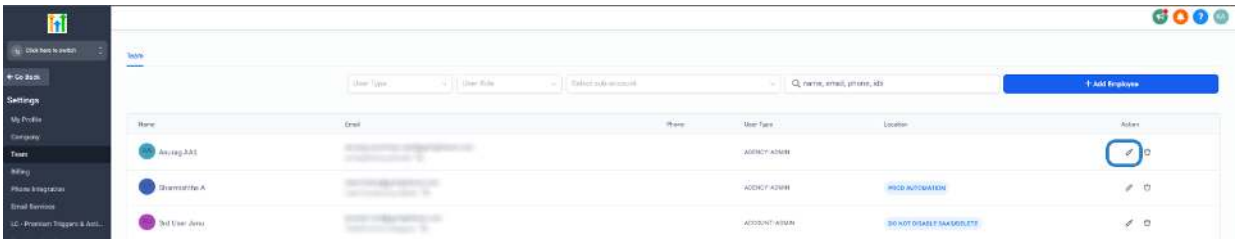
In this article, we discuss how you, as an agency admin, can granularly manage your users' permissions across various modules.

If you are here looking for sub-account's user roles and permission management, click here.

Getting started with user permissions

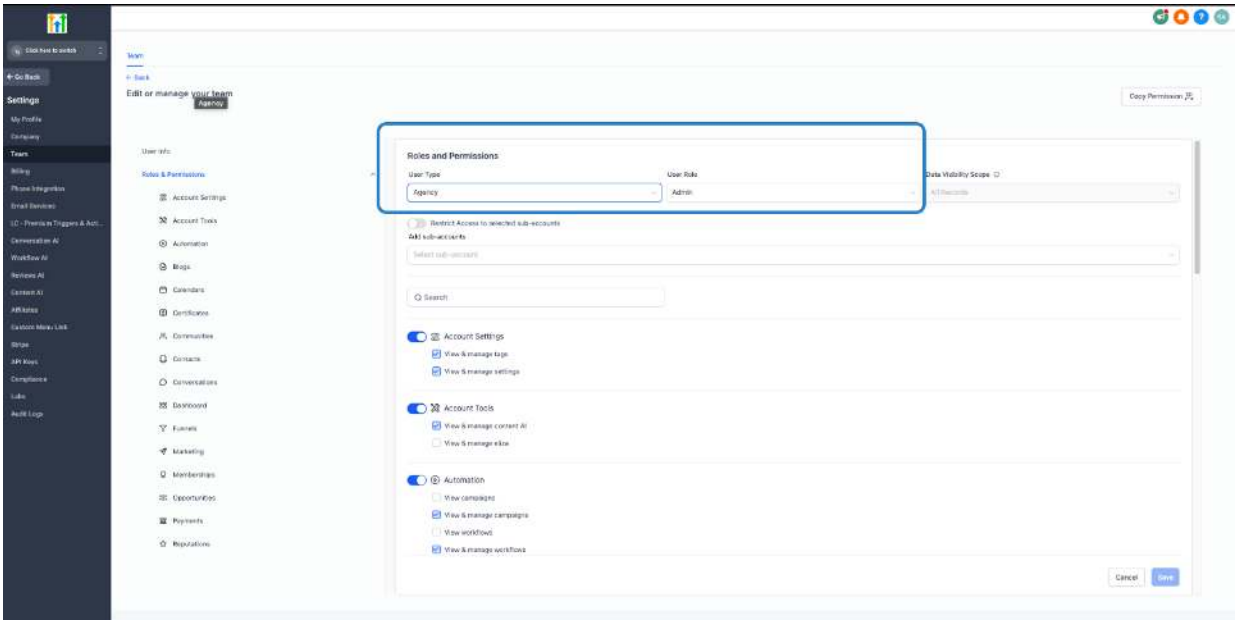
To manage users' permissions for an agency,

- Navigate to Settings > Team.
- Click on the edit icon for the user whose permissions you want to edit.
- Click on 'Roles & Permissions' in the left menu.



Assigning user type and role

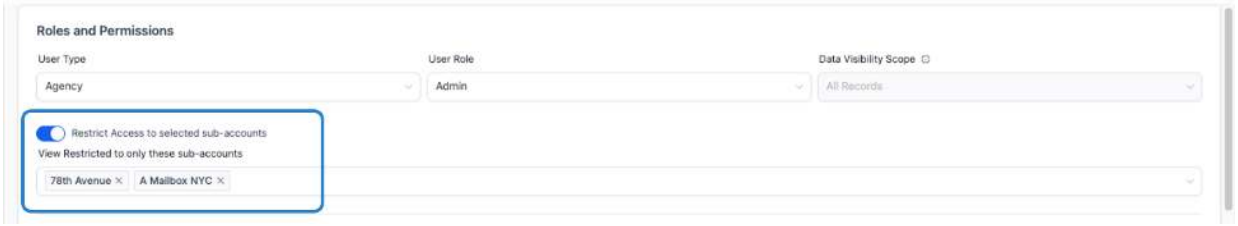
- **User Type**: Select whether you wish to create the user for the agency or a specific sub-account.
- **Role**: Select whether the user is an admin or a user.



Restrict access to specific sub-accounts

Agency admins can assign agency admins to specific sub-accounts and restrict them from accessing other sub-accounts to which they are not assigned.

For example, Alex, who is an agency admin, can access only assigned sub-accounts '78th Avenue' and 'A Mailbox NYC', without compromising his access level. However, he will not be able to access 'Baker's Inn' which he is not assigned to.

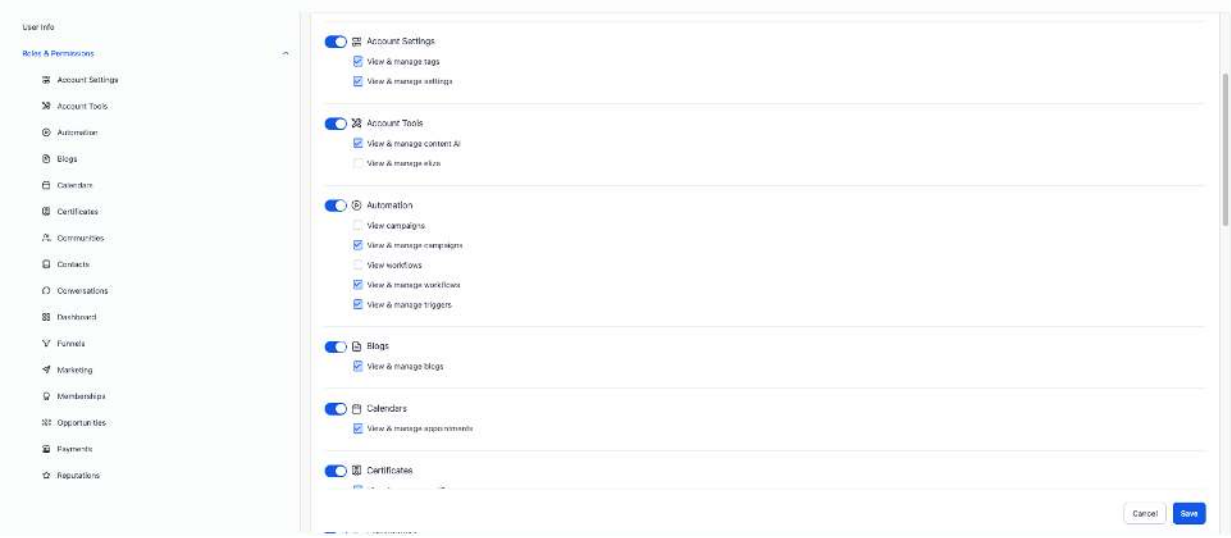


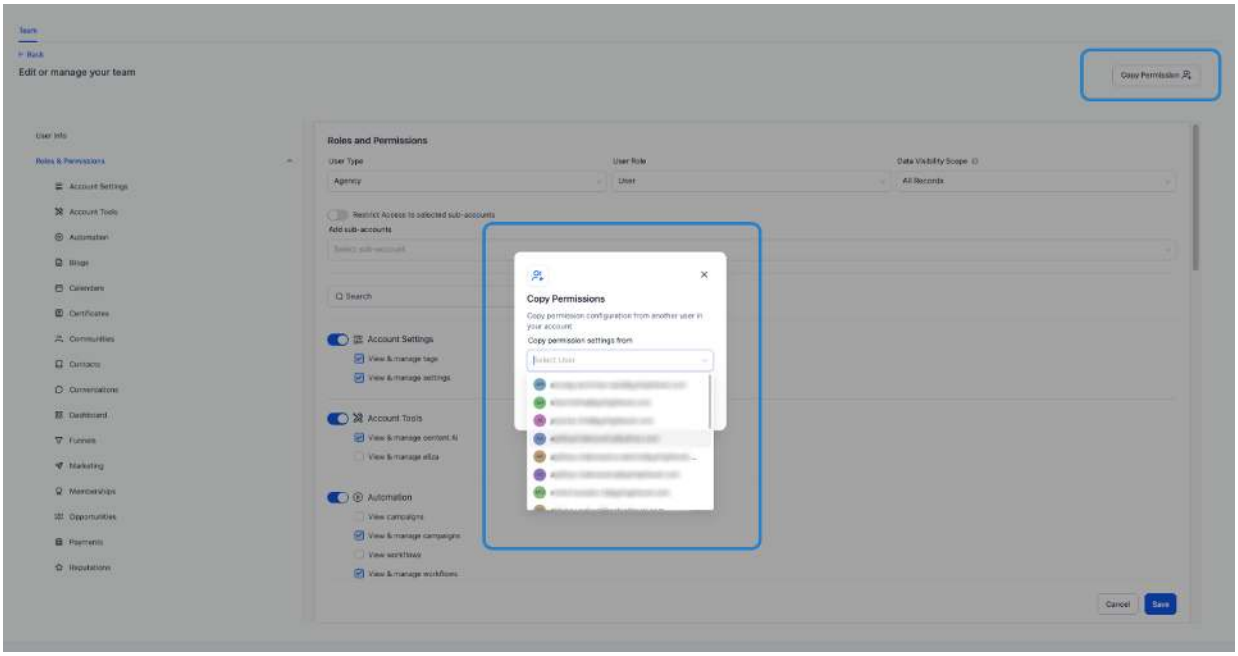
Assign permissions

Agency admins can apply granular permissions to their users. You may control the permissions at two levels:

- **Module: Toggle the module off to completely restrict access to the module.**
- **Granular: Using checboxes, you can set the permissions at a granular level.**

The new permissions structure is backward compatible with the old set of permission structures and their functionalities.



Copy permissions

Agency admins can copy a user's granular permissions to another user. For example, when Bob joins the sales team, the admin can clone Alex's permissions to Bob.