User Roles / Permissons Explained

09/11/2025 3:31 pm CDT

Standard User

Access is limited to modules and features explicitly granted in their profile.

- Cannot manage users or perform administrative tasks.

Designated Admin

- Can manage plans, users, and administrative tasks.
- Must have **"Designated Admin"** set to **"Yes"** in their user profile.

Master User

- Has full access to all modules, administrative tools, and user management features.
- Typically reserved for firm-wide administrators.

⬜ **Permissions Matrix**

Here's a quick comparison of what each role can do:

Action	Standard User	Designated Admin	Master User
Access Modules	✅ (based on profile)	✅	✅
Add/Delete Plans	✅ (if granted)	✅ (if granted)	✅
View Divisions	❌	❌	✅
Access Admin Tasks Page	❌	✅	✅
Manage Users	❌	✅	✅
Update User Passwords	❌	✅	✅
Update Plan Admins	❌	✅	✅
Run Reports	✅ (limited)	✅	✅
Upload Company/Plan Data	❌	✅	✅
Access Account Profile Page	❌	❌	✅
Access Divisions Page	❌	❌	✅

⬜ Tips for Admins

- To grant admin access, set **"Designated Admin"** to **"Yes"** in the user's profile.
- Use the Admin Tasks page to manage users and reset passwords.
- Master Users can access all divisions and account-level settings.