**Role Planning**Documentation & specification for all User Roles and their permission Plan

1. Roles :-
   1. Admin
   2. Manager
   3. Sales Executive
   4. Marketing Agent
   5. Customer support Agent
   6. viewer
2. Role Descriptions:-
   1. **Admin:-**

**Access Level:** Full platform control, system-wide visibility, and configuration rights.

**Modules Accessible:**

* Dashboard (all data & filters)
* Leads (all)
* Deals / Opportunities
* Tasks & Activities
* Campaigns
* Customers
* Geo Insights
* Admin / Settings (User, Team, Role, Integration, Theme)

**Core Functionalities:**

* User Management: Add/edit/delete users, assign roles, reset passwords.
* Team Management: Create/edit/delete teams, assign members.
* Role & Permission Control: Configure access for other roles.
* System Configuration: Email, WhatsApp, LinkedIn API integration.
* Data Oversight: View all leads, deals, campaigns, customer data.
* Analytics & Reports: Full reports export (PDF/CSV).
* Customization: Configure dashboard widgets, themes.
* Security: Enforce password policies, session timeouts.

**Typical Use Cases:**

* Onboarding new team members.
* Creating new roles & defining permissions.
* Monitoring overall business performance.
  1. **Manager:-**

**Access Level**: High-level control over their team and assigned data, no platform-wide settings.

**Modules Accessible:**

 Dashboard (team-filtered data)

 Leads (team)

 Deals / Opportunities (team)

 Tasks & Activities (team)

 Campaigns (team access if Marketing role combined)

 Customers (team)

 Geo Insights (team)

 Limited Admin functions (team-level user assignments)

**Core Functionalities:**

* View team performance metrics.
* Assign leads/deals to team members.
* Approve/review campaigns (if marketing manager).
* Monitor task completion rates.
* Generate team-specific reports.
* Adjust sales pipelines for better conversion.
* View unified inbox for their team.

**Typical Use Cases:**

* Weekly performance review with sales reps.
* Reassigning leads from inactive reps.
* Coordinating between sales and marketing.
  1. **Sales Representative :-**

**Access Level:** Access only to assigned leads, deals, and tasks.

**Modules Accessible:**

* Dashboard (personal data only)
* Leads (assigned only)
* Deals / Opportunities (assigned only)
* Tasks & Activities (assigned only)
* Customers (assigned only)
* Unified Inbox (only their leads)

**Core Functionalities:**

* Add new leads.
* Update lead status in pipeline.
* Log interactions (calls, emails, meetings).
* Move deals through stages.
* Set and complete follow-up tasks.
* View personal sales KPIs.

**Typical Use Cases:**

* Calling new leads and updating notes.
* Moving leads from “Contacted” to “Qualified.”
* Logging meeting outcomes.
  1. **Marketing :-**

**Access Level:** Campaign-focused with access to marketing insights and lead sources.

**Modules Accessible:**

* Dashboard (marketing-related KPIs)
* Leads (read/write access for marketing-generated leads)
* Campaigns (full control)
* Customers (marketing-relevant info)
* Marketing Insights

**Core Functionalities:**

* Create/edit campaigns (Email, WhatsApp, LinkedIn).
* Manage and test templates.
* Track open/click/conversion rates.
* Analyze lead sources for ROI.
* Schedule follow-ups for campaign leads.
* Export lead lists for targeting.

**Typical Use Cases:**

* Running a LinkedIn lead-gen campaign.
* Comparing email template performance.
* Sending out follow-up reminders to campaign leads.
  1. **Support :-**

**Access Level:** Post-sales customer relationship management.

**Modules Accessible:**

* Dashboard (support KPIs)
* Customers (full details)
* Tasks & Activities (support-related)
* Unified Inbox (support queries)
* Retention/Churn analytics

**Core Functionalities:**

* Manage support tickets/issues.
* Update customer lifecycle stages (Active → At Risk → Retained).
* Send follow-up emails for satisfaction checks.
* Record customer complaints & resolutions.
* Collaborate with sales on upsell opportunities.

**Typical Use Cases:**

* Calling customers flagged “At Risk.”
* Closing support tasks after resolution.
* Adding notes from client calls.

* 1. **Viewer :-**

**Access Level:** Read-only.

**Modules Accessible:**

* Dashboard (read-only)
* Leads (read-only)
* Deals / Opportunities (read-only)
* Campaigns (read-only)
* Customers (read-only)
* Geo Insights (read-only)

**Core Functionalities:**

* View all data according to their permission scope.
* Filter and export reports.
* No editing, creation, or deletion rights.

**Typical Use Cases:**

* Executive viewing business KPIs.
* External auditors reviewing CRM usage.