

[illegible]

	PLATFORM		AGENCY		DIRECT CLIENT			LIMITED ACCESS			
Permission / Function	PFI Owner	Admin	Agency Admin	Agency Manager	Agency Analyst	Client Admin (Ent)	Client Manager	Client Analyst	Client Viewer	Affiliate	API Only
<i>Who is this?</i>	<i>BAIV</i>	<i>Super User</i>	<i>Agency running clients</i>	<i>Agency team member</i>	<i>Agency read-only</i>	<i>CMO/VP/Director</i>	<i>Marketing Manager</i>	<i>SEO/Content Specialist</i>	<i>Executive view only</i>	<i>Referral partner</i>	<i>System integration</i>
Create content plans											
Schedule social posts											
Approve scheduled content											
Connect social accounts											
LEAD GENERATION											
Run Hunter.io searches											
View lead lists											
Export leads											
Configure lead scoring											
INTEGRATIONS											
Connect LinkedIn (Unipile)											
Connect Google Drive											
Connect WordPress											
Connect email (Brevo)											
Manage API keys											
View integration status											
PLATFORM APIs											
Access REST API											
Access WebSocket feeds											
Generate API tokens											
View API usage/logs											
AGENCY-SPECIFIC											
Create client tenants											
View all agency clients											
Switch between client views											
White-label reports											
Bulk operations (multi-client)											
ONTOLOGY & ADVANCED											
View ontologies											
Create/edit ontologies											
Manage registry entries											
C-SUITE ROLE MAPPING											
CMO/VP Marketing → maps to	—	—	—	—	—	Client Admin	—	—	—	—	—
Director E-commerce → maps to	—	—	—	—	—	Client Admin	Client Manager	—	—	—	—
Marketing Manager → maps to	—	—	—	—	—	—	Client Manager	—	—	—	—
SEO Manager → maps to	—	—	—	—	—	—	Client Manager	Client Analyst	—	—	—
Content Manager → maps to	—	—	—	—	—	—	Client Manager	Client Analyst	—	—	—

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Paid Media Manager → maps to	—	—	—	—	—	—	Client Manager	—	—	—	—
Social Media Manager → maps to	—	—	—	—	—	—	—	Client Analyst	—	—	—
SEO Specialist → maps to	—	—	—	—	—	—	—	Client Analyst	—	—	—
IT/Technical → maps to	—	—	—	—	—	Client Admin	—	—	—	—	API Only

Permission / Function	
Notes	
Who is this?	
SECURITY & ACCESS	
View own tenant data	Affiliate sees referral data only
View all tenant data (cross-tenant)	Platform level only
Create/edit own data	Analyst=limited, API=scoped
Execute agents	Analyst=view results only
View team members	
Invite users	Manager=same or lower role
Change user roles	
Remove users	
Archive tenant	
Delete tenant	PFI Owner only
Access billing	
ONBOARDING & DISCOVERY	
Complete onboarding wizard	Admin initiates
Run discovery audit	
View discovery results	Affiliate=own referrals
Edit brand profile	
Configure ICP	
DASHBOARDS & REPORTING	
View executive dashboard	Affiliate=referral dashboard
View detailed analytics	Viewer=summary only
Export reports (PDF/CSV)	
Schedule automated reports	
Create custom dashboards	Manager=own views
ANALYSIS TOOLS	
Run citation analysis	
Run competitor analysis	
Run gap analysis	Analyst=view only
Configure analysis parameters	
View Reddit/social monitoring	
CONTENT CREATION	
Generate FAQ content	Analyst=draft only
Generate schema markup	
Generate blog content	
Approve content for publish	
Edit content templates	
CONTENT PLANNING & SCHEDULE	
View content calendar	

Permission / Function		Notes
Who is this?		
Create content plans	Analyst=suggest only	
Schedule social posts		
Approve scheduled content		
Connect social accounts	Admin only	
LEAD GENERATION		
Run Hunter.io searches		
View lead lists		
Export leads	Limited by plan	
Configure lead scoring		
INTEGRATIONS		
Connect LinkedIn (Unipile)		
Connect Google Drive		
Connect WordPress		
Connect email (Brevo)		
Manage API keys		
View integration status		
PLATFORM APIs		
Access REST API	Scoped by role	
Access WebSocket feeds		
Generate API tokens		
View API usage/logs		
AGENCY-SPECIFIC		
Create client tenants	Agency Admin only	
View all agency clients		
Switch between client views		
White-label reports		
Bulk operations (multi-client)		
ONTOLOGY & ADVANCED		
View ontologies		
Create/edit ontologies	Platform level only	
Manage registry entries		
C-SUITE ROLE MAPPING		
CMO/VP Marketing → maps to	Strategic oversight, ROI focus	
Director E-commerce → maps to	Implementation + oversight	
Marketing Manager → maps to	Day-to-day execution	
SEO Manager → maps to	Technical + analysis	
Content Manager → maps to	Content workflow	

Permission / Function	Notes
Who is this?	
Paid Media Manager → maps to	Attribution focus
Social Media Manager → maps to	Monitoring + engagement
SEO Specialist → maps to	Technical implementation
IT/Technical → maps to	Integration focus