



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	
Who is this?	BAIV	Super User	Agency running clients	Agency team member	Agency read-only	CMO/VP/Director	Marketing Manager	SEO/Content Specialist	Executive view only	Referral partner	System integration	
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	—	—	—	

PLATFORM			AGENCY			DIRECT CLIENT				LIMITED ACCESS		
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Who is this?	BAIV	Super User	Agency running clients	Agency team member	Agency read-only	CMO/VP/Director	Marketing Manager	SEO/Content Specialist	Executive view only	Referral partner	System integration	
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
<i>Who is this?</i>	
<b>SECURITY &amp; ACCESS</b>	
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	
<b>ONBOARDING &amp; DISCOVERY</b>	
Complete onboarding wizard	Admin initiates
Run discovery audit	
View discovery results	Affiliate=own referrals
Edit brand profile	
Configure ICP	
<b>DASHBOARDS &amp; REPORTING</b>	
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
<b>ANALYSIS TOOLS</b>	
Run citation analysis	
Run competitor analysis	
Run gap analysis	Analyst=view only
Configure analysis parameters	
View Reddit/social monitoring	
<b>CONTENT CREATION</b>	
Generate FAQ content	Analyst=draft only
Generate schema markup	
Generate blog content	
Approve content for publish	
Edit content templates	
<b>CONTENT PLANNING &amp; SCHEDULE</b>	
View content calendar	

Permission / Function	Notes
<i>Who is this?</i>	
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	
<b>AGENCY-SPECIFIC</b>	
Create client tenants	Agency Admin only
View all agency clients	
Switch between client views	
White-label reports	
Bulk operations (multi-client)	
<b>ONTOLOGY &amp; ADVANCED</b>	
View ontologies	
Create/edit ontologies	Platform level only
Manage registry entries	
<b>C-SUITE ROLE MAPPING</b>	
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
<i>Who is this?</i>	
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