

	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	Notes	
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		
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													
Create content plans												Analyst=suggest only	
Schedule social posts													
Approve scheduled content													
Connect social accounts												Admin only	
LEAD GENERATION													

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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	—	—	—	—	—	Client Admin	—	—	—	—	—		Strategic oversight, ROI focus
Director E-commerce → maps to	—	—	—	—	—	Client Admin	Client Manager	—	—	—	—		Implementation + oversight
Marketing Manager → maps to	—	—	—	—	—	—	Client Manager	—	—	—	—		Day-to-day execution
SEO Manager → maps to	—	—	—	—	—	—	Client Manager	Client Analyst	—	—	—		Technical + analysis
Content Manager → maps to	—	—	—	—	—	—	Client Manager	Client Analyst	—	—	—		Content workflow
Paid Media Manager → maps to	—	—	—	—	—	—	Client Manager	Client Analyst	—	—	—		Attribution focus
Social Media Manager → maps to	—	—	—	—	—	—	—	Client Analyst	—	—	—		Monitoring + engagement
SEO Specialist → maps to	—	—	—	—	—	—	—	Client Analyst	—	—	—		Technical implementation
IT/Technical → maps to	—	—	—	—	—	Client Admin	—	—	—	—	API Only		Integration focus