

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	—	—	—	—	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