Permission Matrix

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

Legend for colored cells: ✓ = green · ✗ = red · ◐ = yellow · (blank) = white/no cell value

Permission / Function	PLATFORM		AGENCY			DIRECT CLIENT			LIMITED ACCESS			Notes
	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	
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