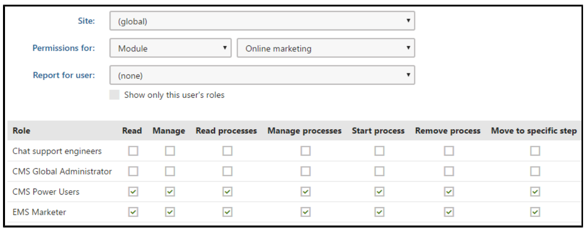
You can control access to on-line marketing features through:

- Permissions
- UI personalization

The system only allows users to perform on-line marketing actions if they belong to roles with permissions for individual on-line marketing modules.

1. Create global on-line marketing roles.
2. Configure the permissions of the global roles.
3. Assign individual users to the appropriate roles.

You can configure module permissions for roles in the **Permissions** application.



On-line marketing

You can set the following permissions for the **On-line marketing** module.

Permission	Description
Read	Allows members of the selected roles to view data in some of the *On-line marketing* application categories.
Manage	Allows members of the selected roles to manage the data in some of the *On-line marketing* application categories.

Parts of the system where these permissions apply (along with their UI):

- *Marketing overview* application
- Activities
  - *Contact management* application -> editing a contact -> *Activities* tab
  - *Contact management* application -> *Activity log* tab
  - *Contact management* application -> *Configuration* -> *Macro rules* tab

  Note

  The **Contact management -> Configuration -> Activity types** tab is accessible only to users with the global administrator privilege level.

  To access these applications and tabs, you also need the **Read** and **Read configuration** Contact management permissions.

- Parts of marketing automation
  - *Contact management* application -> editing a contact -> *Processes* tab

  To access this application and tab, you also need the **Read** Contact management permission and the **R ead processes** Marketing automation permission.

- Parts of contact management

- *Contact management* application -> *Pending contacts* tab
- *Contact management* application -> *On-line users* tab
- *My pending contacts* application

> To access these applications and tabs, you also need the **Read** Contact management permission.

Activities

Configure the permissions for activity log through the **Activities** module.

Permission	Description
Read activities	Allows members of the selected roles to view activities in the activity log.
Modify activities	Allows members of the selected roles to edit or delete activities in the activity log.

Banners

Configure the permissions for Banners through the **Banner management** module.

Permission	Description
Read	Allows members of the selected roles to view banners and their categories on a specific site.
Modify	Allows members of the selected roles to create, edit or delete banners and their categories on a specific site.
Global read	Allows members of the selected roles to view global banners and their global categories.
Global modify	Allows members of the selected roles to create, edit or delete global banners and their global categories.

Contact management

You can configure four basic types of permissions for the **Contact management** module.

Permission	Description
Read	Allows members of the selected roles to view contacts, contact groups, and contact accounts.
Modify	Allows members of the selected roles to create, edit and delete contacts, contact groups, and contact accounts.
Read configuration	Allows members of the selected roles to view account statuses, contact statuses, and contact roles.
Modify configuration	Allows members of the selected roles to create, edit and delete account statuses, contact statuses, and contact roles.

Scoring

Configure the permissions for Contact scoring through the **Scoring** module.

Permission	Description

Read	Allows members of the selected roles to view the settings of scores and their rules, as well as the score points of individual contacts.
Manage	Allows members of the selected roles to create, edit and delete scores and their rules. Also authorizes users to recalculate scores.

Content personalization

Configure the permissions for Content personalization through the **Content personalization** module.

Permission	Description
Read	Allows members of the selected roles to view the following in the **Pages** application administration interface: • The content of personalization variants • The properties of personalization variants • Variant lists No special permissions are required to view personalized content on the live site.
Manage	Allows members of the selected roles to create, edit and delete personalization variants of objects. **Note**: For websites that use both content personalization and workflow, define editor roles without the **Content personalization -> Manage** permission if you wish to strictly enforce the workflow publishing process. Personalization variants of editor widgets are not included within the scope of workflow, so changes can have an immediate effect on the live website.

Note

Users need the **Design website** permission for the **Design** module to manage the variants of web parts and zones on the **Design** tab of the **Pages** application.

To work with variants of editor widgets on the **Pages** application **Page** tab, the **Modify** permission for the **Content** module is required. The security settings of specific widgets also apply.

Email marketing

Configure the permissions for Email marketing actions through the **Email marketing** module.

Permission	Description
Read	Allows members of the selected roles to view all data in the *Email marketing* application interface.
Destroy	Allows members of the selected roles to delete the version history of newsletter and email campaign objects.
Configure email feeds	Allows members of the selected roles to configure the settings of all newsletters and email campaigns on the site.
Author marketing emails	Allows members of the selected roles to create and edit marketing emails within newsletters and email campaigns.
Manage recipients	Allows members of the selected roles to add and remove email feed recipients (contacts and contact groups).
Manage templates and widgets	Allows members of the selected roles to create, edit and delete email feed templates and widgets.

Marketing automation

Configure the permissions for Marketing automation through the **On-line marketing** module.

Permission	Description
Read processes	Allows members of the selected roles to view automation processes.
Manage processes	Allows members of the selected roles to: • Create, configure and delete automation processes • Design the steps of automation processes • Move contacts within any process to the previous and next step (regardless of step security settings) ◦ **Important**: Automation processes run within a global context in certain scenarios. To allow moving of contacts from steps in all cases, you need to assign the permission via a **Global** role.
Start process	Allows members of the selected roles to start automation processes for contacts and contact groups.
Remove process	Allows members of the selected roles to cancel instances of automation processes running for contacts.
Move to specific step	Allows members of the selected roles to move contacts to any step within automation processes (regardless of step security settings). **Important**: Automation processes run within a global context in certain scenarios. To allow moving of contacts from steps in all cases, you need to assign the permission via a **Global** role.

Note: Users need the **Read** permission for the **Contact management** module to be able to view and manage instances of automation processes running for contacts.

A/B and MVT testing

Configure the permissions for optimization testing through the **A/B testing** and **MVT testing** modules.

Permission	Description
Read	Allows members of the selected roles to view all parts of the A/B or MVT testing management interface and the corresponding reports.
Manage	Allows members of the selected roles to: • Create, edit and delete tests • Manage test variants (page variants for A/B tests; web part, zone and widget variants for MVT tests) **Note**: For websites that use both MVT testing and workflows, define editor roles without the **MVT testing -> Manage** permission if you wish to strictly enforce the workflow publishing process. Variants of editor widgets are not included by workflow scopes, so even unapproved changes can be directly visible on the live website.

Editing A/B testing page variants:

- Because every A/B testing page variant is represented by a page in the content tree, the standard page permissions apply. The system checks all permissions configured for the **Content** module (creating, modifying and deleting pages).
- Users need the **Design website** permission for the **Design** module to edit page variants on the **Design** tab of the **Pages** a pplication.

Managing MVT object variants:

- Users need the **Design website** permission for the **Design** module to manage the variants of web parts and zones on the **Design** tab of the **Pages** application.
- To work with variants of editor widgets on the **Pages** application **Page** tab, the **Modify** permission for the **Content** module is required. The security settings of specific widgets also apply.

Note: Users need permissions for the Web analytics module to be able to access A/B and MVT testing reports.

Personas

Configure the permissions for Personas through the **Personas** module.

Permission	Description
Read	Allows members of the selected roles to view the content of the **Personas** application. To view the content of personalization variants, members of the selected roles need Content personalization permissions. No special permissions are required to view personalized content on the live site.
Modify	Allows members of the selected roles to create, edit and delete personas in the **Personas** application. **Note** that to be able to tag pages with personas in the **Pages** application, members of the selected roles need the **Browse tree**, **Read** and **Modify Content** permissions.

Note

Users need the **Design website** permission for the **Design** module to manage the variants of web parts and zones on the **Design** tab of the **Pages** application.

To work with variants of editor widgets on the **Pages** application **Page** tab, the **Modify** permission for the **Content** module is required. The security settings of specific widgets also apply.

Web analytics

Configure the permissions for Web analytics (including conversion and campaign management) through the **Web analytics** module.

Permission	Description
Read	Allows members of the selected roles to view web analytics reports in the Web analytics application. Users also need the Read permission to access the analytics reports anywhere else in the UI, for example in *Pages -> Reports*.
Save reports	Allows members of the selected roles to save web analytics reports. The saved reports can be viewed in the *Reporting* application.
Manage data	Allows members of the selected roles to manage the data logged for various statistics (i.e. delete or generate sample data for statistics).
Manage campaigns	Allows members of the selected roles to create and delete campaign tracking objects and edit their properties, including goals.

Manage conversions	Allows members of the selected roles to create, edit and delete conversions.