

## Apply persona-based user roles that fit your organization's business requirements.

The **Roles** tab with the Platform Admin includes settings for each role within your tenant, which is used to determine the permissions that apply to a user's profile. You may also add custom roles.

### System Roles

The system provides several roles that you can assign to users or copy from in order to create your own. These roles are available for every tenant: **Admin** and **User**.

<b>User</b>
Read ability for all modules.
<b>Admin</b>
Read/Write ability for all modules.

You can create custom roles as needed. For example, if you do not want a user to see the Reports tab, you can create a custom "User" role with the View permission disabled under that module.

### Adding Roles

You can add new roles by copying from another role or starting from scratch.

To add a role:

1. From the top right corner of the platform, click **Settings** .
2. From the left navigation, click **Roles**.
3. Either click **Save As New** from an existing role, or click **Add Role**.
4. Enter the following details for the role:
  - **Name:** Enter a name for the role as it appears in the Admin toolset.
  - **External ID:** Optionally add an ID that may be present in another system to help identify the role.
  - **Managed Roles:** Allow users with this role to assign other roles to other users. This settings is designed for users who have permissions to add/edit other user profile. Once enabled, select the roles allowed to be managed by this role. For each of the managed roles selected here, make sure the Managed Roles setting is Off. [Learn more here](#).
  - **Description:** Enter a description for the role as it appears in the Admin toolset.

- **Permissions:** Choose the permissions enabled for each module. Permissions options are grouped by “View” (read), “Edit” (update), “Add” (create), “Delete”, and “Other”. To select/unselect all boxes within a column, click the All | None column headers.

5. Click **Save**.

You can also add notifications to a role that will apply to all users assigned to the role.