Roles and permissions

Overview

A role is a set of permissions. A person can have several roles and receives the combined permissions of all of them. Manage roles under Admin > Roles, which requires the "Manage team members" permission.

Built-in roles

Built-in roles can't be edited or deleted, but you can duplicate them.

Role	Default permissions
Viewer	Read my and all conversations and insights; read all CRM data; read team labels and team topic models; download and share conversations; read tracker issues; manage my prompts.
Creator	Everything in Viewer, plus manage all conversations and insights; upload conversations; manage all prompts; manage my labels and team labels; apply labels; manage my and all topic models; publish tracker issues; manage my and all workflows.
Admin	Manage team members; manage connections; manage company; read pending conversations; manage group labels and group topic models. Admin doesn’t include Viewer or Creator permissions, so admins are normally given those roles as well.

Your Alchemer Voice plan includes a set number of Creator seats. To add more, contact your Alchemer account representative.

Permissions

Conversations

Permission	Allows
Read my conversations	Conversations the person took part in.
Read group conversations	Conversations where someone in one of their groups took part.
Read all conversations	All conversations.

Permission	Allows
Manage all conversations	Read and modify all conversations and conversation fragments.
Upload new conversations	Upload conversations and manage drafts.
Read pending conversations	See conversations waiting for administrative conditions to be met.
Download conversations	Download media.
Share conversations	Share with external participants.
Unredact financial PII, document PII, contact PII	Reveal redacted details of that type in a conversation (three separate permissions). See PII redaction and unredacting.

Administration

Permission	Allows
Manage team members	Invite people and change their access and details. Also gives access to the Team, Groups, and Roles tabs.
Manage connections	Connect external services and manage their configuration.
Manage company	Edit the company description and internal email domains.

Insights, CRM, and labels

Permission	Allows
Read my / group / all insights	Insights from conversations in that scope.
Manage all insights	Modify insights for all conversations.
Read my CRM data	Records they own.
Read group CRM data, Read all CRM data	CRM records in that scope.
Manage my labels, Manage group labels, Read group labels	Own labels, and labels owned by people in their groups.
Manage team labels, Read team labels	Create and edit team labels and their team visibility; read team labels.
Apply labels	Apply labels to content.

Topics, prompts, tracker, and workflows

Permission	Allows
Manage my topic models	Create and edit their own topic sets.
Read group topic models, Manage group topic models	Topic sets owned by people in their groups.
Read team topic models	Topic sets shared with the team.
Manage all topic models	Create and edit all topic sets and their team visibility.
Manage my prompts, Manage all prompts	Manage their own prompts, or all prompts.
Read tracker issues	View tracker issues.
Publish tracker issues	Publish issues to the source service.
Manage my workflows, Manage all workflows	Manage their own workflows, or all workflows.

A permission for a wider scope (for example "Read all conversations") already covers the narrower ones, so tick only what a role needs. To limit people to their group, use the group permissions instead of the "all" ones (see Groups).

Create, duplicate, edit, and delete roles

- **Create:** Select Create role in Admin > Roles, give it a unique title, and tick the permissions.
- **Duplicate:** Open any role, including a built-in one, and select Duplicate (also available from the list). A copy named "Copy of ..." is created with the same permissions.
- **Edit:** Open a custom role, change it, and select Save. Changes apply to everyone with the role.
- **Delete:** Open a custom role, select Delete, and confirm. Delete is disabled while anyone still has the role; remove it from those team members first.

Assign roles

Open a person from Admin > Team, or use Invite user for a new person, and tick roles under User roles. You can't change your own roles. To invite someone new, see User Management.

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