

Admin roles and permissions

Each role in Cloudmore comes with certain permissions allowing a user to do specific tasks. Everyone who works in the Cloudmore platform must be assigned a role.

The following table explains what each role can do in the Cloudmore Platform. When thinking about how you want to assign roles, consider the work a user does in your organization.

For an overview of how to set up administrators and assign roles read [How to add administrators](#)

| Role in Cloudmore | What they can do |
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| Reseller Admin | This is a super admin role, allowing the user to view everything in the platform with full administration rights. |
| Reseller View Only Admin | This role allows the user to view everything in the platform only, with no administration rights. |
| Reseller Billing Admin | <p>This is a restricted role allowing the user to only administer the billing areas of the platform at Service Provider level.</p> <p>The user can:</p> <ul style="list-style-type: none">✓ view and export billing reports at Service Provider level✓ view and edit pricelists✓ view reports✓ view Cloudmore invoices <p>The user cannot:</p> <ul style="list-style-type: none">✗ access individual organisation reports |
| Key Account Manager | This role is intended for sales and support staff who are responsible for a subset of customers. This role provides full access at Organization level to assigned organisation records only. |

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| | <p>The user can:</p> <ul style="list-style-type: none"> ✓ carry out subscription adds, moves and changes on behalf of customers ✓ configure approvals process settings ✓ create and send quotes ✓ view and edit pricelists ✓ view reports ✓ view and export billing reports at org level <p>The user cannot:</p> <ul style="list-style-type: none"> ✗ View unassigned org records ✗ Access Service provider platform level |
| Limited Key Account Manager | This role has the same permissions as the Key account manager role except that it is restricted so that users cannot configure approvals process settings |
| Sales Agent | <p>This role is designed to enable you to provide access at broker level to affiliates outside of your company so that they can manage multiple organisations in Cloudmore.</p> <p>The Sales Agent role is similar to the Key Account Manager role. You can, assign organization groups to a specific admin or admins. The big difference with the sales agent role is that the admin can't see any cost prices or margins. Only the sales price is visible to the admin in the pricelist and on subscription selection screens. The sales agent also has access to a billing report where they can view the billing details for all of their assigned organisations, but again, only the sales price is displayed.</p> |

