User Permissions - Marketing

The marketing permissions determine how a user can interact with the campaign builder, broadcast emails, lead sources and the legacy marketing features.

Campaign (Legacy)

These permissions controls the ability to view, add, edit, & delete a legacy marketing Campaign. If you do not already have legacy campaigns created, then we recommend you set all of these permissions to *No* and use the new campaign builder instead.

- **Can edit all records**: This permission controls the ability to edit existing legacy campaigns. If it is set to *No*, the user can view a list of legacy campaigns **Marketing > Legacy > View Campaigns**, but will see an *access denied* message if they try to click on a campaign link to view or edit the campaign details.
- **Can add**: This permission controls the ability to create a new legacy campaign. If it is set to *No*, the user will not see the option to *Add a Campaign (Legacy)* in the *Legacy* menu or the *Add a Campaign* button when viewing a list of legacy campaigns.
- **Can search**: This permission controls the ability to view a list of legacy campaigns. If it is set to *No*, the user will be able to add a new campaign, but won't be able to view it after it is created. The option to *View Campaigns* will not show up in the Legacy menu.
- **Can delete**: This permission controls the ability to delete legacy campaigns. If it is set to *No*, the user will not see the option to *Delete Campaigns* in the *Actions* drop down menu.

Email

These permissions control the ability to send batch emails to lists of contacts.

Can send broadcasts: This permission controls the ability to send Broadcast messages (email, voice broadcasts, letters, etc.) If it is set to *No*, the user will not see the *Broadcast* option in the main navigation menu. You should make sure you train users on email marketing best practices before setting these permissions to *Yes*.

Follow-Up Sequences (legacy)

These permissions control a user's ability to view, add, edit & delete legacy Follow-Up

Sequences.

- **Can view all records**: This permission controls the ability to view the follow-up sequence details. If it is set to *No*, the user can view the list of follow-up sequences, but will receive an *access denied* message when they click on a link to view the sequence details. They will not be able to view or edit existing legacy follow-up sequences; however, if the *Can add permission* is set to *Yes*, they will still be able to add new legacy follow-up sequences.
- **Can edit all records**: This permission controls the ability to add or edit follow-up sequence steps. If it is set to *No*, the user is able to view the list of sequences and view the sequence details, but when viewing the sequence will not see the drop-down menu for adding new steps or links to edit existing steps.
- **Can add**: This permission controls the ability to add new legacy follow-up sequences. If it is set to *No*, the user will not see the option to *Add* or *Copy* a Follow-up Sequence in the Legacy menu or the *Add a Follow-up Sequence* button when viewing the follow-up sequence list.
- **Can search**: This permission controls the ability to view a list of existing follow-up sequences. If it is set to *No*, the user will not see the option to *View Follow-up Sequences* in the Legacy menu.
- **Can delete**: This permission controls the ability to delete follow-up sequences. If it is set to *No*, the user will not see the *Delete* option in the *Actions* menu drop down when viewing a list of follow-up sequences or the *Delete* button under the *Options* tab when viewing an individual sequence.
- **Can add/remove from follow-up sequence**: This permission controls the ability to manage follow-up sequences for individual contacts. If it is set to *No*, the user will not see the *Follow-up Sequence* tab in the second row of tabs in a contact record or the *Start/Stop a Follow-up Sequence* option in the *Actions* drop down menu when viewing list of contacts.
- **Can override follow-up sequence response defaults**: This permission controls the ability to add a contact to a new follow-up sequence when manually tracking a response in a contact record.

Campaign

These permissions control the ability to use the Campaign Builder.

- **Can edit all records**: This permission controls the ability to edit existing campaigns. If it is set to *No*, the user is able to view the list of campaigns, but will receive an *access denied* message when they click on a link to view campaign details and when they try to add a new campaign.

- **Can add**: This permission controls the ability to add new campaigns using the campaign builder. If it is set to *No*, the user will not see the option to *Add a Campaign* in the Campaign Builder menu or the *Add a Campaign* button when viewing a list of existing campaigns. The user will be able to edit existing campaigns.
- **Can search**: This permission controls the ability to view existing campaigns. If it is set to *No*, the user will not see the option to *View Campaigns* in the Campaign Builder menu. If the *Can add permission* is set to *Yes*, the user is still able to add campaigns, but will not be able to navigate back to them after leaving the campaign builder.
- **Can delete**: This permission controls the ability to delete campaigns. If it is set to *No*, the user will not see the option to *Un-publish and Delete* in the *Actions* drop down menu when viewing a list of campaigns.
- **Can add/remove from campaign**: This permission controls the ability to manage campaign sequences for a list of contacts. If it is set to *No*, the user will not see the option to *Start / Stop a Campaign Sequence* in the *Actions* drop down menu when viewing a list of contacts and will not have access to the *Campaigns* tab when viewing a contact record.

Lead Source

These permissions control the ability to view, add, edit, & delete Lead Sources. Lead sources are used to track advertising efforts and their ability to generate qualified prospects.

- **Can view all records**: This permission controls access to Lead Source records under *Marketing Settings*. If it is set to *No*, the user is able to view a list of lead sources, but receives an *access denied* message when they click on a link to view a lead source's details.
- **Can edit all records**: This permission controls the ability to change a lead source. If it is set to *No*, the user is able to click into individual lead sources and view the details, but will not see the *Save* button and so cannot edit the lead source details.
- **Can add**: This permission controls the ability to add a new lead source. If it is set to *No*, the user will not see the *Add a Lead Source* button when viewing a list of lead sources. If the *Can edit all records* permission is set to *Yes*, the user will still be able to view and edit existing lead sources.
- **Can search**: This permission controls the ability to view existing lead sources. If it is set to *No*, the user will receive an *access denied* message when they click on *Lead Sources* in the marketing settings menu. The user is not able to add, view, or edit lead sources if this permission is set to *No*.

- **Can delete**: This permission controls the ability to delete lead sources. If it is set to *No*, the user will not see the *Set as Active* or *Set as Inactive* options in the *Actions* drop down menu when viewing the lead source list or the *Delete* button when viewing an individual lead source.

Web Form (legacy)

These permissions control the ability to view, add, edit, & delete legacy Web Forms. The Web Forms are used to add new contacts and/or update existing ones. These permissions do not apply to the web forms created through the campaign builder.

- **Can view all records**: This permission controls the ability to view individual web forms. If it is set to *No*, the user can view the list of legacy web forms, but will receive an *access denied* message when they click on a link to view an individual form. They will not be able to view or edit existing legacy web forms; however, if the *Can add permission* is set to *Yes*, they will still be able to add a new legacy form.
- **Can edit all records**: This permission controls the ability to modify the form fields on a legacy web form or change the thank-you page settings. If it is set to *No*, the user is able to view the list of legacy forms and click into an individual web form; however, they will not see the *Edit Web Form* or *Save* buttons. The user will still be able to add actions to the form, but won't be able to save any other changes.
- **Can add**: This permission controls the ability to add new legacy web forms. If it is set to *No*, the user will not see the option to *Add a Web Form* in the Legacy menu or the *Add a Web Form* button when viewing the legacy web form list.
- **Can search**: This permission controls the ability to view web forms. If it is set to *No*, the user will not see the option to *View Web Forms* in the Legacy menu. If the *Can add permission* is set to *Yes*, the user is still able to add legacy web forms, but will not be able to navigate back to them after leaving the page.
- **Can delete**: This permission controls the ability to delete web forms. If it is set to *No*, the user will not see the *Delete* options in the *Actions* drop down menu when viewing the legacy form list or the *Delete this web form* link when viewing an individual web form.