

Suggested User Role Assignments

Monetate's user roles allow you to limit what members of your organization can do in the platform. These roles and their assigned privileges act as a failsafe to help prevent against inadvertent mistakes and malicious changes to your site.

In addition to the [six different user roles](#) in the Monetate platform, you should add your own checks and balances to your process to help prevent mistakes or to prevent someone from launching an experience that isn't ready. See [Manage Users](#) for descriptions of each user role and its privileges as well as the steps for creating user accounts.

Consider the size of your team and business needs before assigning anyone a role. Aim to match the level of access to various Monetate features and functions with the roles your team members play and what tasks in the platform they may need to do. These considerations are equally important when you work with a partner outside of your organization to fulfill certain roles within your Monetate account. If an assigned user role isn't quite right for a team member, you can [change](#) that person's user role at any time.

Consider these guidelines as you prepare to assign a Monetate user role to your team members:

- **Reporting Only:** Appropriate for anyone in an analytics or data analysis role
- **Experience Building:** Appropriate for anyone in a marketer or marketing analyst role
- **Action Building:** Appropriate for anyone in a marketer, IT, or developer role
- **Experience Building and Activation:** Appropriate for anyone in a supervisory role or someone higher in your organization who is responsible for marketing efforts
- **Experience Manager:** Appropriate for someone higher in your organization who's involved with marketing and has developer experience
- **Administrator:** Appropriate for the person who owns the Monetate account at your organization

You may want to avoid assigning the same person who builds actions in Monetate with the ability to also activate experiences. Doing so can give you an extra opportunity to test an experience before it goes live to your customers.

You can fine-tune user role permissions on certain accounts. Submit a support ticket using the Monetate Technical Support portal (support.monetate.com).

The example below provides a basic workflow that you can use to manage roles for your team.

- **Bob** (Web developer, Action Building role): Bob creates all the action assets to be used on the site. Today, he created an HTML action that inserts information about a sale below the navigation.
- **Alice** (marketer, Experience Building role): Alice uses Bob's action assets and sets up the WHO, WHAT, WHEN, and WHY for an experience that creates a personalized experience for site visitors.
- **Shauna** (QA, Experience Building with Activation role): Shauna receives a ticket to review Alice's experience that is scheduled to go live in a few days. Shauna tests this experience to see how it looks in all the latest browsers. When everything looks as expected, Shauna activates the experience.



It's possible to use Monetate without assigning anyone at your organization an Administrator role. Doing so can prevent anyone from maliciously or accidentally adding or deleting users but requires

you to contact your account manager when you need to make these type of changes.