



onboarding fundamentals

Reference Guide: Recommended Employee Security Rights

The following are recommendations for issued employee security rights based on roles within your firm:

Security Right	Description	Manager	Team Leader	Administrator	Distribution	Conversion	Sales
Access Merge Documents	Allows Access to Merge Documents Templates	x	x	x			
Access Power Tools	Allows the user to access and user the power tools menu items	x	x				
Access Query Tool	Allows the user to access the Fetch Query Tool application	x	x	x		x	x
Access SalesPitch	Allows the user to access SalesPitch. The user will be included in the monthly fee calculation for SalesPitch charges					x	x
Access SalesPitch Conversion Tool	Allows the user to convert Proposals via the SalesPitch Conversion Tool					x	x
Account Maintenance	Allows the user to access and manage PensionPro account information	x					
Add/Edit Client	Allows the user to Add a new Client from the application menu and edit existing client information from the Client Details tab	x	x	x		x	
Add/Edit Contact	Allows the user to Add a new Contact from the application menu and edit existing contact information from the Contact Details tab	x	x	x		x	x
Add/Edit Employee	Allows the user to add a new Employee from the application menu and add and edit user Security Rights from the Employee Details tab	x	x				
Add/Edit Event	Allows the user to add, edit and delete Events	x	x				
Add/Edit Event Configurations	Allows the user to add, edit and delete Event Configurations	x	x				
Add/Edit Fee Schedule	Allows the user to Add and Edit Fee Schedules	x	x				
Add/Edit Interaction	Allows the user to add an Interaction from the application menu and add/edit an Interaction in the Client, Plan, or Contact Details	x	x	x	x	x	x
Add/Edit Plan	Allows the user to Add a new Plan from the application menu and edit existing plan information from the Plan Details tab	x	x	x		x	
Add/Edit Plan Cycles	Allows the user to Edit Plan Cycles	x	x	x		x	
Add/Edit Plan Doc Specs	Allows the user to add/edit plan document specification data	x	x	x		x	
Add/Edit Project	Allows the user to Add a new Project from the Plan Projects tab and edit existing project summary information from the Project Details tab	x	x	x	x	x	

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Authorized Computer Exempt	Allows the user to be exempt from computer authorization, maintain the list of authorized computers, and change the computer authorization application preference	x					
Blast Email	Allows the user to access the Blast Email tools from the application menu	x	x				
Create Merge Documents	Allows access to create merge documents through the merge wizard	x	x	x			
Delete Interaction	Allows the user to delete interactions	x	x				
Delete Notes	Allows the user to delete notes	x	x				
Delete Secure File Exchange	Allows the user to delete a Secure File Exchange	x	x				
Edit Other To-Dos	Allows the user to edit other users To-Dos	x	x				
Edit PlanSponsorLink Styling	Allows the user to change colors, text sizes, etc. on PlanSponsorLink	x					
Edit/Merge Company Names	Allows the user to edit Company Name details and access the Company Name Merge Tool from the Company Details Screen	x	x				
Maintenance	Allows the user access to Maintenance Menu items	x	x				
Manage PSL passwords	Allows the user to manage contacts passwords for accessing PSL	x	x	x	x		
Management Reports	Allows the user to access management reports	x	x				
Manager	Allows the user to access the Management Dashboard and remove completion dates from tasks	x	x				
Reassign Tasks	Allows the user to to reassign tasks	x	x				
Security Management	Allows the user to manage admin level security settings for the firm	x					
Task Override	Allows the user to Override Task items in a project	x	x				
View Events	Allows the user to view Events	x	x	x		x	x
View Other Dashboards	Allows the user to access other employees' dashboards	x	x				
View Other Secure File Exchanges	Allows the user to view all users' Secure File Exchanges	x	x	x	x		