



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 use 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 Data 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 Data 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 Data menu and add and edit user security rights from the Employee Details tab	x	x				
Add/Edit E-Signature Templates	Allows the user access to add, edit, and delete E-Signature templates	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 Data 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 Data 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	

Security Right	Description	Manager	Team Leader	Administrator	Distribution	Conversion	Sales
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 Communications menu	x	x				
Create E-Signature Requests	Allows the user to create E-Signature requests	x	x	x	x	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 PlanSponsorLink	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		