User Roles – Classifications and Customer Segment

Introduction

The form for creating and editing user roles requires selection in 2 fields, in addition to a name and selection of any permissions that define the role's access:

- User Role Classifications
- Customer Segment

These fields provide a user role–level identifier in the platform that indicates the user's classification and business type. These fields are required when you create a new user role or modify an existing role. They can be updated at any time by editing the role definition.

These fields are only visible to, and editable by, administrator users who have access to create and edit user roles, including appropriate Total Expert staff.

This information is used by Total Expert to assess and measure:

- feature access
- usage
- improvement of adoption and engagement
- benchmarking
- best practices

Note
If you need assistance with these fields, please contact your Customer Success Manager.

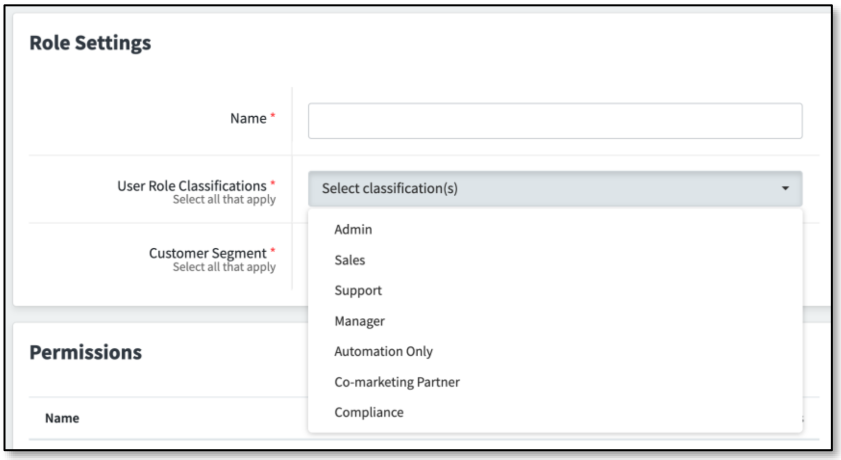
Using the Classifications and Customer Segment Fields

When Creating a New User Role

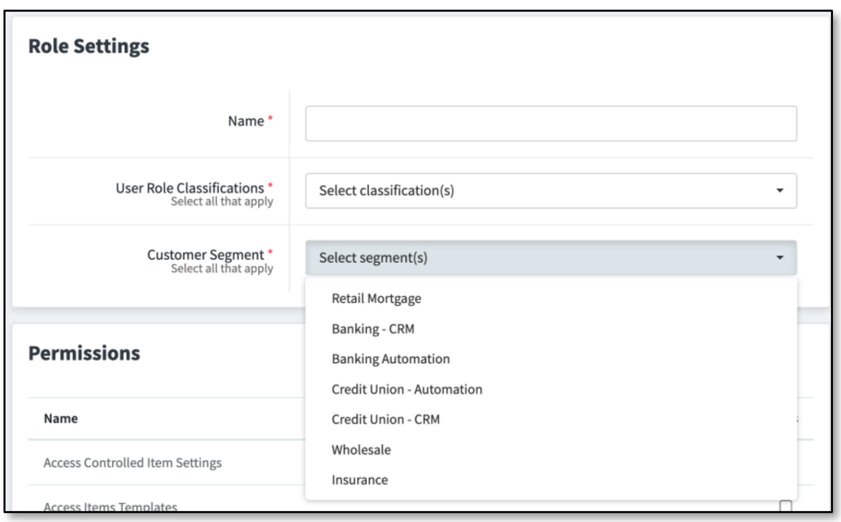
Note
When you create a new user role in the Total Expert UI, both the User Role Classifications and Customer Segment fields are required. Both fields are multi-select, so you can choose more than 1 option for each.

1. Navigate to **Organization Admin → User Roles**.
2. Click the **+Add Role** button.
3. In the slide-out panel:
    a. In the **Name** field, enter a suitable name for the role.
    b. In the **User Role Classifications** drop-down list, select 1 or more of the available options:
        i. Admin

ii. Sales
iii. Support
iv. Manager
v. Automation Only
vi. Co-marketing Partner
vii. Compliance



c. In the **Customer Segment** drop-down list, select 1 or more of the available options. This field populates only the segments that were selected when your organization was created:
   i. Retail Mortgage
   ii. Banking - CRM
   iii. Banking Automation
   iv. Credit Union - Automation
   v. Credit Union – CRM
   vi. Wholesale
   vii. Insurance



d. Check the boxes for whichever permissions should be assigned to the role as usual.
e. Click the **Submit** button.

When Updating an Existing User Role

To update an existing user role:

1. Navigate to **Organization Admin → User Roles**.
2. Check the box for the role you want to update and click the **Update Selected** button (pencil icon).
3. In the slide-out panel:
    a. Update any part of the role definition.
    b. The existing selections for **User Role Classifications** and **Customer Segment** are pre-selected. You can add or remove any options from these fields as long as at least 1 option is chosen in each field before you submit.
    c. Click the **Submit** button.