User Role Classifications and Segments

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Introduction

User roles are used in Total Expert to determine which features and options are available to any user assigned to that role. A single role can be assigned to many users, and if the permission set for that role is updated, all users assigned to that role see the updated functionality.

In addition to the actual permissions assigned to a role, the role also includes 2 attributes:

- User Role Classifications
- Customer Segments

Each of these attributes allows you to clarify the purpose of the role by selecting 1 or more options. When creating or updating a role, both fields must contain at least 1 option before you can save your changes.

These attributes are used *internally* by Total Expert for:

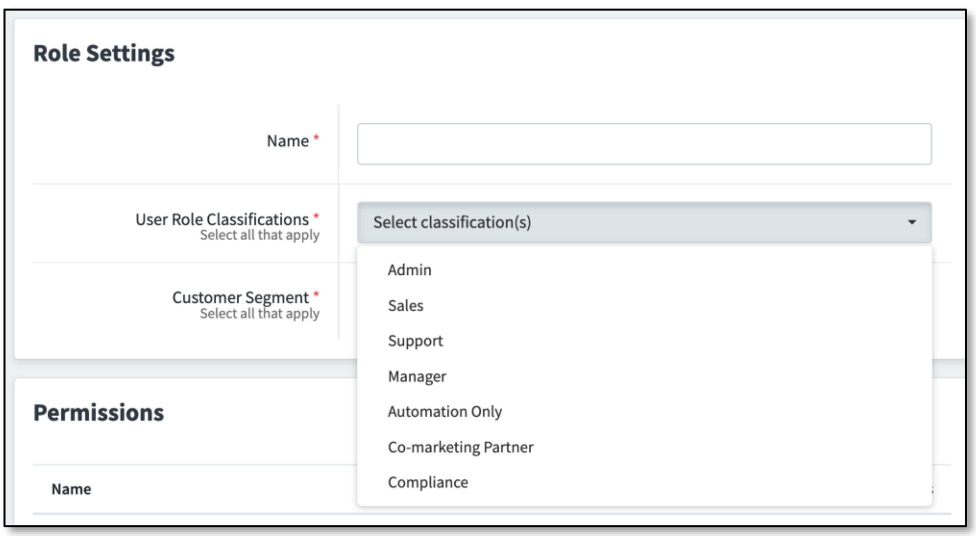
- Assessing and measuring:
  - feature access
  - usage
  - benchmarking
  - ROI
  - adoption expectations and maturity (engagement)
- Identifying gaps in customer campaign strategies
- Tailoring communications and outreach (especially through digital success model)

Note
Defining permissions to roles is typically done during implementation of Total Expert. Updating these definitions is generally not recommended without consultation of your Implementation Manager or Customer Success Manager.

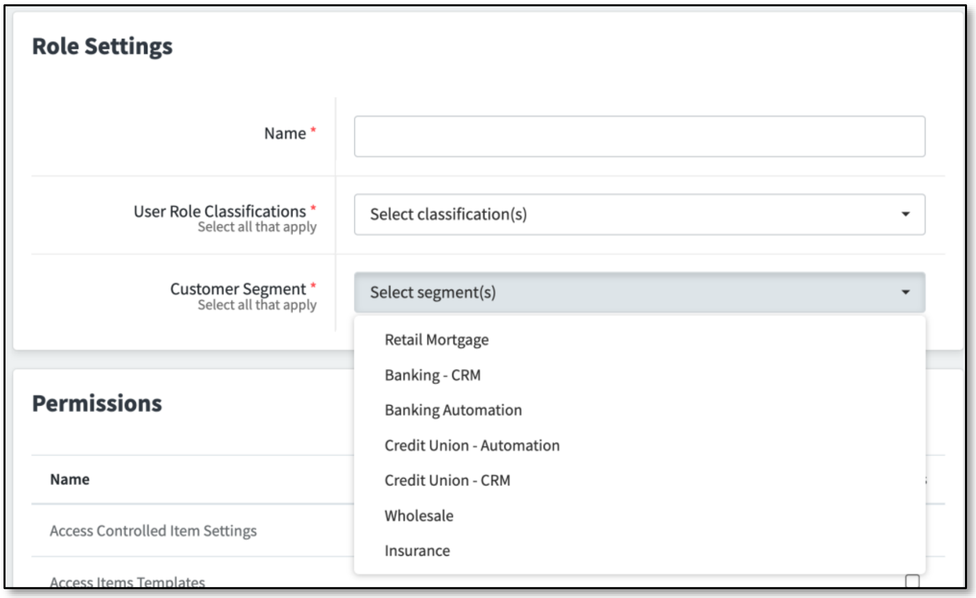
Creating a New User Role

Note
When you create a new user role in the Total Expert UI, both the User Role Classifications and Customer Segments 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, so you might not see all of these options:
        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.

Updating 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.

Bulk Updates

Only a Total Expert customer support team user can perform a bulk update of the User Role Classifications and Customer Segment fields for multiple roles at once. Contact Total Expert's customer support to request a bulk update.

When requesting a bulk update, you must provide the following:

- A list of the roles that you want to update
- The User Role Classifications you want assigned to each role in the list
- The Customer Segments you want assigned to each role in the list