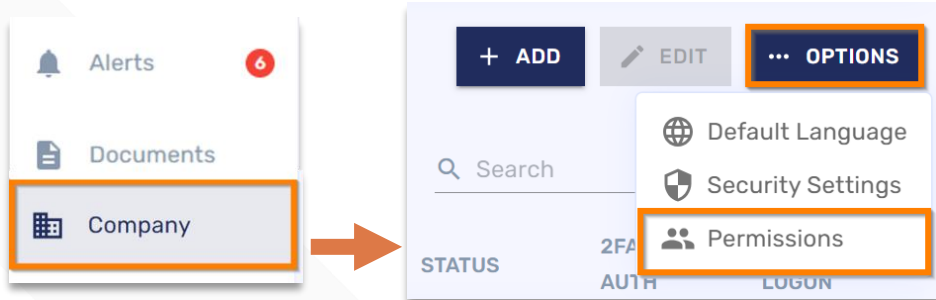# USER PERMISSIONS

- **Access advanced user permissions in the Company page.** <u>Only SuperUsers will have access to customize this.</u>

- **Modify to adapt user profiles to your company's needs.**

Permissions
COMPANY / PERMISSIONS

ROLE
DashboardUser
No Role
SuperUser
User

Default User Profile Permissions:

- **User** is the basic level of access for all document processing-related tasks.

- **SuperUser** has User access, the ability to create and edit other users, and options to customize portal settings and permissions.

- **DashboardUser** (if applicable) has User access and Dashboard editing access.

- **No Role** is a default user type that can be customized and used without setting up a new custom user.

Editing User Permissions

- To edit your company's user permissions, go to the Company page and click on **...Options -> Permissions**

- You will be able to toggle on/off certain access and portal features and actions depending on the user profile.
  - "SuperUser", "User", "DashboardUser" and "No Role" are the default profiles.
    - You will be able to edit all role's permissions but the "SuperUser" profile.
    - *Please reach your Conexiom Representative if you require changes in the "Super User" permissions or more custom profiles created.*

1. Under "Actions", you will see what action to toggle on/off.
2. Under "Descriptions", you will find more detail on the Action.
3. Under "Permissions", toggle this action on/off for the selected user profile.

- To save your changes, click on **Save Changes**

The selected settings will be applied to impacted accounts on their next login.

SAVE CHANGES

①ACTIONS	②DESCRIPTIONS	③PERMISSIONS
Alerts	Allows managing and resolving document alerts.	
Alerts – Hide Unknown Customer Alerts	If enabled, user role is unable to see all Unknown Customer alerts.	
Filter by Assignee	Only display alerts assigned to the user role.	
Configuration Builder	Allows to use Configuration Builder.	
Allow Unlock	Ability to unlock and edit a previously locked field.	
Production	Allows to use Configuration Builder for the production documents.	
Configuration Manager	Allows to request maps using annotations.	
Configuration Studio	Create and manage document configurations.	
Customer List	Allows accessing, adding and managing Customers.	

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