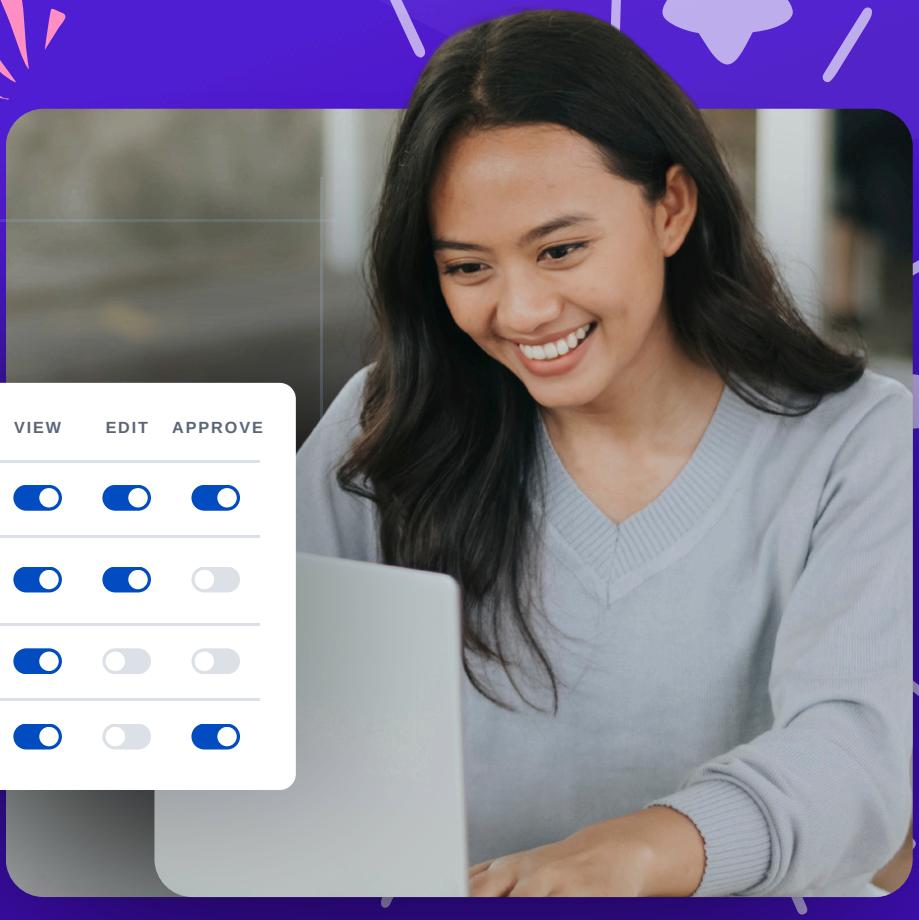
Kinetic

CONFERENCING & EVENTS



ROLE	VIEW	EDIT	APPROVE
CM Conference Manager	●	●	●
EC Event Coordinator	●	●	○
RT Reception team	●	○	○
FI Finance	●	○	●

DEFAULT USER ROLES

Conferencing on Pulse

Default user roles: a guide to what each role can and cannot access

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Kinetic Software

ABOUT THIS GUIDE

About this guide

Conferencing on Pulseis delivered with a set of default user roles. A role controls what each member of your team sees when they log in and what they are able to do once they are there. Assigning the right role means colleagues only see the parts of the system that are relevant to their job, and sensitive information such as contracts and invoicing is only visible to the people who need it.

This guide explains the three levels of access used throughout the system, sets out what each of the seven default roles allows, and provides an at a glance comparison so you can decide which role suits each member of your team.

> The default roles are a starting point designed to cover the most common ways teams work. If none of them is quite right for a particular member of staff, please speak to your Kinetic contact so we can talk through the options with you.

ACCESS LEVELS

Understanding the three levels of access

Every area of Conferencing on Pulse is set to one of three levels for each role. The level determines what the user sees on screen.

LEVEL	WHAT THE USER SEES	WHAT IT MEANS IN PRACTICE
Full access	The area is visible and all buttons are available.	The user can view the information and can add, amend and remove records in that area, exactly as the system works today.
View only	The area is visible, but the add, edit, delete and save buttons are removed or greyed out.	The user can open the area and read everything in it, and can click into individual records to see more detail, but cannot change anything.
No access	The tab, sub tab or button is not shown at all.	The area is hidden from the user completely. They will not see the tab in the menu and will not know the information is there.

A small number of areas are either available or hidden, with no view only setting. These are the additional details sub tab, the activity history, the bedroom areas and dining areas plans, the reports tab and the copy booking button. Where a role shows full access for one of these, the user can see the screen; where it shows no access, the screen or button is hidden.

THE ROLES

The seven default roles

The tablebelow introduces eachrole and thekindof useritisdesigned for. A full breakdown of each role follows, and a complete comparison of every area appears at the end of this guide.

1	**Full Access User**	Conference and events managers, sales and events coordinators, and system administrators who need to run the whole booking lifecycle.
2	**Read Only Access User**	Senior managers, finance reviewers and colleagues from other departments who need full visibility of what is booked but should not change anything.
3	**Full Access, No Accommodation**	Sites or teams that handle conferencing and meetings only, where bedrooms are managed elsewhere or not sold at all.
4	**Full Access, No Finance**	Event coordinators and operational planners who need to build and manage bookings in full, but should not see or handle charging.
5	**Read Only, No Finance**	Colleagues who need to see what is booked and when, without any ability to change it and without sight of commercial information.
6	**Operational Staff**	Delivery teams such as catering, portering, audio visual, housekeeping and duty management, who need to know what is happening and when in order to service the booking.
7	**Plans Only**	Front of house, reception and porters who only need to see what is on, where and when, with no involvement in the booking itself.

Full Access User

Who this role is for

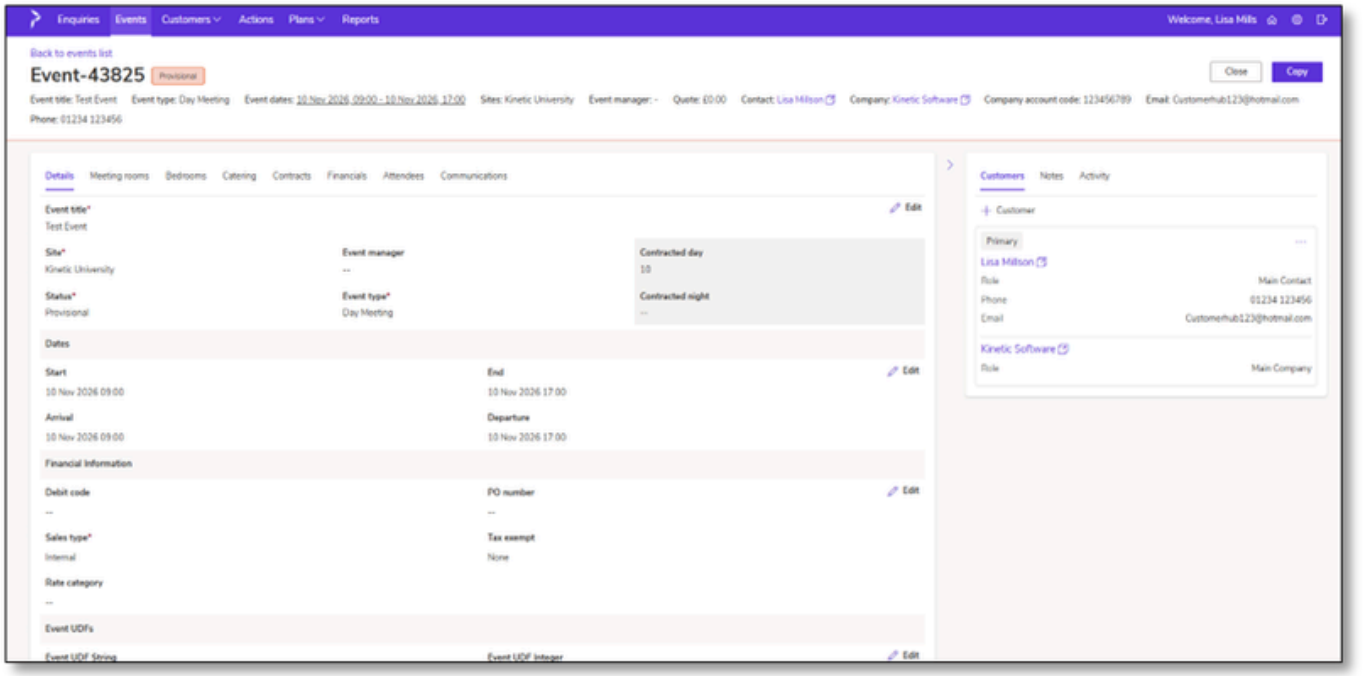
Conference and events managers, sales and events coordinators, and system administrators who need to run the whole booking lifecycle.

What this role can do

This role gives the user everything Conferencing on Pulse has to offer. Enquiries, events, bedrooms, catering, contracts, financials, customer records, plans and reports are all fully available, and the user can create, amend and remove records throughout.

What this role cannot do

Nothing is hidden or restricted for this role. It should be given only to users you are happy to have full control of bookings and financial information.



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DEFAULT ROLE 1 OF 7

Full Access User

Area by area

AREA	ACCESS	WHAT THIS MEANS FOR THE USER
ENQUIRIES AND EVENTS		
Enquiries	Full access	View the enquiries list and raise new enquiries, both from the Enquiries screen and from the Home dashboard.
Creating events	Full access	Convert an enquiry into a confirmed event, and create events directly from the conference room plan.
Copy booking	Full access	Copy an existing booking to create a new one.
THE EVENT RECORD		
Event details	Full access	View and amend every section of the event details screen.
Meeting rooms and equipment	Full access	Add, amend and remove meeting rooms, and book equipment against them.
Bedrooms	Full access	Manage bedroom reservations and rooming lists in full, including adding, checking and exporting.
Catering	Full access	Add, amend, copy and delete catering sessions, and record dietary requirements.
Contracts	Full access	Generate, edit and publish contracts.
Attendees	Full access	Add and amend attendees on the event.
FINANCIALS		
Quotes	Full access	Create new quotes and amend existing ones.
Deposits	Full access	Add and amend deposits.
Current charges	Full access	Add, amend and remove charges on the event.
Invoices	Full access	Generate and credit invoices.
COMMUNICATIONS		
Documents	Full access	View documents held against the event and upload new ones.
Dialogue	Full access	View, add and amend dialogue recorded against the event.
Event actions	Full access	Add, amend, reassign and complete actions raised against the event.
Additional details	Full access	View and maintain the additional details recorded against the event.
Change requests	Full access	View change requests and update their status.

Full Access User

Area by area (continued)

AREA	ACCESS	WHAT THIS MEANS FOR THE USER
CUSTOMERS, CONTACTS AND COMPANIES		
Customers (on the event)	Full access	Add and amend the contacts and companies linked to the event.
Contacts	Full access	Add new contacts and maintain existing contact records.
Companies	Full access	Add new companies and maintain existing company records.
NOTES, ACTIONS AND ACTIVITY		
Notes	Full access	Add and amend notes.
Actions (main tab)	Full access	Add, amend, reassign and complete actions from the main Actions tab.
Activity	Full access	View the full activity history recorded against the event.
PLANS		
Conference room plan	Full access	View the conference room plan and add events, ad hoc bookings and out of service entries directly from it.
Bedroom areas plan	Full access	View the bedroom areas plan.
Dining areas plan	Full access	View the dining areas plan.
REPORTING		
Reports	Full access	Access the Reports tab and run the reports available there.

Read Only Access User

Who this role is for

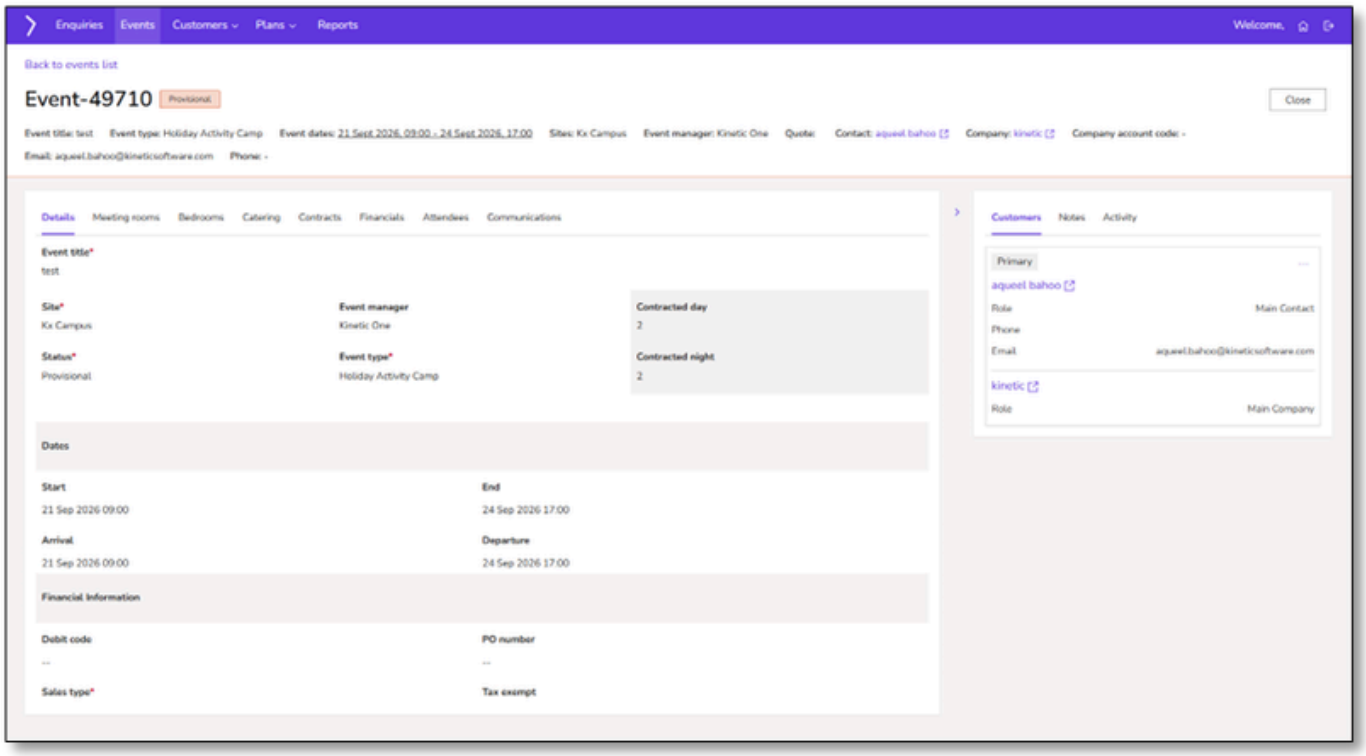
Senior managers, finance reviewers and colleagues from other departments who need full visibility of what is booked but should not change anything.

What this role can do

This role lets the user see the whole picture without being able to change it. Every area of the system can be opened and read, including financials, but the buttons that add, edit, delete or publish are removed throughout.

What this role cannot do

The user cannot raise enquiries, create events, copy a booking, or amend any record. Reports, the activity history, the additional details sub tab and the bedroom and dining area plans remain fully available, as these are view only screens in any case.



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Read Only Access User

Area by area

AREA	ACCESS	WHAT THIS MEANS FOR THE USER
ENQUIRIES AND EVENTS		
Enquiries	View only	View the enquiries list, but the New Enquiry button is removed from both the Enquiries screen and the Home dashboard, so no new enquiries can be raised.
Creating events	View only	Events cannot be created. The Save and Create Event option within an enquiry is unavailable, as is Create Event on the conference room plan.
Copy booking	No access	The Copy Booking button is not visible.
THE EVENT RECORD		
Event details	View only	See all of the event details, but the edit button on each section is removed so nothing can be changed.
Meeting rooms and equipment	View only	Open a booked room to view its detail and see the equipment booked, but nothing can be added, amended or removed and no changes can be saved.
Bedrooms	View only	View reservations and rooming lists, but the add, check and export options are removed and rows cannot be edited.
Catering	View only	Open a catering session to view the detail, but sessions cannot be added, amended, copied or deleted and dietary requirements cannot be added or changed.
Contracts	View only	View contracts that already exist, but the generate, edit and publish options are unavailable.
Attendees	View only	View the attendee list, but attendees cannot be added or amended.
FINANCIALS		
Quotes	View only	View quotes, but a new quote cannot be created and an existing quote cannot be changed.
Deposits	View only	View deposits, but they cannot be added or amended.
Current charges	View only	View the charges on the event, but nothing can be added, amended or deleted and rows cannot be edited.
Invoices	View only	View invoices, but they cannot be generated or credited.
COMMUNICATIONS		
Documents	View only	View documents already held against the event, but new documents cannot be uploaded.
Dialogue	View only	Read the dialogue recorded against the event, but nothing can be added or amended.

Read Only Access User

Area by area (continued)

AREA	ACCESS	WHAT THIS MEANS FOR THE USER
COMMUNICATIONS (CONTINUED)		
Event actions	View only	View actions raised against the event, but they cannot be added, amended, reassigned or finished.
Additional details	Full access	View the additional details recorded against the event. This section is informative only and has no edit functionalities.
Change requests	View only	View change requests, but their status cannot be changed.
CUSTOMERS, CONTACTS AND COMPANIES		
Customers (on the event)	View only	See which contacts and companies are linked to the event, but contacts and companies cannot be added or amended here.
Contacts	View only	Look up contact records, but new contacts cannot be added and existing details cannot be changed. This also applies when adding a contact from an enquiry, from the clients tab of an event or from the conference room plan.
Companies	View only	Look up company records, but new companies cannot be added and existing details cannot be changed. This also applies when adding a company from an enquiry, from the clients tab of an event or from the conference room plan.
NOTES, ACTIONS AND ACTIVITY		
Notes	View only	Read notes, but notes cannot be added or amended.
Actions (main tab)	View only	View actions from the main Actions tab, but they cannot be added, amended, reassigned or finished.
Activity	Full access	View the full activity history recorded against the event. This section is informative only and has no edit functionalities.
PLANS		
Conference room plan	View only	View the conference room plan, but events, ad hoc bookings and out of service entries cannot be added from it.
Bedroom areas plan	Full access	View the bedroom areas plan. This section is informative only and has no edit functionalities.
Dining areas plan	Full access	View the dining areas plan. This section is informative only and has no edit functionalities.
REPORTING		
Reports	Full access	Access the Reports tab and run the reports available there. This section is informative only and has no edit functionalities.

Full Access, No Accommodation

Who this role is for

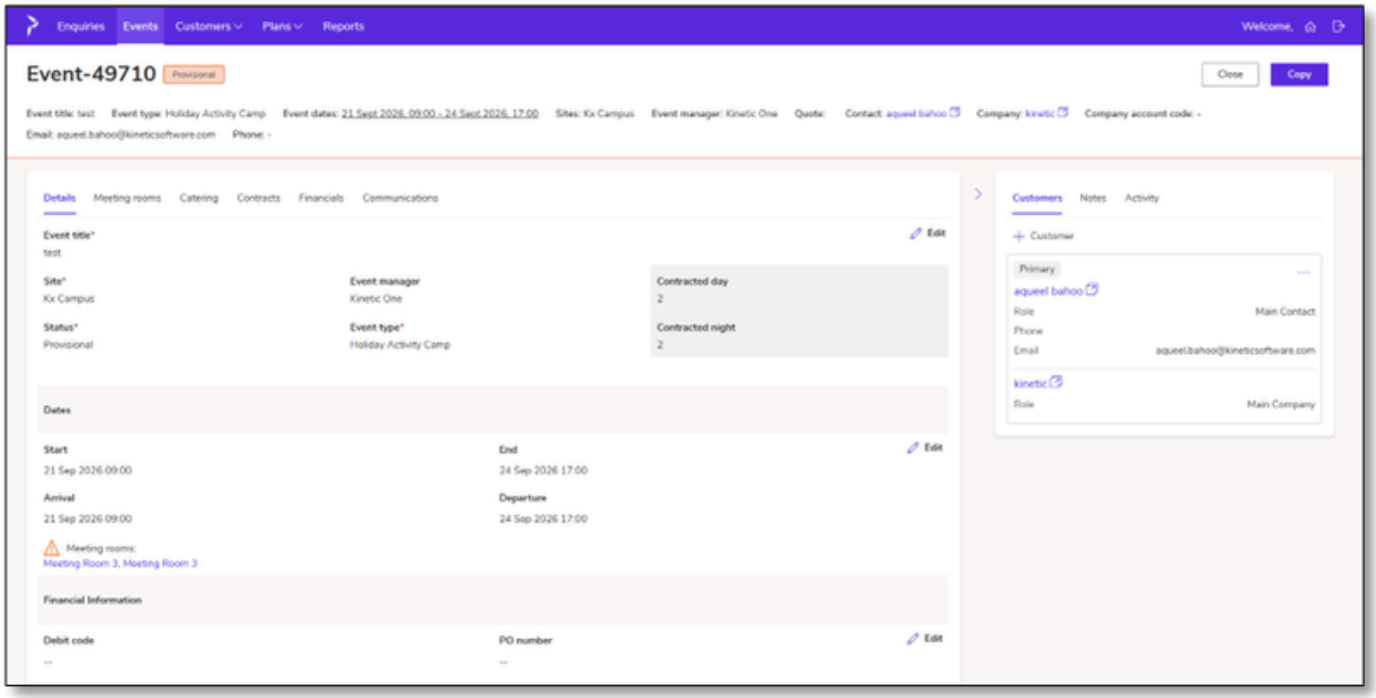
Sites or teams that handle conferencing and meetings only, where bedrooms are managed elsewhere or not sold at all.

What this role can do

This role is identical to Full Access User, with the accommodation side of the system removed. The user has complete control of enquiries, events, meeting rooms, catering, contracts, financials, customer records, plans and reports.

What this role cannot do

The Bedrooms tab, the Attendees tab and the bedroom areas plan are hidden entirely, so no bedroom reservations, rooming lists or attendee records can be seen or maintained.



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DEFAULT ROLE 3 OF 7

Full Access, No Accommodation

Area by area

AREA	ACCESS	WHAT THIS MEANS FOR THE USER
ENQUIRIES AND EVENTS		
Enquiries	Full access	View the enquiries list and raise new enquiries, both from the Enquiries screen and from the Home dashboard.
Creating events	Full access	Convert an enquiry into a confirmed event, and create events directly from the conference room plan.
Copy booking	Full access	Copy an existing booking to create a new one.
THE EVENT RECORD		
Event details	Full access	View and amend every section of the event details screen.
Meeting rooms and equipment	Full access	Add, amend and remove meeting rooms, and book equipment against them.
Bedrooms	No access	The Bedrooms tab of the event is not visible.
Catering	Full access	Add, amend, copy and delete catering sessions, and record dietary requirements.
Contracts	Full access	Generate, edit and publish contracts.
Attendees	No access	The Attendees tab of the event is not visible.
FINANCIALS		
Quotes	Full access	Create new quotes and amend existing ones.
Deposits	Full access	Add and amend deposits.
Current charges	Full access	Add, amend and remove charges on the event.
Invoices	Full access	Generate and credit invoices.
COMMUNICATIONS		
Documents	Full access	View documents held against the event and upload new ones.
Dialogue	Full access	View, add and amend dialogue recorded against the event.
Event actions	Full access	Add, amend, reassign and complete actions raised against the event.
Additional details	Full access	View and maintain the additional details recorded against the event.
Change requests	Full access	View change requests and update their status.

Full Access, No Accommodation

Area by area (continued)

AREA	ACCESS	WHAT THIS MEANS FOR THE USER
CUSTOMERS, CONTACTS AND COMPANIES		
Customers (on the event)	Full access	Add and amend the contacts and companies linked to the event.
Contacts	Full access	Add new contacts and maintain existing contact records.
Companies	Full access	Add new companies and maintain existing company records.
NOTES, ACTIONS AND ACTIVITY		
Notes	Full access	Add and amend notes.
Actions (main tab)	Full access	Add, amend, reassign and complete actions from the main Actions tab.
Activity	Full access	View the full activity history recorded against the event.
PLANS		
Conference room plan	Full access	View the conference room plan and add events, ad hoc bookings and out of service entries directly from it.
Bedroom areas plan	No access	The bedroom areas plan is not visible.
Dining areas plan	Full access	View the dining areas plan.
REPORTING		
Reports	Full access	Access the Reports tab and run the reports available there.

Full Access, No Finance

Who this role is for

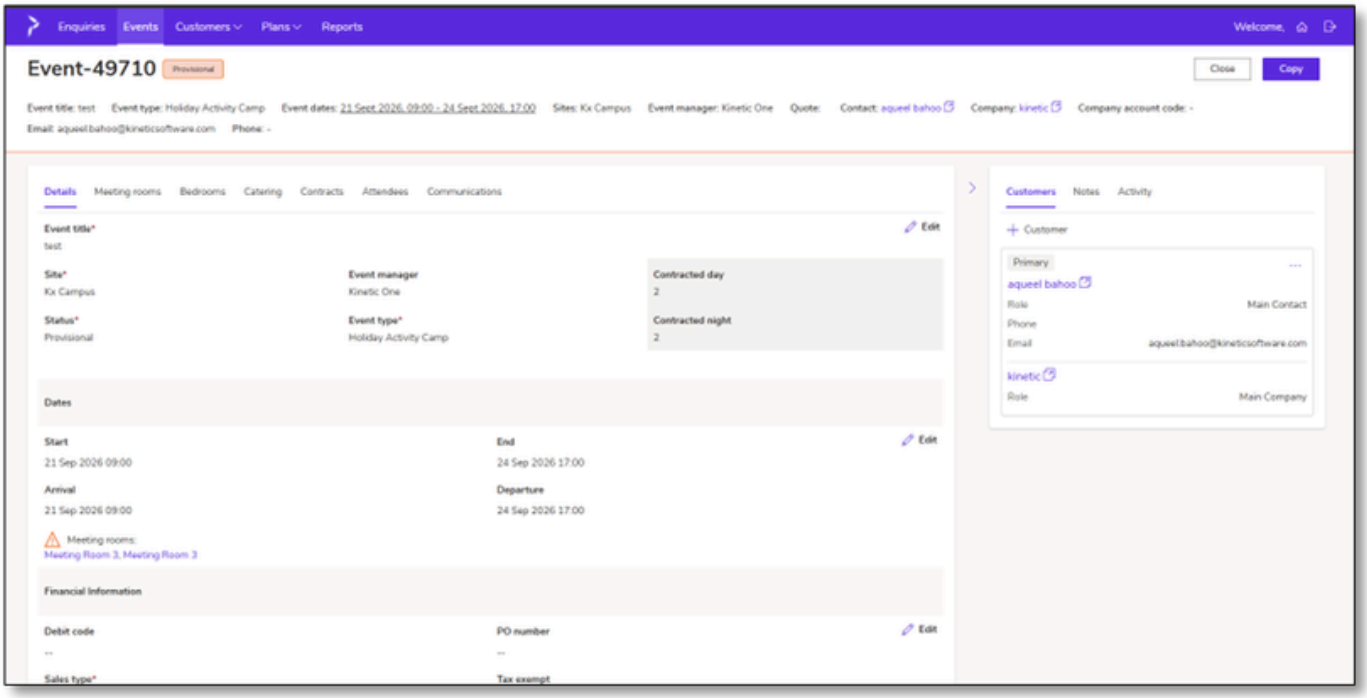
Event coordinators and operational planners who need to build and manage bookings in full, but should not see or handle charging.

What this role can do

This role gives full control of the operational side of a booking. The user can raise enquiries, create and amend events, manage meeting rooms, bedrooms, catering, attendees, contracts, customer records, plans and reports.

What this role cannot do

The four financial sub tabs on an event, Quotes, Deposits, Current Charges and Invoices, are hidden completely. The user cannot see pricing, raise a quote, take a deposit, add a charge or produce an invoice.



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DEFAULT ROLE 4 OF 7

Full Access, No Finance

Area by area

AREA	ACCESS	WHAT THIS MEANS FOR THE USER
ENQUIRIES AND EVENTS		
Enquiries	Full access	View the enquiries list and raise new enquiries, both from the Enquiries screen and from the Home dashboard.
Creating events	Full access	Convert an enquiry into a confirmed event, and create events directly from the conference room plan.
Copy booking	Full access	Copy an existing booking to create a new one.
THE EVENT RECORD		
Event details	Full access	View and amend every section of the event details screen.
Meeting rooms and equipment	Full access	Add, amend and remove meeting rooms, and book equipment against them.
Bedrooms	Full access	Manage bedroom reservations and rooming lists in full, including adding, checking and exporting.
Catering	Full access	Add, amend, copy and delete catering sessions, and record dietary requirements.
Contracts	Full access	Generate, edit and publish contracts.
Attendees	Full access	Add and amend attendees on the event.
FINANCIALS		
Quotes	No access	The Quotes sub tab is not visible on the event.
Deposits	No access	The Deposits sub tab is not visible on the event.
Current charges	No access	The Current Charges sub tab is not visible on the event.
Invoices	No access	The Invoices sub tab is not visible on the event.
COMMUNICATIONS		
Documents	Full access	View documents held against the event and upload new ones.
Dialogue	Full access	View, add and amend dialogue recorded against the event.
Event actions	Full access	Add, amend, reassign and complete actions raised against the event.
Additional details	Full access	View and maintain the additional details recorded against the event.
Change requests	Full access	View change requests and update their status.

Full Access, No Finance

Area by area (continued)

AREA	ACCESS	WHAT THIS MEANS FOR THE USER
CUSTOMERS, CONTACTS AND COMPANIES		
Customers (on the event)	Full access	Add and amend the contacts and companies linked to the event.
Contacts	Full access	Add new contacts and maintain existing contact records.
Companies	Full access	Add new companies and maintain existing company records.
NOTES, ACTIONS AND ACTIVITY		
Notes	Full access	Add and amend notes.
Actions (main tab)	Full access	Add, amend, reassign and complete actions from the main Actions tab.
Activity	Full access	View the full activity history recorded against the event.
PLANS		
Conference room plan	Full access	View the conference room plan and add events, ad hoc bookings and out of service entries directly from it.
Bedroom areas plan	Full access	View the bedroom areas plan.
Dining areas plan	Full access	View the dining areas plan.
REPORTING		
Reports	Full access	Access the Reports tab and run the reports available there.

Read Only, No Finance

Who this role is for

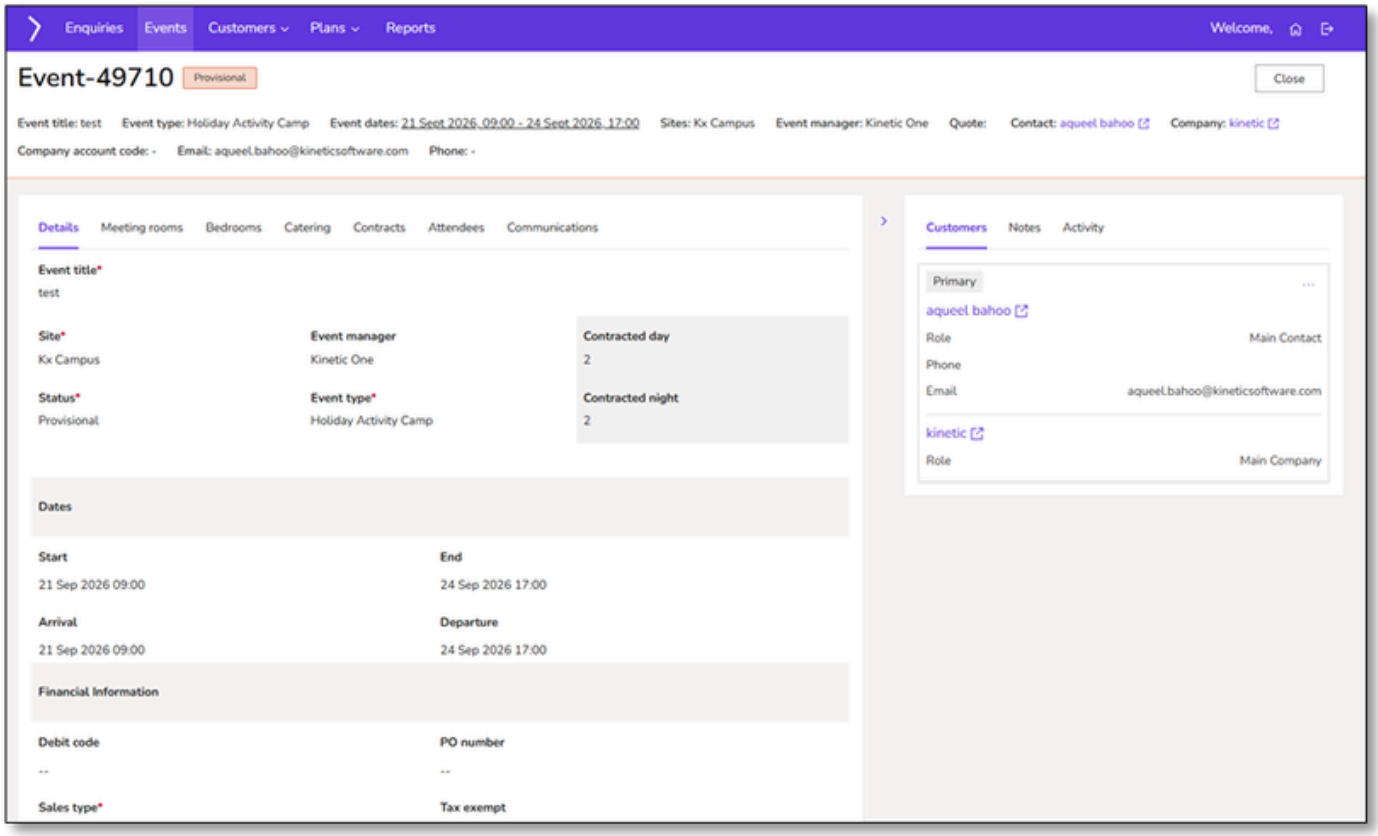
Colleagues who need to see what is booked and when, without any ability to change it and without sight of commercial information.

What this role can do

This role combines view only access with the financial areas removed. The user can open and read enquiries, events, meeting rooms, bedrooms, catering, contracts, attendees, communications, customer records and plans, and can run reports.

What this role cannot do

Nothing can be added, amended or deleted anywhere, and bookings cannot be copied. The Quotes, Deposits, Current Charges and Invoices sub tabs are hidden completely, so no financial information is visible.



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DEFAULT ROLE 5 OF 7

Read Only, No Finance

Area by area

AREA	ACCESS	WHAT THIS MEANS FOR THE USER
ENQUIRIES AND EVENTS		
Enquiries	View only	View the enquiries list, but the New Enquiry button is removed from both the Enquiries screen and the Home dashboard, so no new enquiries can be raised.
Creating events	View only	Events cannot be created. The Save and Create Event option within an enquiry is unavailable, as is Create Event on the conference room plan.
Copy booking	No access	The Copy Booking button is not visible.
THE EVENT RECORD		
Event details	View only	See all of the event details, but the edit button on each section is removed so nothing can be changed.
Meeting rooms and equipment	View only	Open a booked room to view its detail and see the equipment booked, but nothing can be added, amended or removed and no changes can be saved.
Bedrooms	View only	View reservations and rooming lists, but the add, check and export options are removed and rows cannot be edited.
Catering	View only	Open a catering session to view the detail, but sessions cannot be added, amended, copied or deleted and dietary requirements cannot be added or changed.
Contracts	View only	View contracts that already exist, but the generate, edit and publish options are unavailable.
Attendees	View only	View the attendee list, but attendees cannot be added or amended.
FINANCIALS		
Quotes	No access	The Quotes sub tab is not visible on the event.
Deposits	No access	The Deposits sub tab is not visible on the event.
Current charges	No access	The Current Charges sub tab is not visible on the event.
Invoices	No access	The Invoices sub tab is not visible on the event.
COMMUNICATIONS		
Documents	View only	View documents already held against the event, but new documents cannot be uploaded.
Dialogue	View only	Read the dialogue recorded against the event, but nothing can be added or amended.
Event actions	View only	View actions raised against the event, but they cannot be added, amended, reassigned or finished.

Read Only, No Finance

Area by area (continued)

AREA	ACCESS	WHAT THIS MEANS FOR THE USER
COMMUNICATIONS (CONTINUED)		
Additional details	Full access	View and maintain the additional details recorded against the event.
Change requests	View only	View change requests, but their status cannot be changed.
CUSTOMERS, CONTACTS AND COMPANIES		
Customers (on the event)	View only	See which contacts and companies are linked to the event, but contacts and companies cannot be added or amended here.
Contacts	View only	Look up contact records, but new contacts cannot be added and existing details cannot be changed. This also applies when adding a contact from an enquiry, from the clients tab of an event or from the conference room plan.
Companies	View only	Look up company records, but new companies cannot be added and existing details cannot be changed. This also applies when adding a company from an enquiry, from the clients tab of an event or from the conference room plan.
NOTES, ACTIONS AND ACTIVITY		
Notes	View only	Read notes, but notes cannot be added or amended.
Actions (main tab)	View only	View actions from the main Actions tab, but they cannot be added, amended, reassigned or finished.
Activity	Full access	View the full activity history recorded against the event.
PLANS		
Conference room plan	View only	View the conference room plan, but events, ad hoc bookings and out of service entries cannot be added from it.
Bedroom areas plan	Full access	View the bedroom areas plan.
Dining areas plan	Full access	View the dining areas plan.
REPORTING		
Reports	Full access	Access the Reports tab and run the reports available there.

Operational Staff

Who this role is for

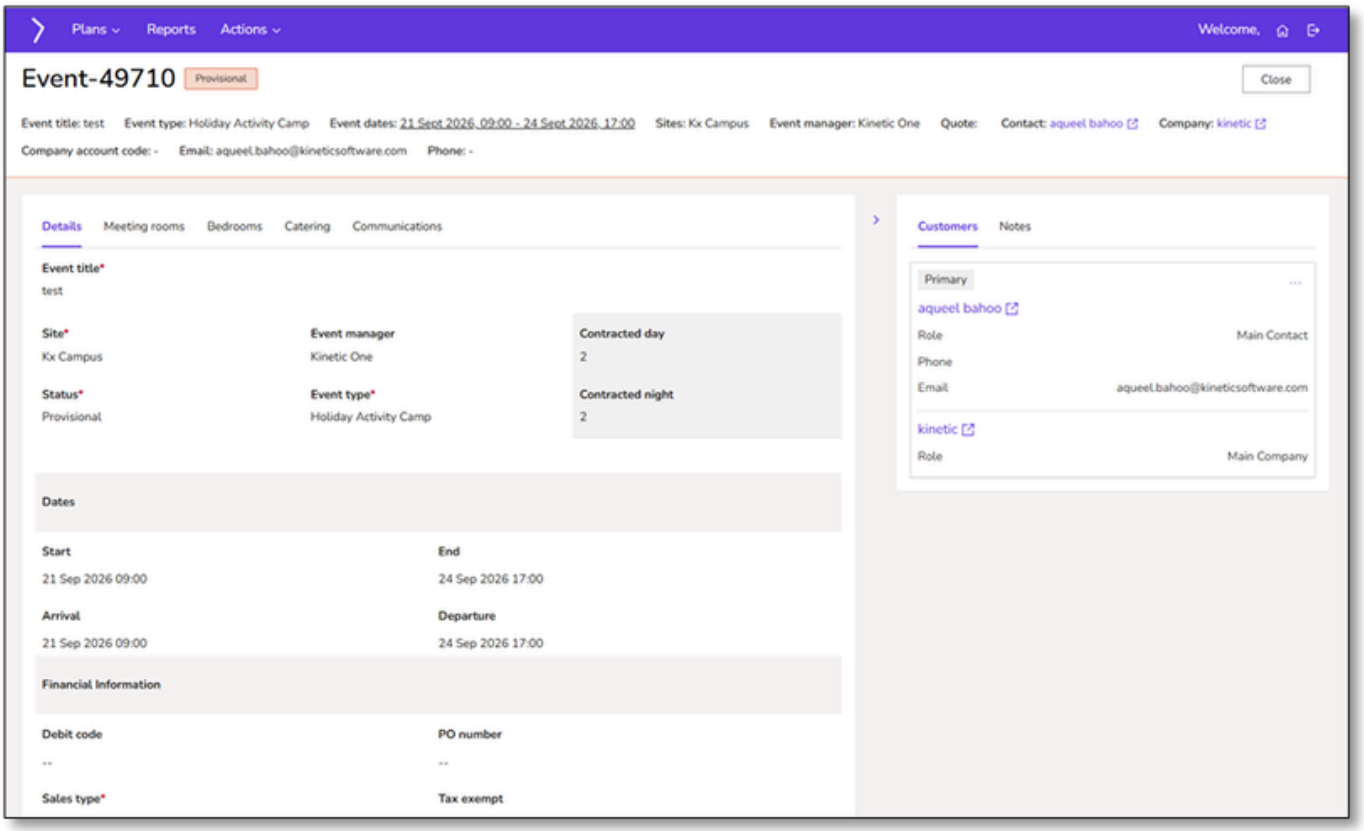
Delivery teams such as catering, portering, audio visual, housekeeping and duty management, who need to know what is happening and when in order to service the booking.

What this role can do

This role is built around delivering the event rather than selling or administering it. The user can open an event and read the detail they need, including the event details, meeting room and equipment requirements, bedroom reservations, catering and dietary requirements, notes and communications, and they can view the plans and run reports.

What this role cannot do

The user cannot raise enquiries or create events, and the enquiries list is hidden. Contracts, all four financial sub tabs, attendees, the activity history, and the contacts and companies tabs are not visible, and bookings cannot be copied. Everything that is visible is view only, so no changes can be made.



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Operational Staff

Area by area

AREA	ACCESS	WHAT THIS MEANS FOR THE USER
ENQUIRIES AND EVENTS		
Enquiries	No access	The Enquiries list is not visible at all, and the New Enquiry button is removed from the Home dashboard.
Creating events	No access	Events cannot be created. The Save and Create Event option within an enquiry is unavailable, as is Create Event on the conference room plan.
Copy booking	No access	The Copy Booking button is not visible.
THE EVENT RECORD		
Event details	View only	See all of the event details, but the edit button on each section is removed so nothing can be changed.
Meeting rooms and equipment	View only	Open a booked room to view its detail and see the equipment booked, but nothing can be added, amended or removed and no changes can be saved.
Bedrooms	View only	View reservations and rooming lists, but the add, check and export options are removed and rows cannot be edited.
Catering	View only	Open a catering session to view the detail, but sessions cannot be added, amended, copied or deleted and dietary requirements cannot be added or changed.
Contracts	No access	The Contracts tab of the event is not visible.
Attendees	No access	The Attendees tab of the event is not visible.
FINANCIALS		
Quotes	No access	The Quotes sub tab is not visible on the event.
Deposits	No access	The Deposits sub tab is not visible on the event.
Current charges	No access	The Current Charges sub tab is not visible on the event.
Invoices	No access	The Invoices sub tab is not visible on the event.
COMMUNICATIONS		
Documents	View only	View documents already held against the event, but new documents cannot be uploaded.
Dialogue	View only	Read the dialogue recorded against the event, but nothing can be added or amended.
Event actions	View only	View actions raised against the event, but they cannot be added, amended, reassigned or finished.

Operational Staff

Area by area (continued)

AREA	ACCESS	WHAT THIS MEANS FOR THE USER
COMMUNICATIONS (CONTINUED)		
Additional details	Full access	View and maintain the additional details recorded against the event.
Change requests	View only	View change requests, but their status cannot be changed.
CUSTOMERS, CONTACTS AND COMPANIES		
Customers (on the event)	View only	See which contacts and companies are linked to the event, but contacts and companies cannot be added or amended here.
Contacts	No access	The Contacts tab is not visible.
Companies	No access	The Companies tab is not visible.
NOTES, ACTIONS AND ACTIVITY		
Notes	View only	Read notes, but notes cannot be added or amended.
Actions (main tab)	View only	View actions from the main Actions tab, but they cannot be added, amended, reassigned or finished.
Activity	No access	The Activity tab is not visible on the event.
PLANS		
Conference room plan	View only	View the conference room plan, but events, ad hoc bookings and out of service entries cannot be added from it.
Bedroom areas plan	Full access	View the bedroom areas plan.
Dining areas plan	Full access	View the dining areas plan.
REPORTING		
Reports	Full access	Access the Reports tab and run the reports available there.

DEFAULT ROLE 7 OF 7

Plans Only

Who this role is for

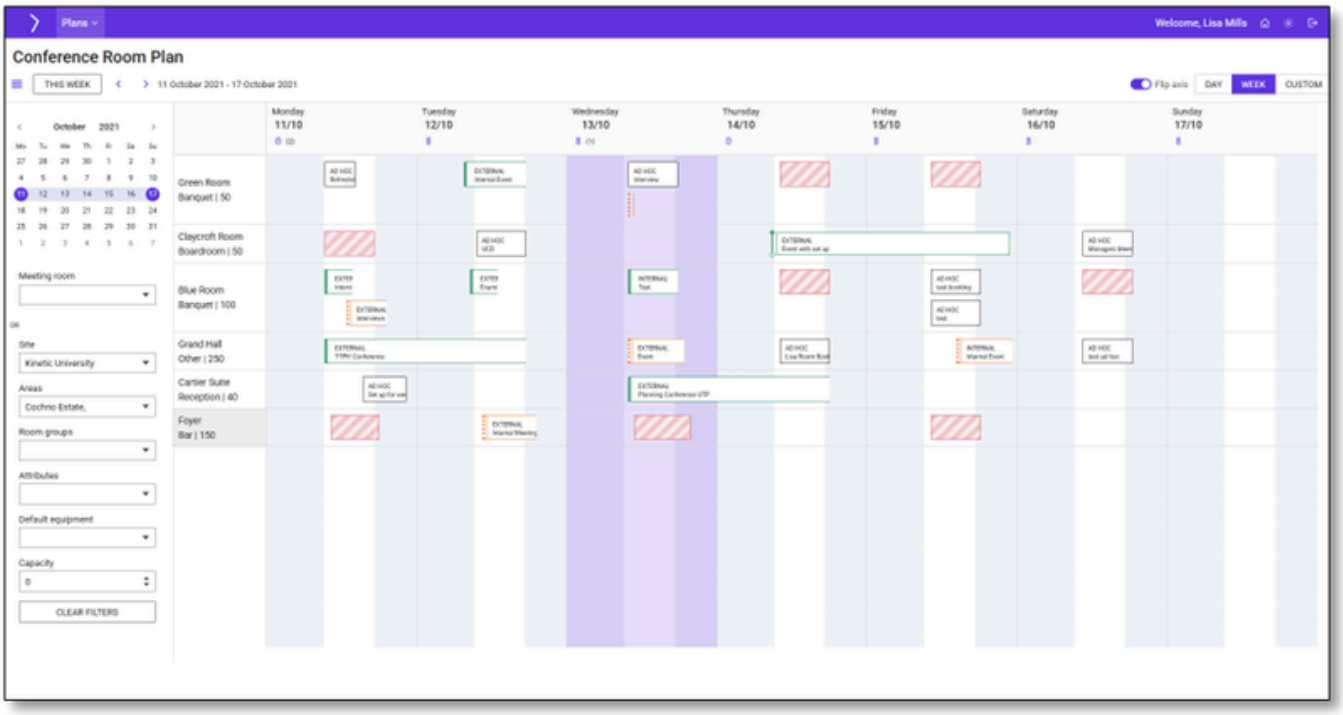
Front of house, reception and porters who only need to see what is on, where and when, with no involvement in the booking itself.

What this role can do

This is the most restricted role. The user sees the plans and nothing else. The conference room plan can be viewed to see which rooms are in use, and the bedroom areas and dining areas plans are available to view.

What this role cannot do

Every other part of Conferencing on Pulse is hidden. Enquiries, events and all of their tabs, contacts, companies, actions, notes and reports are not visible, and nothing can be added or changed anywhere, including on the conference room plan.



Kinetic

DEFAULT ROLE 7 OF 7

Plans Only

Area by area

AREA	ACCESS	WHAT THIS MEANS FOR THE USER
ENQUIRIES AND EVENTS		
Enquiries	No access	The Enquiries list is not visible at all, and the New Enquiry button is removed from the Home dashboard.
Creating events	No access	Events cannot be created. The Save and Create Event option within an enquiry is unavailable, as is Create Event on the conference room plan.
Copy booking	No access	The Copy Booking button is not visible.
THE EVENT RECORD		
Event details	No access	The Event Details tab of the event is not visible.
Meeting rooms and equipment	No access	The Meeting Rooms tab of the event is not visible.
Bedrooms	No access	The Bedrooms tab of the event is not visible.
Catering	No access	The Catering tab of the event is not visible.
Contracts	No access	The Contracts tab of the event is not visible.
Attendees	No access	The Attendees tab of the event is not visible.
FINANCIALS		
Quotes	No access	The Quotes sub tab is not visible on the event.
Deposits	No access	The Deposits sub tab is not visible on the event.
Current charges	No access	The Current Charges sub tab is not visible on the event.
Invoices	No access	The Invoices sub tab is not visible on the event.
COMMUNICATIONS		
Documents	No access	The Documents sub tab is not visible on the event.
Dialogue	No access	The Dialogue sub tab is not visible on the event.
Event actions	No access	The Actions sub tab on the event is not visible.
Additional details	No access	The Additional Details sub tab is not visible on the event.
Change requests	No access	The Change Requests sub tab is not visible on the event.

Plans Only

Area by area (continued)

AREA	ACCESS	WHAT THIS MEANS FOR THE USER
CUSTOMERS, CONTACTS AND COMPANIES		
Customers (on the event)	No access	The Customers tab of the event is not visible.
Contacts	No access	The Contacts tab is not visible.
Companies	No access	The Companies tab is not visible.
NOTES, ACTIONS AND ACTIVITY		
Notes	No access	The Notes tab of the event is not visible.
Actions (main tab)	No access	The main Actions tab is not visible.
Activity	No access	The Activity tab is not visible on the event.
PLANS		
Conference room plan	View only	View the conference room plan, but events, ad hoc bookings and out of service entries cannot be added from it.
Bedroom areas plan	Full access	View the bedroom areas plan. This section is informative only and has no edit functionalities.
Dining areas plan	Full access	View the dining areas plan. This section is informative only and has no edit functionalities.
REPORTING		
Reports	No access	The Reports tab is not visible.

COMPARISON

All roles at a glance

Full access - can view and change

View only - can see but not change

Hidden - not visible to the user

Thistableshowsthelevelofaccesseachdefault role has to every area of Conferencing on Pulse. Use it to compare roles side by side when deciding which one to assign.

AREA	Full Access User	Read Only Access User	Full Access (No Accommodation)	Full Access (No Finance)	Read Only (No Finance)	Operational Staff	Plans Only
ENQUIRIES AND EVENTS							
Enquiries	Full	View	Full	Full	View	Hidden	Hidden
Creating events	Full	View	Full	Full	View	Hidden	Hidden
Copy booking	Full	Hidden	Full	Full	Hidden	Hidden	Hidden
THE EVENT RECORD							
Event details	Full	View	Full	Full	View	View	Hidden
Meeting rooms and equipment	Full	View	Full	Full	View	View	Hidden
Bedrooms	Full	View	Hidden	Full	View	View	Hidden
Catering	Full	View	Full	Full	View	View	Hidden
Contracts	Full	View	Full	Full	View	Hidden	Hidden
Attendees	Full	View	Hidden	Full	View	Hidden	Hidden
FINANCIALS							
Quotes	Full	View	Full	Hidden	Hidden	Hidden	Hidden
Deposits	Full	View	Full	Hidden	Hidden	Hidden	Hidden
Current charges	Full	View	Full	Hidden	Hidden	Hidden	Hidden
Invoices	Full	View	Full	Hidden	Hidden	Hidden	Hidden
COMMUNICATIONS							
Documents	Full	View	Full	Full	View	View	Hidden
Dialogue	Full	View	Full	Full	View	View	Hidden
Event actions	Full	View	Full	Full	View	View	Hidden
Additional details	Full	Full	Full	Full	Full	Full	Hidden
Change requests	Full	View	Full	Full	View	View	Hidden
CUSTOMERS, CONTACTS AND COMPANIES							
Customers (on the event)	Full	View	Full	Full	View	View	Hidden
Contacts	Full	View	Full	Full	View	Hidden	Hidden
Companies	Full	View	Full	Full	View	Hidden	Hidden
NOTES, ACTIONS AND ACTIVITY							
Notes	Full	View	Full	Full	View	View	Hidden
Actions (main tab)	Full	View	Full	Full	View	View	Hidden
Activity	Full	Full	Full	Full	Full	Hidden	Hidden
PLANS							
Conference room plan	Full	View	Full	Full	View	View	View
Bedroom areas plan	Full	Full	Hidden	Full	Full	Full	Full
Dining areas plan	Full	Full	Full	Full	Full	Full	Full
REPORTING							
Reports	Full	Full	Full	Full	Full	Full	Hidden

DECIDING

Choosing the right role

When decidingwhichroletogiveacolleague,thefollowingquestions usually point to the answer:

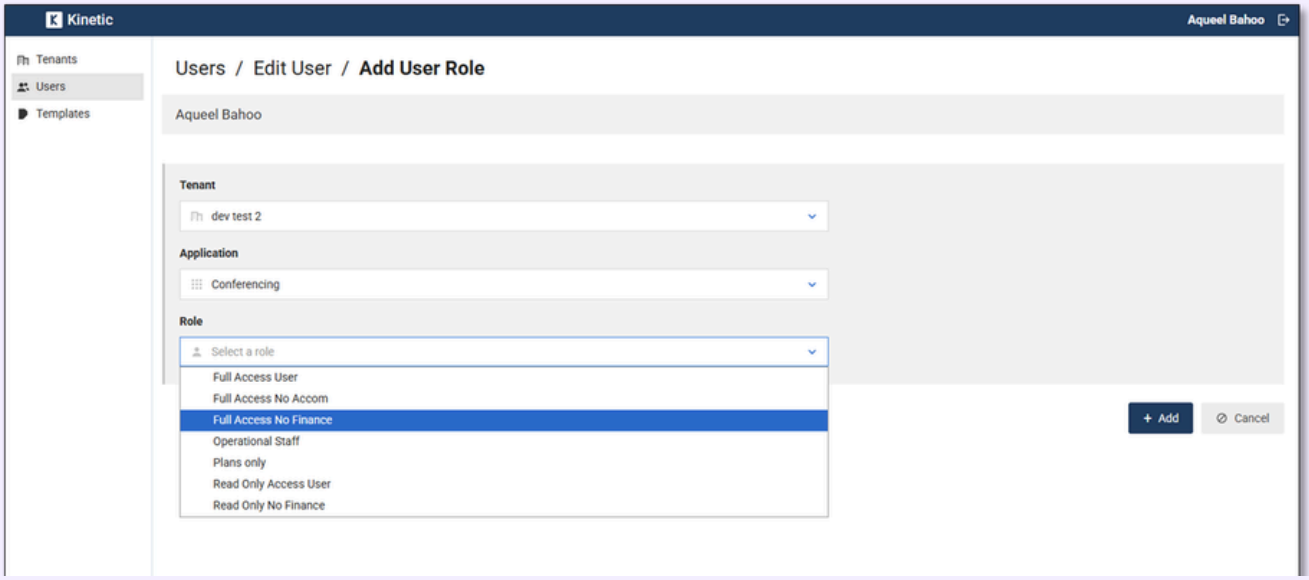
Do they need to see prices, quotes, deposits and invoices?
If not, a role with no finance or the Operational Staff role will be more appropriate.

Do they need to change bookings, or only look at them?
If they only need to read information, one of the view only roles protects your data while still giving them everything they need.

Do they deal with accommodation?
If bedrooms are managed elsewhere, the Full Access, No Accommodation role removes that area entirely.

Are they delivering the event rather than booking it?
Operational Staff gives delivery teams the detail they need to service the booking, and Plans Only suits colleagues who simply need to see what is on and where.

Roles are assigned to a user at the point of inviting them to use Conferencing on Pulse but the role can be amended as required. Your CX Manager, the KxSupport Team, Trainers and the Products Team can all make these amendments for you.



Conferencing on Pulse · Default user roles and permissions

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TALK TO US

Roles are assigned to each user in the system, and can be changed at any time.



If you would like to review who has which role, or discuss a requirement the default roles do not cover, please contact your **CX Manager** or **raise a request through the support team** and a member of the Products Team will reach out to discuss this with you.

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