Vision: Roles Breakdown

What are Roles?

Roles in Brandwise Vision enable users to access various functionality in Vision. Roles will never determine what data is returned in Vision reports, dashboards, or analyzers. There are six primary Roles that a user can be assigned in the system. These roles include; Admin, Prospect Admin, Sales Manager, Customer Service, Sales Rep Manager, and Sales Rep. Each role and their access levels are defined below.

Admin

The Admin Role has the ability to access four different menus in Vision. These tools are Home, Data Review, Data Mapping, and Administration. Most Admin users will access Home to upload Forms and Programs and the Administration area to manage users or run Push Alerts. The admin login also has the ability to edit the Vision Welcome Screen which serves as a landing page to users logging in to Vision. The Admin role is only assigned to the Admin user and cannot be assigned to any other users.

PAdmin

Prospect Admin is often referred to as the PAdmin. As an administrative role, the Prospect Admin has the ability to access the Prospect Admin, My Prospects and Group Prospects menus. This role is assigned to the user that will enter and manage prospects for the vendor as a whole. Prospect Admin is only assigned to the PAdmin user and cannot be assigned to any other users.

SalesMgr

The Sales Manager Role can access all the Sales role screens in Vision including the Home, Orders & Ships, Accounts, Reports, Analysis, Resources, Administration, Group Prospects, and 360° areas. Sections available uniquely to the Sales Manager Role include Analyzers and BPI Analysis under Analysis. Due to the ability of the Sales Manager Role to run analyzers, only internal staff to the vendor are assigned the Sales Manager role. External Reps or Rep Group Managers are never assigned a role of Sales Manager.

CustSvc

The Customer Service Role allows the Customer Service department to access the areas of Vision that allow them to assist with specific customer questions, but removes the ability for users to run sales reports. As an example, if a customer called in and said that they have only received half of the product they ordered, a user in the Customer Service role would have no problem finding the order and seeing which items shipped, what is on back order and what has been canceled off of the order. They would not, however be able to run a report that tells gives them year over year analysis for the company as a whole. Do to the lack of reporting capabilities, external sales force members such as outside Sales Reps or Rep Group Managers should not be assigned the Customer Service Role. This role is only assigned to internal staff members.

SalesRepMgr

The Sales Rep Manager Role has access all of the screens that a Sales Rep can access, but it also includes the ability to access the Administration and Group Prospects menu items in Vision. As the Administration and Group Prospects areas limit the information that is displayed according to the rep codes and their direct reports, Sales Rep Managers will only have access to usage information and prospecting information

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for their group. The Sales Rep Manager role can be assigned internally to a Regional Sales Manager that cannot access analyzers, or to externally to Rep Group Managers.

SalesRep

The Sales Rep Role can access all the Sales Areas in Vision. Sales Reps can run reports, view Dashboards, run Sales Capsules, view orders and ships, etc.

So if roles don't limit data availability what does?

While roles play no part in which users can see what information it is obvious that a Sales Rep should be limited to viewing only their own territory information and that a Sales Rep Manager needs to be able to see information for the Group that they manage. Furthermore, internal staff members typically can have access to companywide information or information on much grander scale than that of a Sales Rep Manager. How does the system determine what information is available to each user?

In the case of a Sales Rep it is very simple. Each Sales Rep has a Rep Code. That Rep Code is inserted against each account that belongs to the Sales Rep. With no one reporting to the Sales Rep, they will be limited to the information that pertains to the customers assigned to them. Rep Codes are defined in the user profile in the Admin login of Vision.

The Sales Rep can report to their Rep Group Manager. So while the Rep Group Manager will not have any accounts directly associated with them, they do have direct reports, or Sales Reps that are marked as reporting to their specific Rep Group Manager. Sales Rep Principles will be able to access any information that is assigned directly to them (with a Rep Code) as well as all of the information that is assigned to their Direct Reports.

The Direct Reports can be used all the way up the chain through the internal users at the vendor level. If the vendor has an internal Regional Sales Manager, direct reports of their region's Rep Group Managers would limit the information that is seen by the Regional Sales Manager to include only the information in their region.

It is possible to grant users a Master User status. The Master User status is only granted to internal staff members, but the Master User status will give users the ability to see all of the data in the system. Remember, roles grant access to menu items or pages while rep codes, direct reports, and master user status grants access to data. This means that a Master User does not have access to the Prospect Admin area and they cannot run Push Alerts, however companywide year over year analysis can be run by a user assigned one of the sales roles and is granted Master User status. If a user needs to access all orders and ships for the company, they need to be granted Master User status.