User Roles

This article applies to:

1. Go to Settings

2. Click Users

3. Click Add a User

4. Type the name and email of the user or partner you’d like to add. Partner emails will be validated to make sure they are a Keap Certified Partner
5. Select whether the user is an Admin, Limited Admin, Manager, or Staff

Note: All users, regardless of user role, can view SMS Messages on the Keap website and mobile app.

1. **Admin**: This role has full account permissions. Only give this role to trusted people.

2. **Limited Admin**: This role has admin access with the exception of account setup access and the ability to add admin users. Limited admins cannot create Advanced Automations, but can modify, publish, and unpublish Advanced Automations.

3. **Manager**: This role has permissions to do everything but manage users and merchant account information.

4. **Staff**: This role has limited access and can only view their own contacts, tasks, and deals assigned to them. Staff users cannot access Broadcasts, Advanced Automations, or Reports.

6. Click **Send user Invite**. This will send an email to the user inviting them to set up their username/password for the Keap App and they will have the Manager permissions.