

PERMISSIONS & ACCESS OVERVIEW

Nextl User Roles

A clear overview of how permissions are structured across Nextl so each user has the right level of access for their role.

This document is based on the original User Roles reference guide and has been rebuilt in the updated Nextl brand style for website use.



User role permissions overview

Nexl offers five distinct user roles, each designed to balance visibility, control, and day-to-day usability. This helps firms give the right users access to the right parts of the platform without adding unnecessary complexity.



Why roles matter

Role-based permissions help firms protect sensitive data, manage administrative access, and keep the user experience aligned to what each person actually needs to do.

How to read this guide

Start with the role summaries below, then use the permissions matrix to see which features are available across Restricted, Support, Individual, Manager, and Admin users.

At a glance

Restricted and Support roles are designed for controlled access, while Individual, Manager, and Admin roles progressively increase visibility, editing rights, and platform control.

ROLE SUMMARIES

The five Nexl user roles

Each role is built to suit a different level of platform involvement, from limited visibility through to full administrative control.

Restricted

Limited access to personal data only, designed for tightly controlled usage scenarios.

Support

View firm-wide data with no personal CRM features. Best suited to read-only support access.

Individual

Full personal CRM access with optional broader visibility depending on firm setup.

Manager

Broader visibility across firm data with the ability to add and manage selected records.

Admin

Complete platform control, including management features, configuration, and deletion rights where applicable.

PERMISSIONS MATRIX

Feature access by role

The matrix below reflects the original feature-by-feature access overview from the source document, rebuilt into a cleaner web format.

Feature	Restricted	Support	Individual	Manager	Admin
Meetings	✓	✓	✓	✓	✓
Reporting	✓	✓	✓	✓	✓
Data Export	—	—	✓	✓	✓
All Contacts	—	✓	—	✓	✓
All Activities	—	✓	—	✓	✓
My Contacts	✓	—	✓	✓	✓
All Prospects	—	✓	—	✓	✓
My Prospects	✓	—	✓	✓	✓
Stay-In-Touch	✓	—	✓	✓	✓
All Companies	—	✓	—	✓	✓

Feature	Restricted	Support	Individual	Manager	Admin
My Companies	✓	—	✓	✓	✓
Marketing Lists	—	✓	—	✓	✓
All Opportunities	—	✓	—	✓	✓
Delegate Access	—	—	✓	✓	✓
My Opportunities	✓	—	✓	✓	✓
Detailed Contact Info	—	✓	✓	✓	✓
Relationship Partners	—	✓	✓	✓	✓

Practical use

Individual users can work effectively with personal CRM features, while Manager and Admin roles are better suited to users responsible for broader team or firm-wide oversight.

ADMINISTRATIVE CONTROLS

Platform management features

A smaller set of controls is reserved for higher-permission roles to protect data integrity and configuration settings.

Feature	Restricted	Support	Individual	Manager	Admin
All Imports	—	—	—	✓	✓
Data Cleaner	—	—	—	✓	✓
Tag Management	—	—	—	✓	✓
User Management	—	—	—	✓	✓
Industry Management	—	—	—	✓	✓

Manager

Managers can access selected administrative tools that help maintain data quality and support team-level oversight.

Admin

Admins have the broadest level of control, including user, industry, tagging, import, and cleaning functions.

SHARED CAPABILITIES

Available to all roles

Some parts of the Nexl experience are available across every role to keep collaboration and core usability consistent throughout the platform.



Core shared features

Who Knows Who, Workspaces, Contact & Company Lists, Apps, Tasks, Personal Activity Feed, Outlook Add-In, and Custom Activities are available to all roles.

Why that matters

This keeps key collaboration and relationship workflows accessible across the firm, even when visibility and admin permissions differ by role.

Consistency across the platform

Shared access to core collaboration features helps firms drive adoption without needing every user to hold a higher-permission role.

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