

# Invite new users and assign roles in Zoho PageSense

In PageSense, you can invite new members to collaborate on different projects, and assign them various roles such as administrators, members, editors, and viewers. Defining specific roles to individuals in a project is specifically useful when there are multiple people working on the same project, and you decide to give specific permission levels for each member to easily manage and monitor workflows within a project.

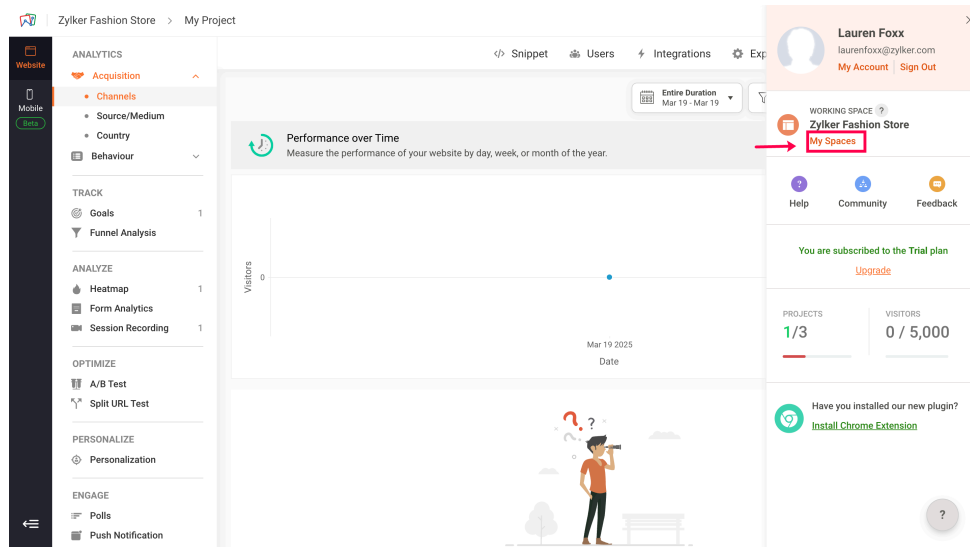
💡 For example, David is a stakeholder in your project. He's contributed a great number of ideas, and would like to help with the QA prior to the experiment going live, and to have access to the final results of the experiment. In this case, you can assign him the 'Viewer' role, so he can work with you to analyze the experiment's success, and help brainstorm iteration into new experiments. You can similarly choose the right access roles for your team members based on their expertise.

You can add or invite users in two ways:

- Invite a user to multiple projects within a space
- Invite a user to a particular project within a space.

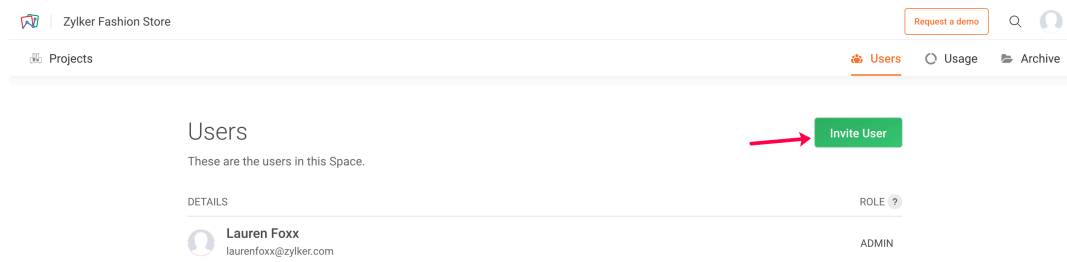
## To invite a user to multiple projects within a space:

1. Click the profile picture icon in the top-right corner and then the **My Spaces** button.



2. Select the Space (**My Spaces** or **Invited Spaces**) you want to add or invite your new users to.

3. Click **Users** on the top pane and then the **Invite User** button.



4. Enter the user's email address and assign a specific role to the user from the **Access Type** dropdown:

- **Admin** has full access to all projects and account billing information. A user who is an administrator of one space is also an administrator for all the projects within that space.
- **Members** have access to grant user permissions to individual projects in this space as follows:

- **Project owners** can create, edit, publish/launch, pause, and delete experiments. A project can have more than one project owner.
- **Editors** can create and edit paused experiments. They can also view results.
- **Viewers** can view experiments and their results.
- **No Access** can not view and access experiments within a specific project.

❖ [Check out the table below](#) to get a more detailed understanding of different types of roles and access privileges in Zoho PageSense.

📄 An editor can launch all the experiments that are a part of the *Track* and *Analyze* sections of Goals, Funnel Analysis, Heatmaps, Session Recording, and Form Analytics. However, they cannot launch any experiments from the *Optimize* section (Personalization, Push Notifications, Polls, Pop-ups and A/B + Split URL Test). Only the Project Owner has the permission to do this.

❖ Only the Project Admin can share the reports of all experiments, none of the other roles have the permission to do so.

5. Finally, click **Invite** to send the invitation email to the individual users. When they accept the invite, the user will be part of your space in PageSense.

Zylker Fashion Store

Request a demo



Projects

Users Usage Archive

## Users

These are the users in this Space.

Invite User

DETAILS	ROLE ?
 <b>Lauren Foxx</b> laurenfoxx@zylker.com	ADMIN
 <b>swarna@zylker.com</b> PENDING CONFIRMATION	MEMBER ⋮

## To invite a user to a particular project:

1. Click the profile picture icon in the top-right corner and choose the specific *Space* then *Project* you want to add new users to.

Zylker Fashion Store

Request a demo

Projects

Users Usage Archive

## Projects

A project holds all your experiments. View, create, and organize your projects here.

New Project

NAME	LIVE EXPERIMENTS ?
<b>Zylker Marketing</b> Created by Lauren Foxx on Mar 19, 2025 20:25 PM	-
<b>My Project</b> Created by Lauren Foxx on Mar 19, 2025 17:17 PM	3 / 3

?

2. Click **Users** on the top pane and then the **Invite User** button.

Zylker Fashion Store > My Project



Request a demo

Snippet Users Integrations Experiment Settings Project Settings

## Users

These are the users in this Project.

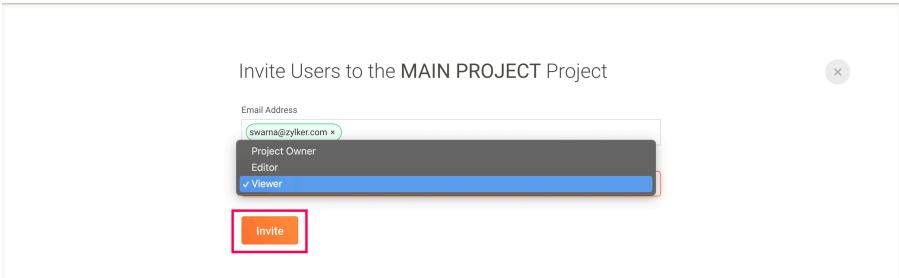
Invite User

DETAILS	ROLE ?
 <b>Lauren Foxx</b> laurenfoxx@zylker.com	ADMIN
 <b>swarna@zylker.com</b> PENDING CONFIRMATION	EDITOR ⋮

3. Enter the user's email address and assign a specific role to the user from the *Access Type* dropdown:

- **Project owners** can create, edit, publish, and pause experiments. A project can have more than one project owner.
- **Editors** can create and edit paused experiments. They can also view results.

- **Viewers** can preview experiments and view results.



❗ Check out the table below to get a more detailed understanding of **different types of roles and access privileges** in Zoho PageSense.

4. Finally, click **Invite** to send the invitation email to the individual users. When they accept the invite, the user will be part of your project in PageSense.

Different types of roles and access privileges in Zoho PageSense

PROJECTS	SPACE ADMIN	OWNER	EDITOR	VIEWER
Create a project	Yes	No	No	No
View projects	Yes	Yes	Yes	Yes
Edit Projects	Yes	Yes	No	No
Delete projects	Yes	Yes	No	No

EXPERIMENTS	SPACE ADMIN	OWNER	EDITOR	VIEWER
Create an experiment	Yes	Yes	Yes	No
View experiments	Yes	Yes	Yes	Yes
Edit experiments	Yes	Yes	Yes	No
Delete experiments	Yes	Yes	No	No
Duplicate experiments	Yes	Yes	No	No
Publish/Launch experiments	Yes	Yes	No	No

VARIATIONS	SPACE ADMIN	OWNER	EDITOR	VIEWER
Create a variation	Yes	Yes	Yes	No
View variation	Yes	Yes	Yes	Yes
Edit variation	Yes	Yes	Yes	No
Delete variation	Yes	Yes	Yes	No
Duplicate variation	Yes	Yes	Yes	No

AUDIENCE	SPACE ADMIN	OWNER	EDITOR	VIEWER
Create an audience	Yes	Yes	Yes	No
View audiences	Yes	Yes	Yes	Yes
Edit audiences	Yes	Yes	Yes	No
Delete audiences	Yes	Yes	Yes	No

REPORTS	SPACE ADMIN	OWNER	EDITOR	VIEWER
View reports	Yes	Yes	Yes	Yes
Share reports	Yes	No	No	No

EVENT TIMELINE	SPACE ADMIN	OWNER	EDITOR	VIEWER
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View experiment activity timeline	Yes	Yes	Yes	Yes
View project activity timeline	Yes	Yes	Yes	Yes

INTEGRATIONS	SPACE ADMIN	OWNER	EDITOR	VIEWER
Create project integration	Yes	Yes	No	No
View project integration	Yes	Yes	Yes	Yes
Delete project integration	Yes	Yes	No	No

USERS	SPACE ADMIN	OWNER	EDITOR	VIEWER
Create project user role	Yes	Yes	No	No
View project user role	Yes	Yes	Yes	Yes
Edit user project role	Yes	Yes	No	No
Delete project user role	Yes	Yes	No	No
Portal user management	Yes	No	No	No

We hope this documentation helps make the process easy for you. Please feel free to reach out to us anytime by dropping an email to [support@zohopagesense.com](mailto:support@zohopagesense.com) if you need more explanation or have any questions.