

# How to grant access to automation

## Step 1 : Give advanced user rights

See "[How to create a user account](#)".

### **i** Advanced user rights (i.e. with automation)

Customize the user's accesses for Master      Activate the same permissions as

<input checked="" type="checkbox"/> <b>Campaigns</b> <ul style="list-style-type: none"><li><input checked="" type="checkbox"/> Create, send, view and manage campaigns</li><li><input checked="" type="checkbox"/> Marketing templates<ul style="list-style-type: none"><li><input type="checkbox"/> Can only edit template drafts</li><li><input checked="" type="checkbox"/> Can edit and publish templates</li></ul></li></ul>	<input checked="" type="checkbox"/> <b>Contacts</b> <ul style="list-style-type: none"><li><input checked="" type="checkbox"/> Create and manage contact lists</li><li><input checked="" type="checkbox"/> Segmentation</li></ul>
<input type="checkbox"/> <b>Transactional</b> <ul style="list-style-type: none"><li><input type="checkbox"/> SMTP or API setup (credentials)</li><li><input type="checkbox"/> Set up alerts with Real-Time Monitoring</li><li><input type="checkbox"/> Transactional templates<ul style="list-style-type: none"><li><input type="checkbox"/> Can only edit template drafts</li><li><input type="checkbox"/> Can edit and publish templates</li></ul></li></ul>	<input type="checkbox"/> <b>Account Management</b> <ul style="list-style-type: none"><li><input type="checkbox"/> Billing</li><li><input type="checkbox"/> Account setup</li></ul>
<input checked="" type="checkbox"/> <b>Automation</b> <ul style="list-style-type: none"><li><input checked="" type="checkbox"/> Create, activate, view and manage automation workflows</li><li><input checked="" type="checkbox"/> Automation templates<ul style="list-style-type: none"><li><input type="checkbox"/> Can only edit template drafts</li><li><input checked="" type="checkbox"/> Can edit and publish templates</li></ul></li></ul>	<input checked="" type="checkbox"/> <b>Additional template library management restrictions</b> <ul style="list-style-type: none"><li><input checked="" type="checkbox"/> Cannot create, edit or delete labels</li><li><input checked="" type="checkbox"/> Cannot lock or unlock sections</li></ul>

## Step 2: Export templates to automation templates

Go to the same sub-account of the user interested in automation (e.g. F\_COMMUNICATION) :

- **export the template to automation templates** so that people from the sub account have access (cf. [How to create a template](#))