

Configure Custom Roles in Matterport

Description

Custom Roles allow Enterprise customers to precisely control what users can see and do within a Matterport account. In addition to the default roles—such as Collaborator, Administrator, Billing Contact, and Account Owner—you can create tailored roles that align with your operational structure, compliance requirements, and workflow controls.

What Custom Roles Enable

Custom Roles let you:

- Define granular permission sets (e.g., allow ordering Schematic Floor Plans but restrict other add-ons).
- Control editing capabilities in Workshop.
- Limit who can externally share Spaces.
- Separate upload permissions from administrative access.
- Apply permissions at either the Organisation level or specific folder/Space level.

This ensures least-privilege access control while maintaining operational flexibility.

How Custom Roles Work

When creating a role, you:

- 1. Select permissions**
Combine Organisation and Space-level permissions to match specific responsibilities.
- 2. Define scope**
 - **Organisation Role** — Applies across all Folders, Spaces, and Users in the account.
 - **Space Role** — Applies only to designated Folders or Spaces.
- 3. Assign the role**
Roles can be assigned to:
 - Individual users
 - User groups

Every user must have at least one Organisation-level role.

Multiple Roles and Permission Aggregation

If a user holds more than one role (e.g., through multiple user groups or a combination of Organisation and Space roles), permissions are cumulative. The system grants the highest level of access allowed across all assigned roles.

For example:

- An Organisation role permitting CAD ordering and Workshop editing
- A Folder-level role permitting BIM ordering and Space Detail editing

Within that folder, the user can perform all combined actions. Outside that folder, only Organisation-level permissions apply.

This additive model simplifies complex access scenarios while avoiding conflicts.

Enabling Custom Roles

Only the **Account Owner** can activate this feature:

1. Log in to my.matterport.com
2. Navigate to **Settings** â†’ **Account** â†’ **Advanced Admin Settings**
3. Enable **Custom Roles and User Groups**

Once enabled, the feature remains active unless deactivated by Support. No changes occur until roles are created and assigned.

Creating a Custom Role

Users with Administrator accessâ€™ or those granted Custom Roles Management permissionsâ€™ can create roles:

1. Go to **Users**
2. Choose **Organisation Roles** or **Space Roles**
3. Click **+ New Role**
4. Name and describe the role clearly
5. Set the role scope (Organisation or Space)
6. Select relevant permissions
7. Save

Tip: To delegate role management, ensure the role includes the **User Management** permission.

Assigning Custom Roles

Organisation Roles can be assigned:

- Directly to users
- To user groups (recommended for scalability)

Space Roles can be assigned:

- From a specific Space or Folder (Share & Invite)
 - From an individual userâ€™s access page
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- From a user group's access settings
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Summary

Custom Roles in Matterport Enterprise accounts provide structured, scalable permission control. By defining precise permission sets and leveraging role aggregation, Organisations can enforce governance, improve workflow efficiency, and maintain security across large user bases.

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