

Create custom roles for your team

Team and account

Custom roles give each teammate exactly the access their job needs. The most common one is a Reviewer: someone who writes, edits and translates articles but can never change what readers see, so an editor checks and publishes their work.

Who can do this: Owners and Admins · **Plans:** Catalyst

Create a Reviewer role

The Reviewer is ready to use, so this takes a few clicks.

1. In the left menu, click the gear icon, then **Users**.
2. In the **Roles** panel, click **New Reviewer role**.
3. Check the **Name**, and add a **Description** if you like, for example "Writes and translates articles. An editor publishes them." The description shows next to the role wherever you assign it.
4. Click **Create role**.

User Management

5 members · 0 pending invitations

Invite user

Team members5

Search members...

MC

Maya Chen

You

maya@northwind.example

Owner

DO

Daniel Okafor

daniel@northwind.example

Admin

PR

Priya Raman

priya@northwind.example

Editor

LW

Lukas Weber

lukas@northwind.example

Translator

SA

Sofia Alvarez

sofia@northwind.example

Viewer

Roles0

New Reviewer role

Start from scratch

No custom roles yet

Built-in roles

Pending invitations0

1

In the **Roles** panel, click **New Reviewer role**

The Reviewer comes with writing and translating on, and Publish off.

A Reviewer can read content, create, edit and translate articles, manage review flags, upload images and files, and read and write internal notes. Nothing in it can make a change visible to readers.

Create a role from scratch

1. In the **Roles** panel, click **Start from scratch**.

2. Enter a **Name** (2 to 64 characters). It can't be the name of a built-in role, such as Editor.
3. Tick the permissions the role needs. They are grouped under **Authoring**, **Publication**, **Organization** and **Collaboration**.
4. Read **What this role can do** at the bottom. It lists the permissions you picked and says whether the role can make changes visible to readers.
5. Click **Create role**.

To start from a role you already have, click **Duplicate** next to it. The copy is a new role, so people using the original aren't affected. A help center can have up to 25 custom roles.

The permissions

Permission	What it allows
Read content	Open the dashboard's content and previews. Every other permission needs it.
Create articles	Create new articles. A new article always starts unpublished.
Edit articles	Edit articles in your default language. Without Publish , edits to a live article are saved as staged changes for review.

Translate articles	Edit articles in your other languages. Releasing a translation to readers needs Publish .
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Manage review flags	Flag articles for review and set review dates. A flag is a reminder, not an approval to publish.
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Upload media	Add new images and files.
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Publish	Make content visible to readers: publish articles, update live ones, publish staged changes, release translations and schedule releases.
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Unpublish	Take a live article or a released language offline.
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Restore content	Restore deleted articles and older versions. Restoring something readers can see also needs Publish .
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Organize change sets	Create and organize open change sets. Publishing or scheduling a set needs Publish .
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Delete articles	Move articles to the Trash. Deleting a live article also needs Unpublish .
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Change visibility and sharing

Change who can see an article or category.

Manage categories

Create categories and change where they sit.

Manage shared media

Replace or delete images and files. Needs **Upload media**.

Read internal notes

Read your team's internal notes.

Write internal notes

Add and reply to internal notes. Needs **Read internal notes**.

Export content

Export the content this person can already read.

View analytics

See your help center's statistics.

Categories and visibility have no draft to review, so the permissions under **Organization** change what readers see straight away. Each of them also needs **Publish** whenever the change would reach readers.

When one permission needs another, the role editor says which one is missing, for example "**Read content** is needed by Edit articles". It never adds a permission for you,

so **Edit articles** never quietly brings **Publish** with it.

What only built-in roles can do

Some work stays with the built-in roles, whatever a custom role includes: managing users, roles, settings, API keys and billing, designing the help center in the template editor, moderating reader comments, and emptying the Trash.

Give someone a custom role

- **A teammate already on the team:** pick the role in the dropdown next to their name under **Team members**.
- **Someone new:** click **Invite user** and choose the role under **Role**. See [Invite your team](#).

User Management

5 members · 0 pending invitations

[Invite user](#)

Team members 5

Search members...

MC	Maya Chen You maya@northwind.example	Owner
DO	Daniel Okafor daniel@northwind.example	Admin
PR	Priya Raman priya@northwind.example	Editor
LW	Lukas Weber lukas@northwind.example	Translator
SA	Sofia Alvarez sofia@northwind.example	Viewer

Roles 1

[New role](#) [Start from scratch](#)

Reviewer USES A SEAT	Writes and translates articles. An editor publishes them. · 0 members · 8 permissions	Edit	Duplicate	Delete
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► Built-in roles

Pending invitations 0

"Reviewer" created

5 Click Create role

A new role applies straight away.

Each person has one role per help center. Custom roles belong to the help center you create them in, so on another help center you create them again.

How a Reviewer's work gets published

A Reviewer never sees a **Publish** button. In the article editor:

- A new article stays a **Draft** until someone who can publish publishes it.
- On a live article, **Save draft** saves the edits as staged changes, and the editor shows **Saved for review**. Readers keep seeing the published version.

An Editor, Admin or Owner then opens the article, checks the staged changes and clicks **Publish changes**. See [Edit live articles safely with staged changes](#).

The same limits apply everywhere the person works. An AI assistant they connect by signing in can do only what their role allows, so a Reviewer's assistant can't publish either. See [Connect Claude, ChatGPT and other AI agents](#).

Edit or delete a role

- **Edit:** click **Edit** next to the role, change it and click **Save changes**. The editor tells you how many people the change affects. It applies to all of them straight away.
- **Delete:** click **Delete**, then **Delete role**. You can only delete a role nobody uses, so first move its members and pending invitations to another role.

The built-in roles (Owner, Admin, Editor, Translator and Viewer) are listed under **Built-in roles** for comparison. They can't be changed or deleted. See [Roles and permissions](#).

If your help center leaves the Catalyst plan, your custom roles and who has them are kept, but everyone with a custom role can only read content, internal notes and statistics, and export content. Nobody is moved to a built-in role. Their full access comes back when you return to Catalyst.

Troubleshooting

"Somebody else changed this role while you were editing it." Another Owner or Admin saved the role first. Close the editor, open the role again and make your change.

Delete is greyed out. Someone still has the role, or a pending invitation uses it. Give them another role first.

New Reviewer role is greyed out. Your help center isn't on the Catalyst plan, or it already has 25 custom roles.

A Reviewer can't find their staged changes on the help center. That's expected: staged changes are hidden from readers until someone publishes them.

Related articles

- [Roles and permissions](#)
- [Invite your team](#)
- [Change someone's role or remove them](#)
- [Edit live articles safely with staged changes](#)
- [Flag articles for review](#)