Who can see and do what

The four organisation permissions and the two tribe permissions, what each one unlocks, and why financial reviews and financial documents sit behind a separate gate.

Compliance has four permissions. They are set per role, under your organisation settings, the same way as every other module.

Permission	What it allows
View Compliance	Read the Overview, the lists, the tribe and franchisee profiles and past reports. Change nothing.
Conduct Compliance	Schedule and conduct checks, review submissions, lodge and review documents, raise and close actions.
Manage Compliance	Everything above, plus Compliance Settings — checklist templates, document types and schedules. Includes deleting. It does not include financial access.
View Financial Compliance	See financial reviews and financial documents. Nobody without it can see them at all, and it is never granted by any of the groups above — add it as well.

Why finance is separate

A franchisee's profit and loss statement is not the same kind of information as a photograph of their signage. A business advisor may need to run brand audits across twenty tribes without ever seeing what any of them earns.

So a checklist template or a document type can be marked **Financial**. Everything filed against it then requires **View Financial Compliance** — not just to open it, but to see that it exists. It is left out of the lists, the counts on the Overview and the tribe profile.

> **ARCHIVING A FINANCIAL TEMPLATE DOES NOT OPEN IT UP**
> A financial checklist template that is archived keeps its records hidden. The gate follows the template even after it is taken out of use, so tidying up the settings page can never expose old audits.

The tribe permissions

A franchisee reaches Compliance from their own tribe, and what they can do there is set by two tribe permissions. They are granted per tribe role, under the tribe's Tribe Administrators settings, the same way as every other tribe module.

Tribe permission	What it allows
View Tribe Compliance	Open Compliance on the tribe: the To do, the tribe's own checks and reports, its documents, its actions and the notes shared with it. Change nothing.
Edit Tribe Compliance	Everything above, plus completing checklists and self-assessments, taking photographs, signing off a visit, lodging documents, starting and completing actions, replying to requests and adding notes.

THE APPLICATION HAS TO BE ON FOR TRIBES

Compliance appears in a tribe's menu only when the application is enabled for tribes under your organisation's Applications settings, and the person holds View Tribe Compliance. If your organisation has customised the tribe menu, add Compliance under Organisation Settings, then Tribe Customisation Menus, or it stays off the sidebar even for people who hold the permission.

What a tribe sees

A tribe sees only its own records. It never sees another tribe, the Overview, the schedules or the settings, and nothing filed against a **Financial** checklist template or document type reaches it at all — not the review, not the actions raised from it, not the notes on those actions.

Whether the tribe sees the score on a completed check is a setting on the checklist template itself — **Show the score to the franchisee**, which is on by default. Switched off, the tribe still sees every item and whether the check passed, just not the number. Some brands share the number, some prefer the conversation.

Notes are separate. Any note added against a check, a document or an action can be marked **Private**, which keeps it off the tribe's screen while leaving it on the record for the next advisor. Everything a tribe writes is visible to you.

A tribe cannot delete anything. The one exception is a photograph it has just added to a checklist it is still completing; once the check is submitted, the evidence stays.

A sensible starting set

Role	Give them
Business advisor	Conduct Compliance
Operations manager	Manage Compliance
Finance team	Manage Compliance and View Financial Compliance
Leadership, read only	View Compliance