Rovo: Permissions and Safety

Rovo and AI · https://mriacrm.com/docs/rovo-permissions-and-safety/

For admins: what the assistant may do

The Mria CRM Assistant and every agent built on Mria CRM's tools in Rovo Studio follow the same rules. Four independent layers decide what can happen.

1. The four layers

Layer	What it guarantees
The asking user's own permissions	The agent acts as the person in the chat. It can see and change only what that person could in Mria CRM, so two people asking the same question can get different answers.
Rovo's review card	Every create, update and bulk change is shown with its exact values and runs only after the user confirms it. The card is part of Rovo, so no prompt can skip it.
Changes are opt-in	A kind of change is unavailable to agents until Mria CRM deliberately opens it. Anything not yet opened is refused, whatever the agent is told.
No deletion	No agent tool can delete anything in Mria CRM. Deleting is done in the app.

Changes also need an active Mria CRM license, as they do in the app.

2. Roles decide, not the agent

There is no separate permission for Rovo. Grant or remove access in Roles & Permissions exactly as for the regular interface:

The user has…	The assistant…
No Mria CRM role	Refuses every CRM question: each read comes back “permission denied”.

The user has…	The assistant…
A role that can view Leads only	Answers questions about Leads; refuses Deals, Contacts and Companies.
View but not Edit on Leads	Answers questions, prepares the change — and the change is refused after confirmation. Confirming does not grant a right.
Full rights	Reads and changes everything that role allows, still with confirmation.

3. Text hidden in your data

A note, an email or a field value could contain text written to steer an AI — “ignore your instructions and…”. The layers above limit what such text can achieve to what the user is allowed to do and what the user confirms on the review card. Tell users to read the card, especially when a change was not what they asked for.

4. What is recorded

- Every change appears on the record's timeline under the user who confirmed it.
- Bulk changes to Leads are recorded on each Lead but send no notifications.
- Conversations are kept in the user's Rovo chat history, under Atlassian's Rovo data policies.

5. Turning it on and off

Rovo itself — chat, agents and Studio — is switched on or off by your Atlassian organization admins. Who may build agents in Studio is also an Atlassian setting. Inside Mria CRM there is nothing to configure: a user without a CRM role gets nothing from the assistant.

Related Pages

- Roles & Permissions — the roles the assistant respects.
- Rovo: Finding Information — questions across leads, deals, contacts, companies and products.
- Rovo: Creating and Updating Records — new records, edits, notes, tasks, conversions and closing deals.
- Rovo: Bulk Changes to Leads — one change on many leads, and the limits that apply.

- Rovo: Complex Requests Step by Step — real multi-step conversations, from triage to a closed deal.
- Rovo Studio: Build Your Own Agent — use the same CRM tools in an agent you design.