



GUIDE DOCUMENTATION - MODULR PORTAL

# User Permissions

What the different user roles allow users to do in the Modulr Portal



March 2023

# Contents

**This guide explains which actions users can perform in the Modulr Portal depending on their role.**

## 'Partner' users

Partner user roles follow the same rules as the ones described on this page, except Partner Admins and Admin+Approvers can **create** Customers.

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- 'User' role.....5
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# View

## Customers

View a Customer

Find a Delegate

*(Delegates can't link to other Delegates so don't have the 'Customer' permission)*

## Rules

View rules on an account

## Accounts

View an account

View transactions

Download proof of account

Download statements

## Reports

Download reports (transactions and user activity)

## Beneficiaries

View beneficiaries

View unapproved beneficiaries

## Notifications

View notification settings

*(Notifications not available to delegates)*

## Payments

View pending and error payments

## View + Approver

### Customers

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View beneficiaries

View unapproved beneficiaries

Approve/reject beneficiaries

### Notifications

View notification settings

*(Notifications not available to delegates)*

### Payments

View pending and error payments

Approve/reject payments

## User

### Customers

View a Customer

Find a Delegate

Grant access to a delegate

Revoke access to a delegate

*(Delegates can't link to other Delegates so don't have the 'Customer' permission)*

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Create new rules

Edit rules

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View transactions

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### Beneficiaries

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View unapproved beneficiaries

Create Beneficiaries

Delete Beneficiaries

### Notifications

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View pending and error payments

## User + Approver

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Revoke access to a delegate

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Edit rules

Delete rules

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Edit account alias

### Reports

Download reports (transactions and user activity)

### Beneficiaries

View beneficiaries

View unapproved beneficiaries

Approve/reject beneficiaries

Create Beneficiaries

Delete Beneficiaries

### Notifications

View notification settings

*(Notifications not available to delegates)*

### Payments

View pending and error payments

Approve/reject payments

## Admin

### Customers

View a customer

Find a delegate

Grant access to a delegate

Revoke access to a delegate

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### Rules

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Edit rules

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View transactions

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Download statements

Add a new account

Edit account alias

### Reports

Download reports (transactions and user activity)

### Beneficiaries

View beneficiaries

View unapproved beneficiaries

Create Beneficiaries

Delete Beneficiaries

### Notifications

View notification settings

Turn on notifications

Change notification settings

Turn off notifications

*(Notifications not available to delegates)*

### Payments

View pending and error payments

Make payments

Cancel payments

### Users

View users / user

Create new user

Edit user

Remove user

## Admin + Approver

### Customers

View a customer

Find a delegate

Grant access to a delegate

Revoke access to a delegate

*(Delegates can't link to other Delegates so don't have the 'Customer' permission)*

### Accounts

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View transactions

Download proof of account

Download statements

Add a new account

Edit account alias

### Beneficiaries

View beneficiaries

View unapproved beneficiaries

Create Beneficiaries

Delete Beneficiaries

Approve/reject beneficiaries

### Payments

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Make payments

Cancel payments

Approve/reject payments

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Create new rules

Edit rules

Delete rules

### Reports

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### Notifications

View notification settings

Turn on notifications

Change notification settings

Turn off notifications

*(Notifications not available to delegates)*

### Users

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Create new user

Edit user

Remove user





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