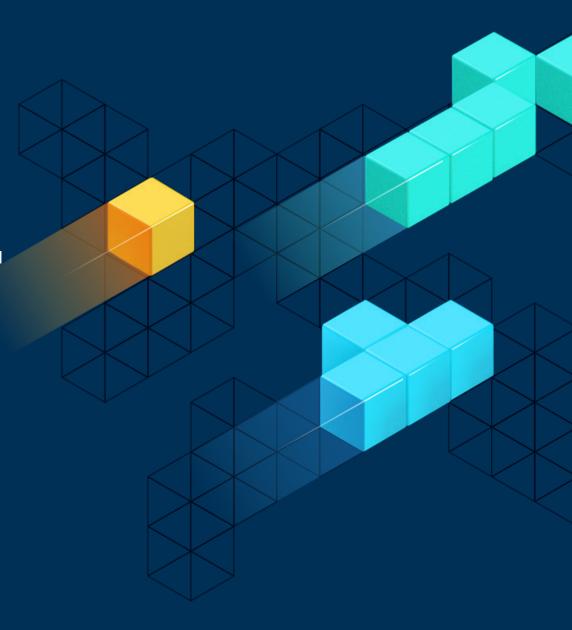


GUIDE DOCUMENTATION - MODULR PORTAL

User Permissions

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





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.

View role
'View' + Approver role
'User' role
'User' + Approver role
'Admin' role
'Admin' + Approver role



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 Payments View pending and error payments	Notifications View notification settings (Notifications not available to delegates)



View + Approver

Customers	Rules
View a Customer	View rules on an account
Find a Delegate	
(Delegates can't link to other Delegates so don't have the	
'Customer' permission)	
Accounts	Reports
View an account	Download reports (transactions and user activity)
View transactions	
Download proof of account	
Download statements	
Beneficiaries	Notifications
View beneficiaries	View notification settings
View unapproved beneficiaries	(Notifications not available to delegates)
Approve/reject beneficiaries	
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)	Rules View rules on an account Create new rules Edit rules Delete rules
Accounts View an account View transactions Download proof of account Download statements Edit account alias	Reports Download reports (transactions and user activity)
Beneficiaries View beneficiaries View unapproved beneficiaries Create Beneficiaries Delete Beneficiaries Payments View pending and error payments	Notifications View notification settings (Notifications not available to delegates)



User + 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)	Rules View rules on an account Create new rules Edit rules Delete rules
Accounts View an account View transactions Download proof of account Download statements 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 (Delegates can't link to other Delegates so don't have the 'Customer' permission)	Rules View rules on an account Create new rules Edit rules Delete rules
Accounts View an account View transactions Download proof of account 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

Accounts Nieuwan account Devembered management (two positions and vege activity)
View an account Download reports (transactions and user activity) View transactions
Download proof of account
Download statements
Add a new account
Edit account alias
Beneficiaries Notifications
View beneficiaries View notification settings
View unapproved beneficiaries Turn on notifications
Create Beneficiaries Change notification settings
Delete Beneficiaries Turn off notifications
Approve/reject beneficiaries (Notifications not available to delegates)
Payments Users
View pending and error payments View users / user
Make payments Create new user
Cancel payments Edit user
Approve/reject payments Remove user



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