Modulr

Delegate linking

Allowing a Delegate to access accounts on a
Customer's behalf
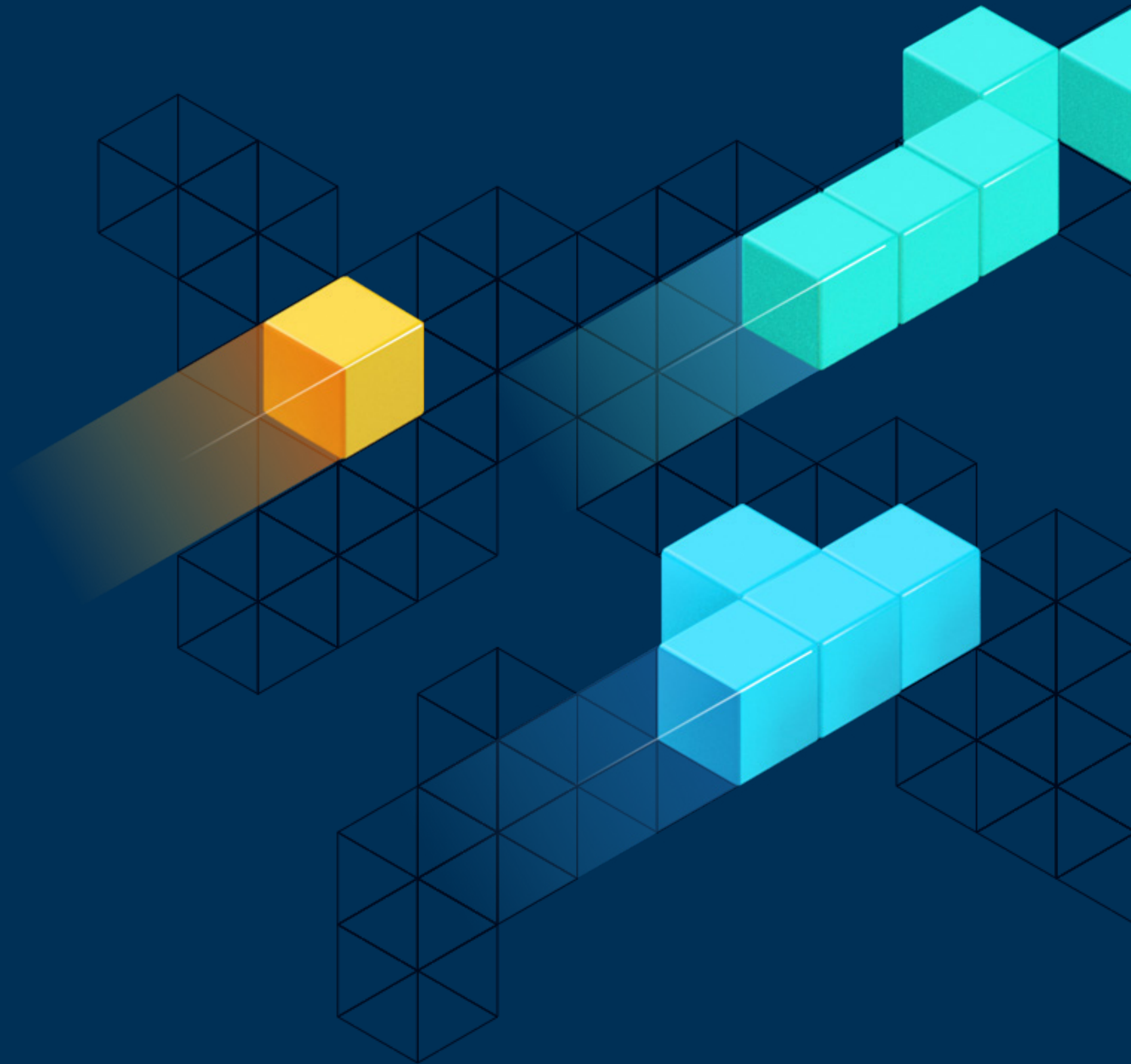
Granting access to a Delegate

View "Delegate access"

Modulr

Busy Business Ltd ⓘ   Lucy D'Zouza 👤

Accounts

Pending payments

Beneficiaries

Approvals

Reports

Users

Notifications

Users **Delegates**

You can give Delegate access to a service provider to manage
your accounts on your behalf.

Delegate's reference number

Enter Delegate's reference number

This is your Delegate's reference number which they will find
by selecting their Delegate name in the top right of their
portal, next to their profile.

Form for linking a
Delegate

Delegate's postcode

Enter Delegate's postcode

Find

About Modulr

Busy Business Ltd ⓘ   Lucy D'Zouza 👤

Modulr

- 🗐 Accounts
- ⚡ Pending payments
- 🏢 Beneficiaries
- ⊘ Approvals
- 📋 Reports
- 👥 **Users**
- 🔔 Notifications

Users   **Delegates**

You can give Delegate access to a service provider to manage your accounts on your behalf.

Delegate's reference number

32324345565676

This is your Delegate's reference number which they will find by selecting their Delegate name in the top right of their portal, next to their profile.

Delegate's postcode

BG12 8HU

Find

🗐 About Modulr

User enters information

Find button looks up ID and postcode combination for match

Modulr

Busy Business Ltd ⓘ   Lucy D'Zouza 👤

- Accounts
- Pending payments
- Beneficiaries
- Approvals
- Reports
- **Users**
- Notifications

Users **Delegates**

You can give Delegate access to a service provider to manage your accounts on your behalf.

Delegate's reference number

```
3245535255325
```

This is your Delegate's reference number which they will find by selecting their Delegate name in the top right of their portal, next to their profile.

Delegate's postcode

```
BG12 8UH
```

Delegate's address

James & Son accountants
12 Locklear Way
Biggleswade
BG12 8UH

← Name and address details of delegate that matches the entered details

[Change] ← Goes back to default form

Role

Admin ▼ ← Select role to give Delegate

Access to all features

✓ I confirm I'm authorising this Delegate to access and manage accounts on the business's behalf. ← Agree to authorisation
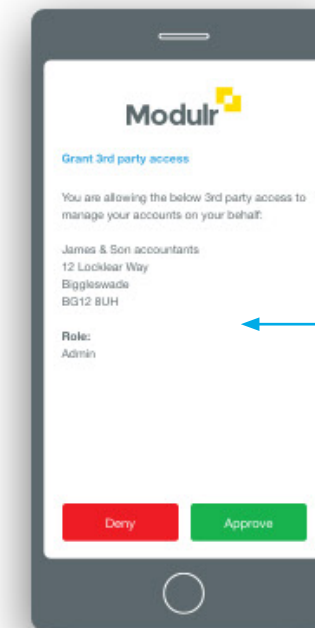
Grant access ← User checks details and clicks Grant Access button

Authenticate using Authy app

Follow the instructions on your phone when you receive a message from Authy.
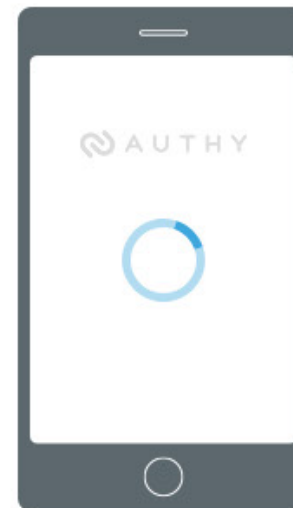
No message on your phone?
Make sure you have installed and registered the Authy app.

Granting access requires an Authy interaction

☑ **DELEGATE ACCESS GRANTED**

✕

Users **Delegates**

You have given the below Delegate access to manage your accounts on your behalf:

Delegate's address

James & Son accountants
12 Locklear Way
Biggleswade
BG12 8UH

Delegate's reference number

3245535255325

Role

Admin

Access to all features

Revoke access

Accounts

Pending payments

Beneficiaries

Approvals

Reports

Users

Notifications

Success message

Next time the **Delegate** signs in, they will see this customer's accounts in their Delegate view.

The **Delegate's** view

Customers

Modulr

XYZ Accounting • Lucy D'Zouza

Dashboard

Customers

Users

Customers

Search

Search for customer name or ID | Go

Customer name	ID	Type	Address
Busy Business Ltd	000000002	Limited Company	1 Welcome Court, Dewsbury, London W4 8UH

About Modulr

When Delegate signs in, they will the see the new customer that has linked to them in their customers list.

If access is revoked by the customer, the delegate will no longer see the customer in this list (on new sign in).

Modulr

Revoking a Delegate's access

Busy Business Ltd ⓘ   Lucy D'Zouza 👤

Modulr

- Accounts
- Pending payments
- Beneficiaries
- Approvals
- Reports
- **Users**
- Notifications

Users **Delegates**

You have given the below Delegate access to manage your accounts on your behalf:

Delegate's address

> James & Son accountants
> 12 Locklear Way
> Biggleswade
> BG12 8UH

Delegate's reference number

> 3245535255325

Role

> Admin

Access to all features

Revoke access ← Select Revoke access to remove the Delegate's access to the customer's accounts

Modulr

Busy Business Limited ⓘ   Lucy D'Zouza 👤

Accounts

Pending payments

Beneficiaries   Users   **Delegates**

Approvals   You have given the below Delegate access to manage your
                                 accounts on your behalf:
Reports

Users   Delegate's address   Displays name
                                                                       and address of
Notifications   James & Son accounta   Delegate user is
                                 12 Locklear Way   revoking
                                 Biggleswade
                                 BG12 8UH

Revoke access?

Are you sure you want to revoke access of the below Delegate
to your accounts?

James & Son accountants
12 Locklear Way
Biggleswade
BG12 8UH

Delegate's reference nu

The Delegate's access will be revoked the next time they sign in.

3245535255325

Role   **Yes, revoke access**   Revoke removes
                                                                       Delegate access
                                                                       to the customer's
Admin   accounts

Cancel

Access to all features

About Modulr

Revoke access   Cancel dismisses
                                 confirm box,
                                 returns to
                                 previous screen

⊘ ACCESS REVOKED ✕

Accounts

Pending payments

Beneficiaries

Approvals

Reports

Users

Notifications

Users **Delegates**

You can give Delegate access to a service provider to manage your accounts on your behalf.

Delegate's reference number

Enter Delegate's reference number

This is your Delegate's reference number which they will find by selecting their Delegate name in the top right of their portal, next to their profile.

Delegate's postcode

Enter Delegate's postcode

Find

Show success message

Page returns to it's original view

About Modulr

Next time the **Delegate** signs in, they will no longer see this customer's accounts in their Delegate view.