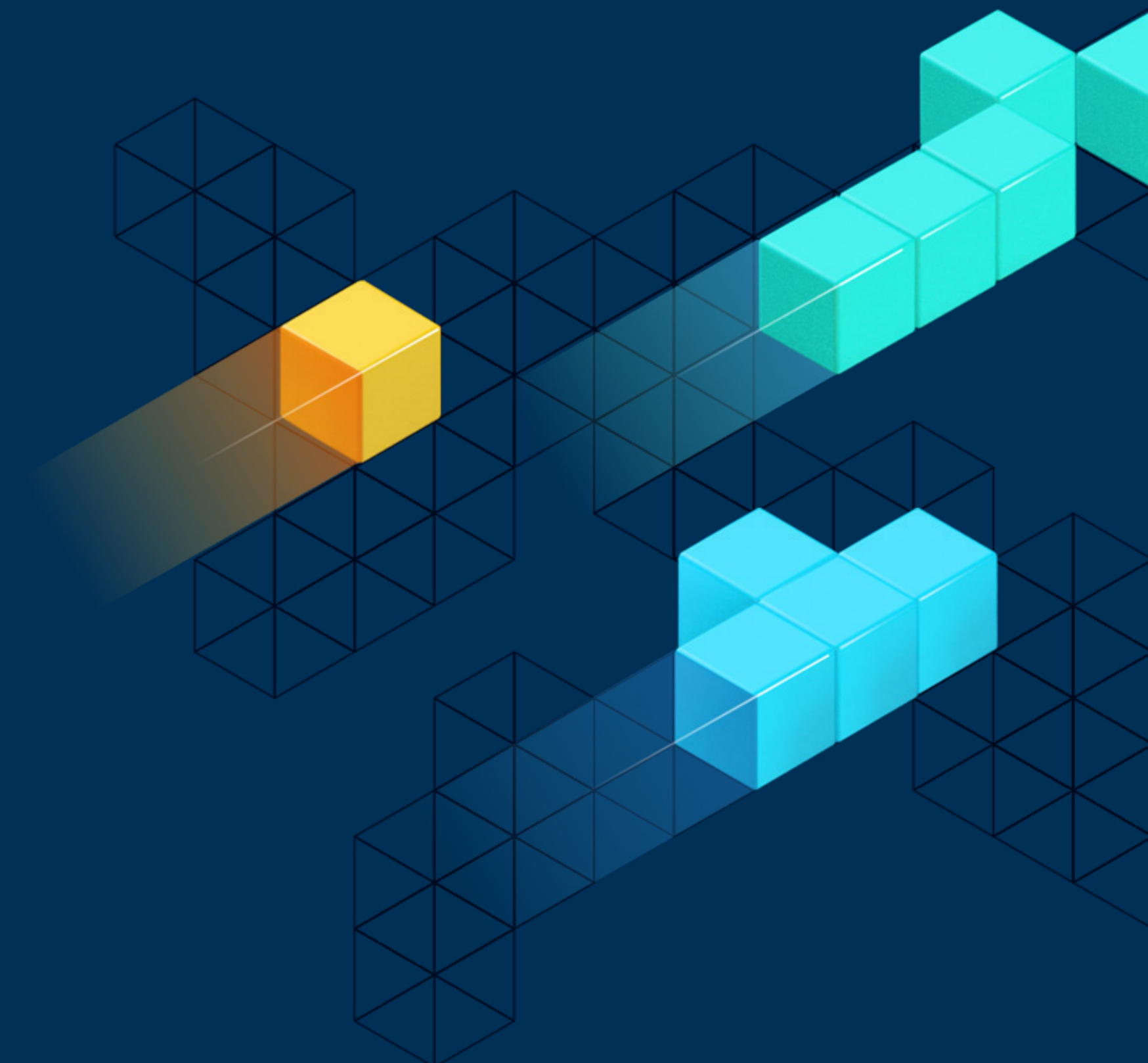




GUIDE DOCUMENTATION

# Users

Creating, editing and removing users



# Contents

**This guide explains how to set up new users for access to your accounts, plus how to edit their details, or remove them.**

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The Users screen, accessed via the side menu, shows a table of existing users with access to your accounts and their status. Users are managed from this screen. Only those with an Admin role or above can manage users.

The screenshot displays the 'Users' management interface for 'Busy Business Limited'. The side menu on the left includes options for Accounts, Pending payments, Beneficiaries, Approvals, Reports, Users (highlighted with a red arrow), and Notifications. The main content area features a 'Create new user' button (with an arrow pointing to it and the text 'Opens a form to create a new user') and a table of existing users.

Name	Email	Role	User status
Lucy D'Zouza lucydouza	lucy.dzouza@busybusiness.com	Admin	ACTIVE
James Spinner jamesspinner	james.spinner@busybusiness.com	View	ACTIVE

Complete the details and select 'Create this user'

The screenshot shows a web form titled "Create a new user" with a "Cancel" button at the top left. The form contains the following fields:

- First name:** Dave
- Last name:** Smith
- Username:** davesmith
- Email address:** dave.smith@email.com
- Role:** Admin (with a dropdown arrow)

At the bottom of the form is a blue button labeled "Create this user".

Annotations with arrows point to specific parts of the form:


- An arrow points from the "Email address" field to a text box on the right: "A 'Welcome' email will be sent to the new user's email address with instructions on how to set themselves up in the Customer Portal".
- An arrow points from the "Role" dropdown to a list of roles: "Admin", "User", and "View". A text box below this list says: "Available roles, depending on how you are set up, will display in the role dropdown.".
- An arrow points from the "Create this user" button to the text: "Click to submit form".

The new user will appear in the table. New users will show a status of 'Created' until the user activates from their Welcome email, creates a password, and signs in.

The screenshot shows a user management interface with a green success message at the top: "USER CREATED". Below the message is a "Users" section with a "Create new user" button. A table lists three users: Lucy D'Zouza (Admin, ACTIVE), James Spinner (View, ACTIVE), and Dave Smith (Admin, CREATED). A blue arrow points from the "CREATED" status to the text "New user appears in table". Another blue arrow points from the "Users" header to the text "Selecting a user from the table opens their details for editing." A third blue arrow points from the success message to the text "Success message".

Name	Email	Role	User status
Lucy D'Zouza lucyzouza	lucy.dzouza@busybusiness.com	Admin	ACTIVE
James Spinner jamesspinner	james.spinner@busybusiness.com	View	ACTIVE
Dave Smith davesmith	james.spinner@busybusiness.com	Admin	CREATED

Close

 **Dave Smith**  
davesmith

First name

Last name

Username

Email address

Role

Status

Save changes

Remove this user

Username is not editable

Click to save changes

✔ CHANGES SAVED ✕


**Users** Delegate access Create new user

Name	Email	Role	User status
Lucy D'Zouza lucydouza	lucy.dzouza@busybusiness.com	Admin	ACTIVE
James Spinner jamesspinner	james.spinner@busybusiness.com	View	ACTIVE
Dave Smith davesmith	james.spinner@busybusiness.com	Admin	ACTIVE

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→ Success toast

Close

 **Dave Smith**  
davesmith

First name

Last name

Username

Email address

Role

Status

Are you sure you want to remove this user?

Remove this user

Select Remove this user to delete, confirm pop up asks if you're sure



✓ USER REMOVED✕

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

About Modulr

## Users Delegate access

[Create new user](#)

Name	Email	Role	User status
Lucy D'Zouza lucydouza	lucy.dzouza@busybusiness.com	Admin	ACTIVE
James Spinner jamesspinner	james.spinner@busybusiness.com	View	ACTIVE

Success message

The removed user will no longer be able to sign in to the Customer Portal.

The role that you assign to a user determines what permissions they have in the Customer Portal. Only Admin users can create and manage other users, and they can only create users of the same role or lower than themselves. The roles that appear in the New User form will depend on how you are set up. This table shows a summary of the basic roles available.

Role	Description
<b>Admin</b>	Can create other users and have access to all features in the portal except making approvals
<b>Admin + Approver</b>	Can create other users, have access to all features in the portal and also approve payments and beneficiaries
<b>User</b>	Can create payments etc but some actions restricted such as creating users and making approvals
<b>User + Approver</b>	Same as a User, but can also make approvals
<b>View</b>	Can only view information in the portal, eg they can't create payments or beneficiaries etc
<b>View + Approver</b>	Same as a View user, but can make approvals



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