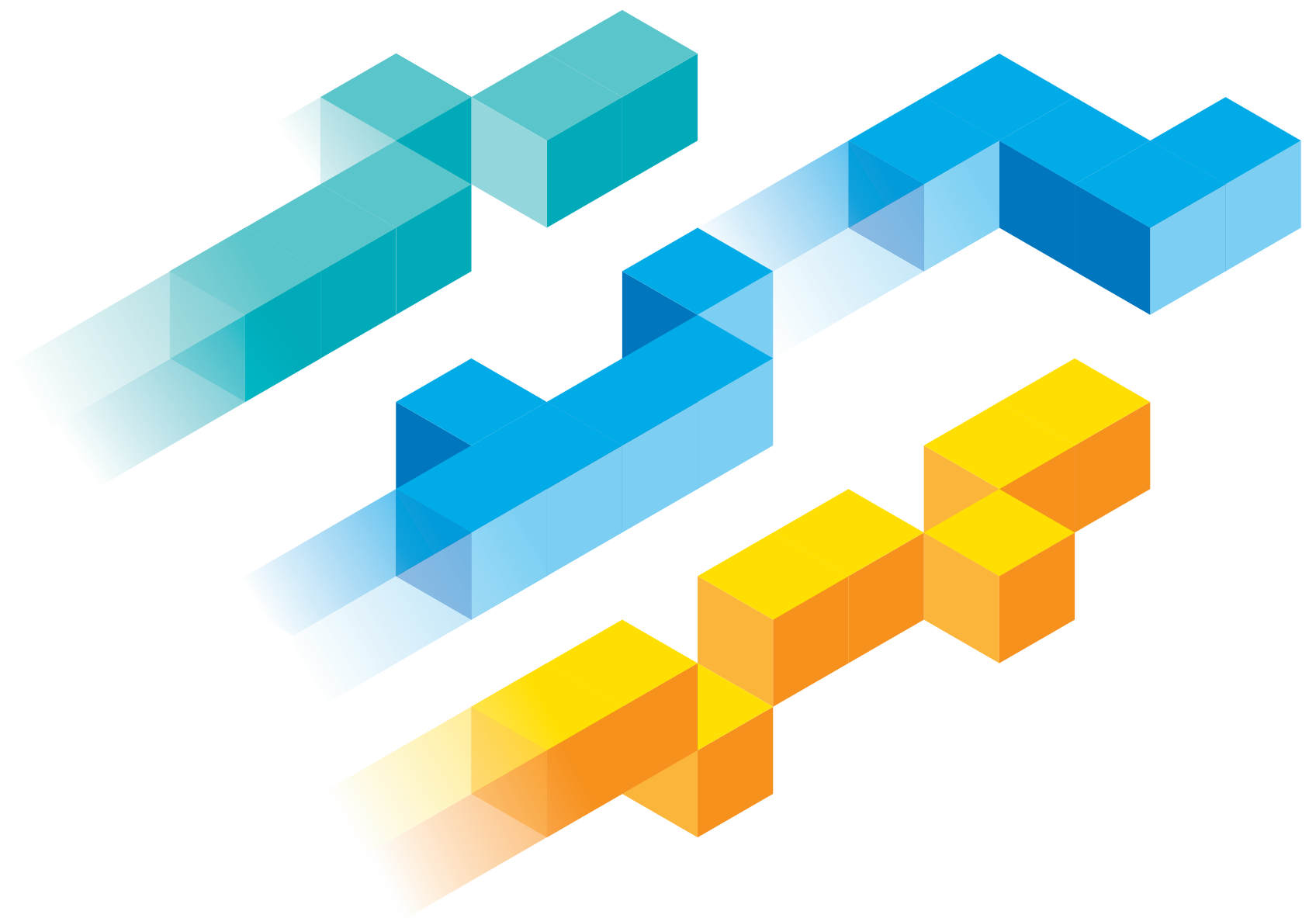


## PLATFORM FEATURES

# Access groups

Creating, editing and managing groups to determine particular users' access to particular accounts and beneficiaries.





## Introduction

Access groups allow a Customer to ensure certain users only have access to certain accounts and beneficiaries.

*Admin* and *Admin+Approver* users can create groups to define other users' access to accounts and beneficiaries. Any user in a group will only have access to items in that group.

Users have to be in the same group as the accounts and beneficiaries they need access to. They **can** be in more than one group.

Users not in any group have access to **everything** the customer has.

## Role permissions

Users have access to the items in a group they're in under the same permissions as their role allows.

## An example

Customer A has 2 accounts and 5 users.

The customer has created 2 Access Groups: "Payroll" and "Supplier".

Users 1 and 2 operate the payroll for the business, so they are in the "Payroll" group.

This group only has the payroll account (Acc 1) and associated beneficiaries in it.

Users 3 and 4 operate the Supplier payments, so they are only in the "Supplier" group.

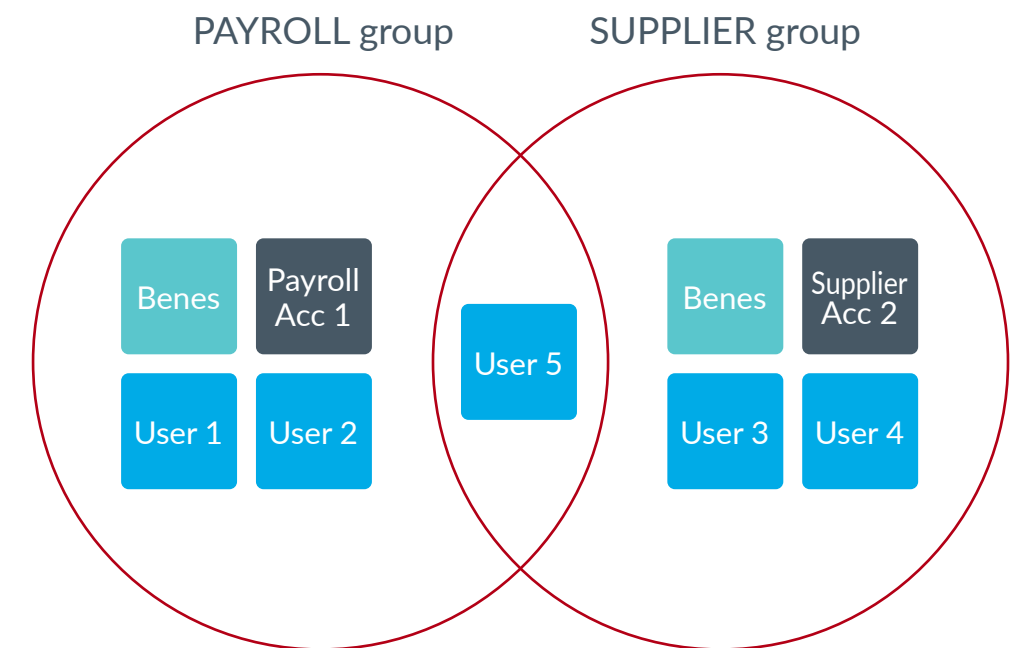
This group only has the supplier account (Acc 2) and associated beneficiaries in it.

User 5 works on payroll **and** supplier tasks, so is in both groups, and therefore has access to both the payroll and supplier accounts and the associated beneficiaries in both groups.

When user 1 goes to make a payroll payment, they'll:

- Only be able to view the payroll account
- Only be able to select sending accounts that are in the payroll group
- Only be able to select beneficiaries that are in the payroll group


When they view **payments** or **approvals** in the customer portal, they'll only see payments on **accounts** that are in their group.



By default, the Access Groups feature will be switched off\*

Customers will see the below screen if they navigate to Users > Access groups. If they feel the feature will be of benefit, they can call Customer Support and arrange for an introduction session and to turn the feature on.

\* Sage Customers who had a custom user set up when they were migrated to Salary & Supplier Payments will have Access Groups ON, and the configuration matching their original set up.



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### Access groups

Access groups allow you to organise users' access for individual Accounts and Beneficiaries, so not every user has access to everything.

If you think your setup would benefit from this feature, get in touch and we'll talk through the options.


 [support@modulrfinance.com](mailto:support@modulrfinance.com)

 030 3313 0060

Contact Customer Support to learn about the feature and to get it activated

Customers that have the feature switched on but have not yet created any Access Groups will see this screen when they navigate to Users > Access Groups.

If there are no Access Groups created, all users have access to everything under their customer (within their role permissions).



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Access groups


Currently, all users have access to all accounts and beneficiaries.

1




Create a new Access Group and give it a descriptive name

2



Add accounts, beneficiaries and users to the new Access Group

3



Users only see the accounts and beneficiaries in a group they're in

Users not in any group have access to everything.

Access groups allow you to organise users' access for individual Accounts and Beneficiaries, so not every user has access to everything.


Create groups to define users' access the way you want it, then add accounts, beneficiaries and users to the group. All users in a group will have access to everything in that group.

Create a new access group

Customers who have the feature turned on can create their first group here

Once the user creates their first Access Group, this information will no longer display, but is accessible from the 'i' icon next to the Access Groups tab (displays if an access group is created).

Selecting ‘Create a new access group’ on the main screen will provide a form to complete to create the group.



Create a new access group

Access group name

Enter a name for this access group50


Create

Cancel

Access Group  
can be given a  
custom name

Newly created , or access groups that are already set up are viewed in Users > Access Groups.

Only users with role *admin* or *admin+approver* can view and manage Access Groups  
(same as the permissions to view and manage users)



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Access groups ⓘ

Create a new access group

| Group name     | Accounts | Beneficiaries | Users |  |
|----------------|----------|---------------|-------|--|
| Access group 1 | 6        | 12            | 7     |  |
| Access group 2 | 0        | 0             | 0     |  |
| Access group 3 | 0        | 0             | 1     |  |

Access Groups are listed here, showing a total of how many of each item is in the group.

The name displayed is the name given at creation

Selecting the group in the main list screen opens a view of that specific group and it's contents

Split into three tabs –Accounts, Beneficiaries and Users (below shows the Accounts in this access group)

Users in a group only have access to the accounts and beneficiaries in that group

Close

Manage access group

ACCESS GROUP 1

Edit name

Add account to access group

Accounts

Beneficiaries

Users

| Account ID | Account            | Alias          | Identifier          |                       |
|------------|--------------------|----------------|---------------------|-----------------------|
| A0200001   | System Systems Ltd | Main Account   | 00-00-00 / 12345678 | <input type="radio"/> |
| A0200002   | System Systems Ltd | Second Account | 00-00-00 / 87654321 | <input type="radio"/> |
| A6674771   | System Systems Ltd | Payroll        | 00-00-00 / 12348765 | <input type="radio"/> |

Edit the name of the Access Group here (works the same way as editing an account's name in the main account view)

Select to add another account to this group

Select to remove this specific account from this group

# Add an account to an Access Group

Selecting ‘Add account to access group’ on the Group contents screen opens a dialog to add an account to the group

Can add 1 account or all

If many accounts are required to be added, but not all, select all, then remove specific ones from the group contents screen.

Close

Manage access group

ACCESS GROUP 1

Edit name

Add account to access group

Accounts

Beneficiaries

| Account ID | Account            |
|------------|--------------------|
| A0200001   | System Systems Ltd |
| A0200002   | System Systems Ltd |
| A6674771   | System Systems Ltd |

Add account to access group

Adding to group:

Access group 1

Select account

Start typing alias or account number

Select all

If you need to add many, select all, ‘Add to group’, then remove the ones you don’t want in the group from the main screen.

Add to group

Cancel

Displays the group the user is adding the account to

Type-ahead field makes finding the right account easy – just start typing the name



View the beneficiaries that are in a group, and manage adding and removing

Close

Manage access group

ACCESS GROUP 1

Edit name

Add beneficiary to access group

Accounts

Beneficiaries

Users

| Name            | Identifier          | Reference message |                       |
|-----------------|---------------------|-------------------|-----------------------|
| Capital Systems | 00-00-00 / 12345678 | IntPayment        | <input type="radio"/> |
| System Reports  | 00-00-00 / 12345678 | IntPayment        | <input type="radio"/> |
| Nandos          | 00-00-00 / 12345678 | IntPayment        | <input type="radio"/> |

Select to add another beneficiary to this group

Select to remove this specific beneficiary from this group

Selecting ‘Add beneficiary to access group’ on the Group contents screen opens a dialog to add a beneficiary to the group.

Can add 1 beneficiary or all

If many beneficiaries are required to be added, but not all, select all, then remove specific ones from the group contents screen.

Close

Manage access group

ACCESS GROUP 1

Edit name

Accounts

Beneficiaries

| Name            | Identifier        |
|-----------------|-------------------|
| Capital Systems | 00-00-00 / 123456 |
| System Reports  | 00-00-00 / 123456 |
| Nandos          | 00-00-00 / 123456 |

Add beneficiary to access group

Add beneficiary to access group

Adding to group:

Access group 1

Select beneficiary

Start typing name, sort code or account number

Select all

If you need to add many, select all, ‘Add to group’, then remove the ones you don’t want in the group from the main screen.

Add to group

Cancel

Displays the group the user is adding the beneficiary to

Type-ahead field makes finding the right beneficiary easy – just start typing the name

View the users that are in a group, and manage adding and removing

Close

Manage access group

ACCESS GROUP 1

Edit name

Add user to access group

Accounts

Beneficiaries

Users

| Name                       | Email                   | Role      | <input type="radio"/> |
|----------------------------|-------------------------|-----------|-----------------------|
| Lucy D'Zouza<br>lucydouza  | lucy.douza@systems.com  | View only | <input type="radio"/> |
| John System<br>johnsystem1 | john.system@systems.com | View only | <input type="radio"/> |
| Dave System<br>johnsystem1 | dave.system@systems.com | User      | <input type="radio"/> |

A note on Admin users and access groups

Admin users (if Access Groups is turned on for the customer) have permissions to manage (create, edit, delete) Access Groups. Therefore, admin users can't be in any user defined group, otherwise, they would only have access to managing that particular group, and wouldn't be able to see/manage other groups.

Select to add another user to this group

Select to remove this specific user from this group

Selecting 'Add user to access group' on the Group contents screen opens a dialog to add a user to the group.

Close

Manage access group

ACCESS GROUP 1

Edit name

Add user to access group

Accounts

Beneficiaries

| Name                       | Email             |
|----------------------------|-------------------|
| Lucy D'Zouza<br>lucydouza  | lucy.douza@syste  |
| John System<br>johnsystem1 | john.system@syste |
| Dave System<br>johnsystem1 | dave.system@syste |

Add user to access group

Adding to group:

Access group 1

Select user

Select user

Add to group

Cancel

Alison Merry

Brian Jones

Dave System

John System

Lucy D'Zouza

Admins can't be in a group

Displays the group the user is adding the user to

Dropdown list of available users

Users can only be added one at a time.

Any admins displayed in the users dropdown list will not be selectable

Admins can't be in any user defined group

# Remove an item from a Group – eg a Beneficiary

Users can select the item to be removed from the group via the checkbox on the right, then select Remove in the action bar below.

The process is the same to remove other accounts or users from the group (on their respective tab)

Select Beneficiaries tab to view the beneficiaries in this group

Close

Manage access group

ACCESS GROUP 1

Edit name

Add beneficiary to access group

Accounts

Beneficiaries

Users

| Name            | Identifier          | Reference message | <input type="checkbox"/>            |
|-----------------|---------------------|-------------------|-------------------------------------|
| Capital Systems | 00-00-00 / 12345678 | IntPayment        | <input checked="" type="checkbox"/> |
| System Reports  | 00-00-00 / 12345678 | IntPayment        | <input type="checkbox"/>            |
| Nandos          | 00-00-00 / 12345678 | IntPayment        | <input type="checkbox"/>            |

Remove from this access group

Selected 1

Select the item to be removed

Select to remove the item(s) from the group

## Remove an item (eg: beneficiary) from a Group – Confirmation dialog

When removing an item from a group, users are reminded that this doesn't **delete** the item, just removes it from the group

The screenshot displays the 'Manage access group' interface. At the top, there is a 'Close' button and the title 'Manage access group'. Below this, the 'ACCESS GROUP 1' is shown with an 'Edit name' button. A blue button 'Add beneficiary to access group' is on the right. The main content area has three tabs: 'Accounts', 'Beneficiaries' (which is active), and 'Users'. Under the 'Beneficiaries' tab, a table lists beneficiaries:

| Name            | Identifier        |
|-----------------|-------------------|
| Capital Systems | 00-00-00 / 123456 |
| System Reports  | 00-00-00 / 123456 |
| Nandos          | 00-00-00 / 123456 |

Each row has a radio button to its right. The second row, 'System Reports', has its radio button selected (indicated by a blue checkmark). A confirmation dialog is overlaid in the center with the title 'Remove beneficiary from access group?'. The dialog text states: 'This will remove this beneficiary from the group, it won't delete the beneficiary. Users in this group will no longer have access to this beneficiary.' There are two buttons in the dialog: 'Yes, remove beneficiary from access group' (highlighted in blue) and 'No, go back'. Arrows point from these buttons to explanatory text on the right. At the bottom of the interface, there is a red button 'Remove from this access group' and a status indicator 'Selected 1'.

**Remove beneficiary from access group?**

This will remove this beneficiary from the group, it won't delete the beneficiary. Users in this group will no longer have access to this beneficiary.

**Yes, remove beneficiary from access group**

No, go back

Removes the Beneficiary from the group and returns to the beneficiaries tab on the management screen

Does nothing, returns to the beneficiaries tab on the management screen

Remove from this access group

Selected 1

Users can still view the information about Access Groups when they've already created groups by selecting the 'i' icon on the Main list screen

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Create a new access group

| Group name     | Accounts | Beneficiaries | Users |
|----------------|----------|---------------|-------|
| Access group 1 | 6        | 12            | 7     |
| Access group 2 | 0        | 0             |       |
| Access group 3 | 0        | 0             |       |

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Create a new access group

Close

Access groups

1

Create a new Access Group and give it a descriptive name

2

Add accounts, beneficiaries and users to the new Access Group

3

Users only see the accounts and beneficiaries in a group they're in

Users not in any group have access to everything.

Access groups allow you to organise users' access for individual Accounts and Beneficiaries, so not every user has access to everything.


Create groups to define users' access the way you want it, then add accounts, beneficiaries and users to the group. All users in a group will have access to everything in that group.

# Delete an Access Group

Select the checkbox on the right to delete an Access group (only one can be deleted at a time)

This only deletes the group, not the individual items in the group

If, after deleting the group, a user is not in any group, they go back to being able to see everything



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Access groups ⓘ

Create a new access group

| Group name     | Accounts | Beneficiaries | Users |                                     |
|----------------|----------|---------------|-------|-------------------------------------|
| Access group 1 | 6        | 12            | 7     | <input type="checkbox"/>            |
| Access group 2 | 0        | 0             | 0     | <input checked="" type="checkbox"/> |
| Access group 3 | 0        | 0             | 1     | <input type="checkbox"/>            |

Delete access group

Selected 1

Select to initiate the action bar below


Select to delete the group



# Delete an Access Group – if it contains users

It’s not possible to delete an access group if it contains users. Selecting a checkbox of a group that has users in it will show a popover with this info.

Users need to remove the users from the group first, then the delete checkbox will be active.



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Access groups ⓘ

Create a new access group

| Group name     | Accounts | Beneficiaries | Users |                          |
|----------------|----------|---------------|-------|--------------------------|
| Access group 1 | 6        | 12            | 7     | <input type="checkbox"/> |
| Access group 2 | 0        | 0             | 0     | <input type="checkbox"/> |
| Access group 3 | 0        | 0             | 1     | <input type="checkbox"/> |

You can't delete a group containing users. Remove the users first then delete the group

Inactive checkbox if users are in the group. Hover shows a popover with explanatory message

Accounts can also be assigned to Access Groups at the point of their **creation**.

The target Access Group needs to be created first, then when the new Account is created, a new field in the 'Create' form allows the user to select an access group to add the account to when it's created.

Not a mandatory field – if no group is selected, the new account will be added to the master group as usual, but not to any user-defined group

1 or more access groups can be selected to add the new item to at the point of creation

No group

☐

Select all

☒

Access group 1

☐

Access group 2


☐

Access group 3

☐

Access group 4

Cancel



Add a new account

You're adding a new account to  
<customerName>

Currency

GBP British Pound

Account alias

Set account alias (optional)

Access group(s) (optional)

No group

Add new account

Field to select the access group(s) to assign the new item to

Beneficiaries can also be assigned to Access Groups at the point of their **creation**.

The target Access Group needs to be created first, then when the new Beneficiary is created, a new field in the ‘Create’ form allows the user to select an access group to add the beneficiary to when it’s created.

Not a mandatory field – if no group is selected, the new account will be added to the master group as usual, but not to any user-defined group

1 or more access groups can be selected to add the new item to at the point of creation

No group

☐

Select all

☒

Access group 1

☐

Access group 2

☐

Access group 3

☐

Access group 4

Cancel

Create a new beneficiary

Beneficiary name

Enter name (max 18 characters)

18

Beneficiary currency

GBP

British Pound

Sort code

00-00-00

Account number

Enter account number eg: 09876543

Reference message

Enter message (max 18 characters)

18

This will appear on the beneficiary's statement

Access group(s) (optional)

No group

Create

Field to select the access group(s) to assign the new item to

Users can also be assigned to an Access Group at the point of their **creation**.

The target Access Group needs to be created first, then when the new User is created, a new field in the 'Create' form allows the user to select an access group to add the new user.

Not a mandatory field – if no group is selected, the new account will be added to the master group as usual, but not to any user-defined group

1 or more access groups can be selected to add the new item to at the point of creation

No group

☐

Select all

☒

Access group 1

☐

Access group 2

☐

Access group 3

☐

Access group 4

Cancel

Create a new user

First name

Enter first name

Last name

Enter last name

Username

Enter username

Email address

Enter email address

Role

Select role

Access group(s) (optional)

No group

Create this user

Field to select the access group(s) to assign the new item to

From the account options menu on the account view, users can edit the group an account is in.

Select or de-select the groups to edit which groups this item is in.

No group

☐

Select all

☒

Access group 1

☐

Access group 2

☐

Access group 3

☐

Access group 4

Manage this account's access group(s)

You're managing the access group(s) of account:  
<accountAlias>  
<sortCode> / <accountNumber>

This account is visible to users in this / these access group(s)

Access group(s) (optional)

Assigned to 2 groups

Save

Edit which access group this account is in here.

Beneficiaries can't be edited in the portal, but the group they're in can be edited from the beneficiaries screen by selecting the beneficiary's row in the list.

Select or de-select the groups to edit which groups this item is in.

No group

☐

Select all

☒

Access group 1

☐

Access group 2

☐

Access group 3

☐

Access group 4

Manage beneficiary access group(s)

You're managing the access group(s) of beneficiary:  
<beneficiaryName>  
<sortCode> / <accountNumber>

This beneficiary is visible to users in this / these access group(s)

Access group(s) (optional)

Assigned to 2 groups

Save

Edit which access group this beneficiary is in here.

When editing a user, the group(s) the user is in can be changed.

A note on Admin users and access groups

Admin users (if Access Groups is turned on for the customer) have permissions to manage (create, edit, delete) Access Groups. Therefore, admin users can't be in any user defined group, otherwise, they would only have access to managing that particular group, and wouldn't be able to see/ manage other groups.

Select or de-select the groups to edit which groups this item is in.

No group

☐ Select all


☒ Access group 1

☐ Access group 2

☐ Access group 3

☐ Access group 4

Close

 Steve Burnham

steve.burnham

First name

Steve

Last name

Burnham

Username

steve.burnham

Email address

steve.burnham@gmail.com

Role

Admin

Status

Active

Access group(s) (optional)

Access group 2

Save changes

Remove this user

Edit which access group this user is in here.

This field doesn't display if the user being edited is any Admin user.



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