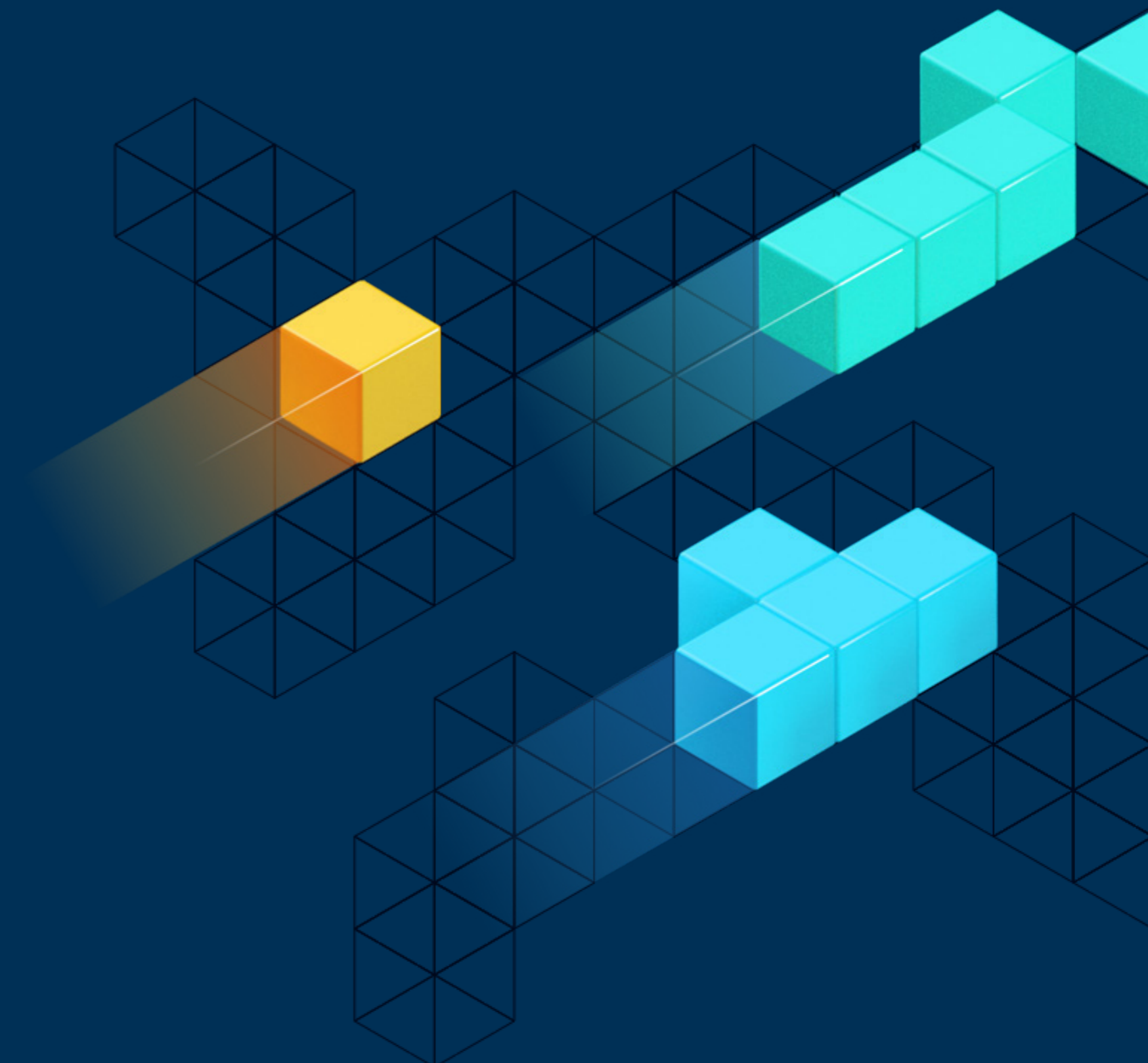




GUIDE DOCUMENTATION

Delegate linking

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



Granting access to a Delegate

The screenshot shows the Modlr interface for 'Busy Business Limited'. The left sidebar contains navigation items: Accounts, Move money, Pending payments, Beneficiaries, Approvals, Reports, Users (highlighted), and Notifications. At the bottom of the sidebar are 'Get help' and 'About Modlr'. The main content area is titled 'Delegates' and includes a sub-header 'Users Delegates'. Below this is a descriptive paragraph: 'You can give Delegate access to a service provider to manage your accounts on your behalf.' A section titled 'Delegate's reference number' contains a text input field with the placeholder 'Enter Delegate's reference number'. Below the input field is a paragraph: '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.' A blue 'Find' button is positioned below the text. Annotations include a blue arrow pointing from the text 'View "Delegate access"' to the 'Delegates' link, and another blue arrow pointing from the text 'Form for linking a Delegate' to the 'Find' button.

View "Delegate access"

Busy Business Limited ⓘ

Lucy D'Zouza ⓘ

Accounts

Move money

Pending payments

Beneficiaries

Approvals

Reports

Users

Notifications

Get help ↗

About Modlr

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.

Find

Form for linking a Delegate

Modlr Busy Business Limited Lucy D'Zouza

Users Delegates

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

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.

Find

User enters their Delegate's Reference Number

Find button looks up ID for match

Modulr Busy Business Limited ⓘ Lucy D'Zouza 👤

Users Delegates

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

Delegate's reference number

D3245535

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 address

James & Son accountants
12 Locklear Way
Biggleswade
BG12 8UH

[Change](#)

Role

Select role for this Delegate ▼

I confirm I'm authorising this Delegate to access and manage accounts on the business's behalf.

[Grant access](#)

Name and address details of delegate that matches the entered details
Goes back to default form

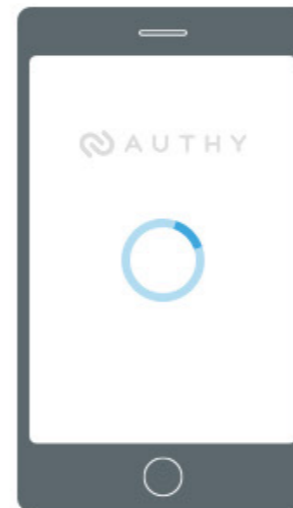
Select role to give Delegate

Agree to authorisation

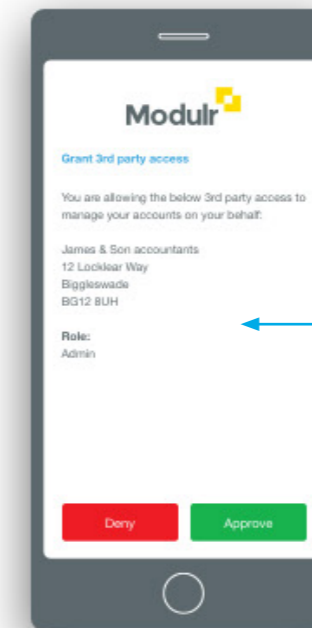
User checks details and clicks Grant Access button

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

Success message

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

The Delegate's view

Modlr

XYZ Accounting • Lucy D'Zouza

Dashboard

Customers

Users

Customers

Search

Search for customer name or ID

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

Get help

About Modlr

When Delegate signs in, they will 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).

Revoking a Delegate's access

Modur Busy Business Limited Lucy D'Zouza

Users Delegates

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

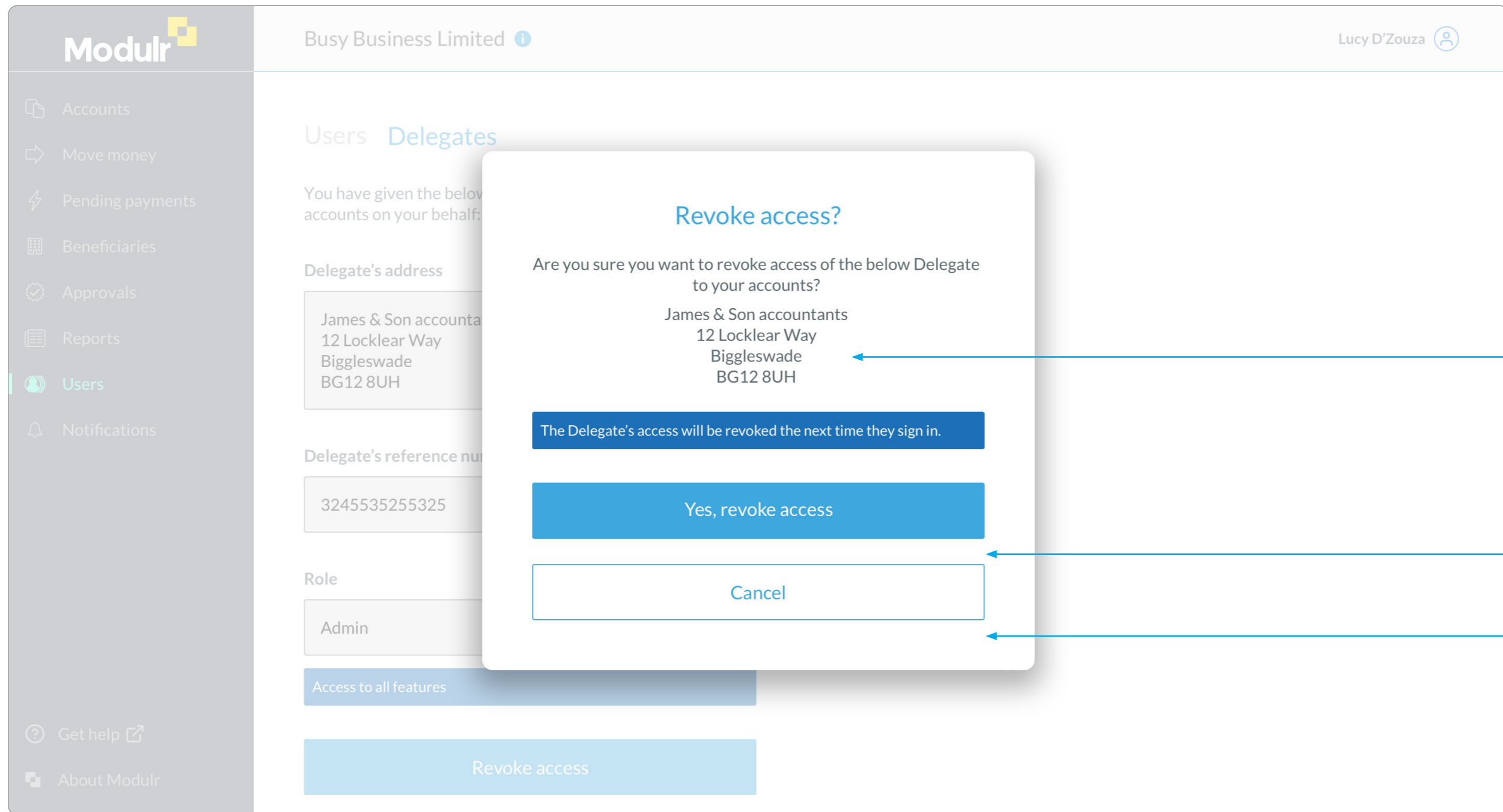
Delegate's address
James & Son accountants
12 Locklear Way
Biggleswade
BG12 8UH

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



Displays name and address of Delegate user is revoking

Revoke removes Delegate access to the customer's accounts

Cancel dismisses confirm box, returns to previous screen

✓ ACCESS REVOKED

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

Get help

About Modulr

Show success message

Page returns to it's original view

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



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