Permissions Reference

The FintEdge provides several high-level permissions (Special) that grant extended or full access beyond standard role-based permissions.

Permission	Function
ALL FUNCTIONS	Grants full access to all system functionalities. Includes all available actions (create, read, update, delete, approve) across all modules.
ALL FUNCTIONS READ	Provides read-only access to all system data
BYPASS TWOFACTOR	Allows users to access the system without two-factor authentication. Should be assigned only in exceptional cases due to security implications.
CHECKER SUPER USER	Grants full approval (checker) rights across the system, Allows the user to approve or reject any operation that requires authorization.
REPORTING SUREP USER	Provides full access to all reporting capabilities: Allows viewing, generating, and exporting all available reports in the system.

> **Note**: High-level (Special) permissions override all assigned granular (low-level) permissions within the Fintedge. These permissions should be assigned only in exceptional cases and with proper control.

Back Office

Permission	Function
Account_transfer	APPROVE ACCOUNTTRANSFER DECLINE ACCOUNTTRANSFER DECLINEAML ACCOUNTTRANSFER DECLINEAMLFINAL ACCOUNTTRANSFER EXECUTE ACCOUNTTRANSFER LEDGERTOSUBLEDGER ACCOUNTTRANSFER SETSENT ACCOUNTTRANSFER SUBLEDGERTOLEDGER ACCOUNTTRANSFER READ STANDINGINSTRUCTION

Permission	Function
Accounting	READ GLACCOUNT CREATE JOURNALENTRY CREATE JOURNALENTRY CHECKER READ JOURNALENTRY RESVERSE JOURNALENTRY
Configuration	READ ACCOUNTING
Organisation	READ OFFICE

Permission	Function
Portfolio	CREATE ADDRESS CREATE ADDRESS CHECKER DELETE ADDRESS DELETE ADDRESS CHECKER READ ADDRESS UPDATE ADDRESS UPDATE ADDRESS CHECKER ACCEPTTRANSFER CLIENT ACCEPTTRANSFER CLIENT CHECKER ACTIVATE CLIENT ACTIVATE CLIENT CHECKER ASSIGNSTAFF CLIENT BLOCK CLIENT CLOSE CLIENT CREATE CLIENT CREATE CLIENT CHECKER DELETE CLIENT DELETE CLIENT CHECKER REACTIVATE CLIENT REACTIVATE CLIENT CHECKER READ CLIENT REJECT CLIENT REJECT CLIENT CHECKER REJECTTRANSFER CLIENT REJECTTRANSFER CLIENT CHECKER UNBLOCK CLIENT UPDATE CLIENT UPDATE CLIENT CHECKER UPDATESAVINGSACCOUNT CLIENT CREATE CLIENTCHARGE CREATE CLIENTCHARGE CHECKER DELETE CLIENTCHARGE DELETE CLIENTCHARGE CHECKER INACTIVATE CLIENTCHARGE INACTIVATE CLIENTCHARGE CHECKER PAY CLIENTCHARGE PAY CLIENTCHARGE CHECKER READ CLIENTCHARGE UPDATE CLIENTCHARGE UPDATE CLIENTCHARGE CHECKER CREATE CLIENTNOTE CREATE CLIENTNOTE CHECKER DELETE CLIENTNOTE DELETE CLIENTNOTE CHECKER READ CLIENTNOTE UPDATE CLIENTNOTE UPDATE CLIENTNOTE CHECKER CREATE DOCUMENT CREATE DOCUMENT CHECKER DELETE DOCUMENT DELETE DOCUMENT CHECKER READ DOCUMENT UPDATE DOCUMENT UPDATE DOCUMENT CHECKER CREATE FAMILYMEMBERS DELETE FAMILYMEMBERS READ FAMILYMEMBERS UPDATE FAMILYMEMBERS CREATE SAVINGSACCOUNT CREATE SAVINGSACCOUNT CHECKER DELETE SAVINGSACCOUNT DELETE SAVINGSACCOUNT CHECKER READ SAVINGSACCOUNT

Permission	Function
Report	VIEW CLIENT SUMMARY
Savings Transactions	CREATE ACCOUNTTRANSFER CREATE ACCOUNTTRANSFER CHECKER EXECUTECRYPTO ACCOUNTTRANSFER READ ACCOUNTTRANSFER ACTIVATE SAVINGSACCOUNT ACTIVATE SAVINGSACCOUNT CHECKER APPROVE SAVINGSACCOUNT APPROVE SAVINGSACCOUNT CHECKER BLOCK SAVINGSACCOUNT BLOCK SAVINGSACCOUNT CHECKER BLOCKCREDIT SAVINGSACCOUNT BLOCKCREDIT SAVINGSACCOUNT CHECKER BLOCKDEBIT SAVINGSACCOUNT BLOCKDEBIT SAVINGSACCOUNT CHECKER CLOSE SAVINGSACCOUNT CLOSE SAVINGSACCOUNT CHECKER HOLD SAVINGSACCOUNT REJECT SAVINGSACCOUNT REJECT SAVINGSACCOUNT CHECKER REVERSETRANSFER SAVINGSACCOUNT UNBLOCK SAVINGSACCOUNT UNBLOCK SAVINGSACCOUNT CHECKER UNBLOCKCREDIT SAVINGSACCOUNT UNBLOCKCREDIT SAVINGSACCOUNT CHECKER UNBLOCKDEBIT SAVINGSACCOUNT UNBLOCKDEBIT SAVINGSACCOUNT CHECKER UNHOLD SAVINGSACCOUNT UPDATESAVINGSOFFICER SAVINGSACCOUNT UNDOTRANSACTION SAVINGSACCOUNT UNDOTRANSACTION SAVINGSACCOUNT CHECKER

Front Office

Permission	Function
Account_transfer	READ STANDINGINSTRUCTION

Permission	Function
Portfolio	CREATE ADDRESS CREATE ADDRESS CHECKER DELETE ADDRESS DELETE ADDRESS CHECKER READ ADDRESS UPDATE ADDRESS UPDATE ADDRESS CHECKER ACTIVATE CLIENT ACTIVATE CLIENT CHECKER CREATE CLIENT CREATE CLIENT CHECKER READ CLIENT UPDATE CLIENT UPDATE CLIENT CHECKER UPDATESAVINGSACCOUNT CLIENT CREATE CLIENTCHARGE CREATE CLIENTCHARGE CHECKER DELETE CLIENTCHARGE DELETE CLIENTCHARGE CHECKER INACTIVATE CLIENTCHARGE INACTIVATE CLIENTCHARGE CHECKER PAY CLIENTCHARGE PAY CLIENTCHARGE CHECKER READ CLIENTCHARGE UPDATE CLIENTCHARGE UPDATE CLIENTCHARGE CHECKER CREATE CLIENTNOTE CREATE CLIENTNOTE CHECKER DELETE CLIENTNOTE DELETE CLIENTNOTE CHECKER READ CLIENTNOTE UPDATE CLIENTNOTE UPDATE CLIENTNOTE CHECKER CREATE DOCUMENT CREATE DOCUMENT CHECKER DELETE DOCUMENT DELETE DOCUMENT CHECKER READ DOCUMENT UPDATE DOCUMENT UPDATE DOCUMENT CHECKER CREATE FAMILYMEMBERS DELETE FAMILYMEMBERS READ FAMILYMEMBERS UPDATE FAMILYMEMBERS CREATE SAVINGSACCOUNT CREATE SAVINGSACCOUNT CHECKER DELETE SAVINGSACCOUNT DELETE SAVINGSACCOUNT CHECKER READ SAVINGSACCOUNT UPDATE SAVINGSACCOUNT UPDATE SAVINGSACCOUNT CHECKER CREATE SAVINGSACCOUNTCHARGE CREATE SAVINGSACCOUNTCHARGE CHECKER DELETE SAVINGSACCOUNTCHARGE DELETE SAVINGSACCOUNTCHARGE CHECKER INACTIVATE SAVINGSACCOUNTCHARGE INACTIVATE SAVINGSACCOUNTCHARGE CHECKER PAY SAVINGSACCOUNTCHARGE PAY SAVINGSACCOUNTCHARGE CHECKER READ SAVINGSACCOUNTCHARGE UPDATE SAVINGSACCOUNTCHARGE UPDATE SAVINGSACCOUNTCHARGE CHECKER

Permission	Function
Report	VIEW CLIENT SUMMARY
Client Transactions	READTRANSACTION CLIENT
Savings Transactions	READ ACCOUNTTRANSFER ACTIVATE SAVINGSACCOUNT ACTIVATE SAVINGSACCOUNT CHECKER

Reports

Permission	Function
Reports	Enables users to access the reporting section, choose relevant reports, review data, and download reports as needed. For example, View Active Clients - Email View Active Group Leaders - Email View Active Loan Clients - Email View Active Loan Summary per Branch View Active Loans - Details

Manage Users

Permission	Function
Authorisation	CREATE USER CREATE USER CHECKER DELETE USER DELETE USER CHECKER READ USER UPDATE USER UPDATE USER CHECKER
Configuration	READ ADMIN

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