Roles

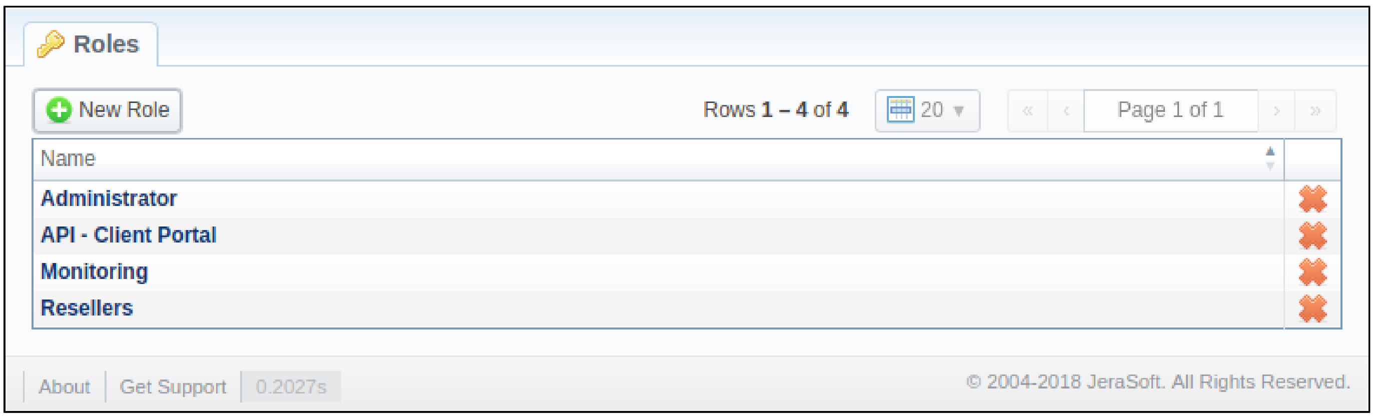
In this article

Roles List

This section allows to manage and specify access rights for all sections of the system. In the section, you can create new roles, as well as edit permissions of already existing ones. By default, there are 4 pre-installed roles:

- **Administrator** – this role has unlimited rights and access permissions in the system;
- **Monitoring** – this role has basic access permissions to work in the system that include viewing clients lists and summary reports, work with Factors Watcher, etc. However, the role doesn't stipulate for access to technical settings and some statistic info that is only available to Administrator;
- **Resellers** – this role has advanced access permissions for a complete work with the clients. User with this role also doesn't have access to technical settings and some statistic info that is only available to Administrator (use this role when adding Reseller or Agent user).
- **API - Client Portal** - this role has been created to simplify user's access to Client Portal and has next to none permissions for work inside JeraSoft Billing.

Screenshot: Roles section



Adding a New Role

To add a new role, click the **New Role** button on the toolbar. A pop-up window with role settings will appear, where you need to enter the name, choose the default module and select respective access rights in the **Entries** table. The ***Default Module*** field specifies a default section that will be displayed when you log in the system.

Note that a created user can **assign the role with respective permissions**. Therefore, if the user has access to create roles, he can assign the role with permission similar to his own or less.

Screenshot: Adding a new role window

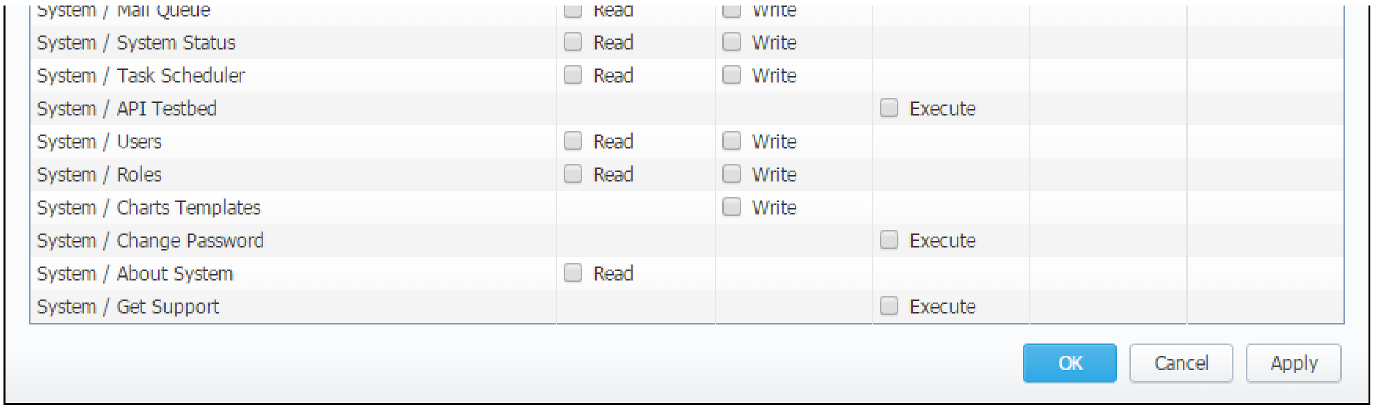
Roles

Name:

Default Module: Management / Clients

ENTRIES

Name	Access Permissions				
	☐	☐	☐	☐	☐
Management / Clients	☐ Read	☐ Write			☐ Full Delete
Management / Accounts	☐ Read	☐ Write			
Management / Rate Tables	☐ Read	☐ Write			
Management / Invoices	☐ Read	☐ Write			
Management / Transactions	☐ Read	☐ Write	☐ Execute		
Management / Balance Report	☐ Read		☐ Execute		
Management / Resellers	☐ Read	☐ Write			☐ Full Delete
Management / Client Packages	☐ Read	☐ Write			
Management / Presets	☐ Read	☐ Write			
Management / Traffic Processing	☐ Read	☐ Write			
Retail / Packages	☐ Read	☐ Write			
Retail / DID Management	☐ Read	☐ Write			
Retail / Calling Cards	☐ Read	☐ Write			
Retail / Top-up Cards	☐ Read	☐ Write			
Retail / Call Shops	☐ Read	☐ Write			
Statistics / Dashboard		☐ Write	☐ Execute		
Statistics / Summary Report	☐ Read		☐ Execute	☐ Billing data	
Statistics / Orig-Term Report	☐ Read		☐ Execute	☐ Billing data	
Statistics / Profit Report	☐ Read		☐ Execute		
Statistics / LCR Lists	☐ Read		☐ Execute		
Statistics / CDRs List	☐ Read	☐ Write	☐ Execute		
Statistics / Mismatches Report	☐ Read		☐ Execute		
Statistics / Calls Rerating			☐ Execute		
Statistics / Reports Templates	☐ Read	☐ Write			
Statistics / Archive Management	☐ Read	☐ Write			
Tools / Rates Analysis	☐ Read		☐ Execute		
Tools / Rates Generator			☐ Execute		
Tools / Active Calls			☐ Execute		
Tools / Factors Watcher	☐ Read	☐ Write			
Tools / CDR Disputes	☐ Read	☐ Write			
Routing / Routing Plans	☐ Read	☐ Write			
Routing / Routing Analysis	☐ Read		☐ Execute		
Routing / DR Policies	☐ Read	☐ Write			
Configuration / Code Decks	☐ Read	☐ Write			
Configuration / Currencies	☐ Read	☐ Write			
Configuration / Payment Accounts	☐ Read	☐ Write			
Configuration / Payment Terms	☐ Read	☐ Write			
Configuration / Payment Gateways	☐ Read	☐ Write			
Configuration / Time Profiles	☐ Read	☐ Write			
Configuration / Taxes Profiles	☐ Read	☐ Write			
Configuration / Groups	☐ Read	☐ Write			
Configuration / Invoices Templates	☐ Read	☐ Write			
Configuration / VoIP Gateways	☐ Read	☐ Write			
Configuration / Settings	☐ Read	☐ Write			
System / Events Log	☐ Read	☐ Write			
System / Audit Log	☐ Read				



Checkbox	Description
Read	Allows/forbids a user to view information presented in a section
Write	Allows/forbids a user to create, edit, and delete information presented in a section
Execute	Allows/forbids a user to execute system services in a section
Full Delete	Allows/forbids a user to perform full deletion of entities in a section
Billing Data	Allows/forbids a user to work billing data (rates, profit, taxes, etc.) in a section

Attention

- **Parent Reseller has access to all information of his *Sub-Resellers,*** and, therefore, can assign **any routing plan and rate table** to them
- A user with disabled ***Management/Clients*** module in the **Roles section** will not see the Clients List from the *Clients Panel.*

Knowledge Base Articles

Error rendering macro 'contentbylabel'

parameters should not be empty