Roles

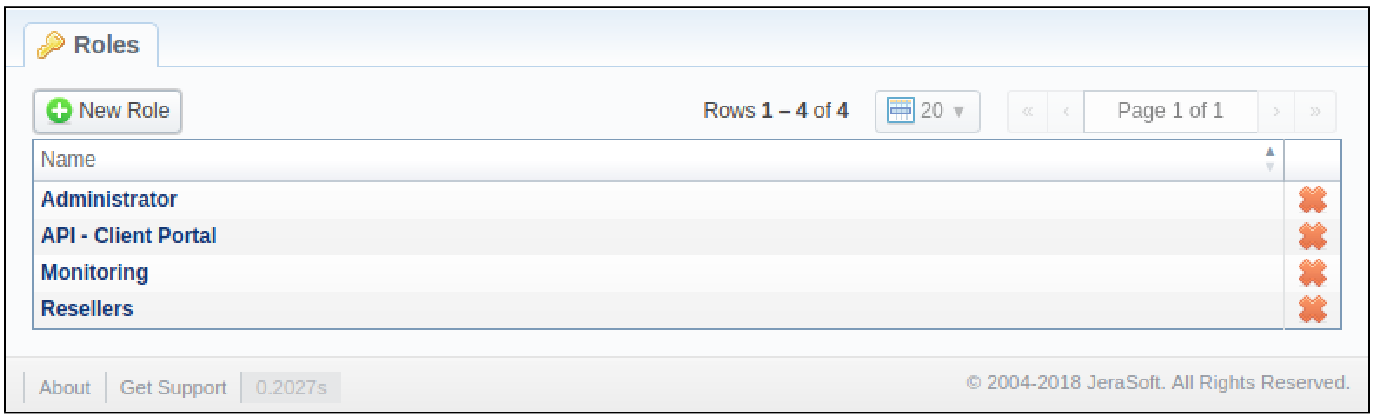
In this article

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, including viewing client lists and summary reports, etc. However, the role doesn't stipulate for access to technical settings and some statistical info that is only available to the Administrator;
- **Resellers** – this role has advanced access permissions for complete client management. User with this role also doesn't have access to technical settings and some statistical info that is only available to the Administrator (use this role when adding a Reseller or Agent user).
- **API - Client Portal** - this role has been created to simplify users' access to Client Portal and has next to no permissions for work inside JeraSoft Billing.

Screenshot: Roles section



Adding a New Role

Click the **New Role** button on the toolbar to add a new role. 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 to 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

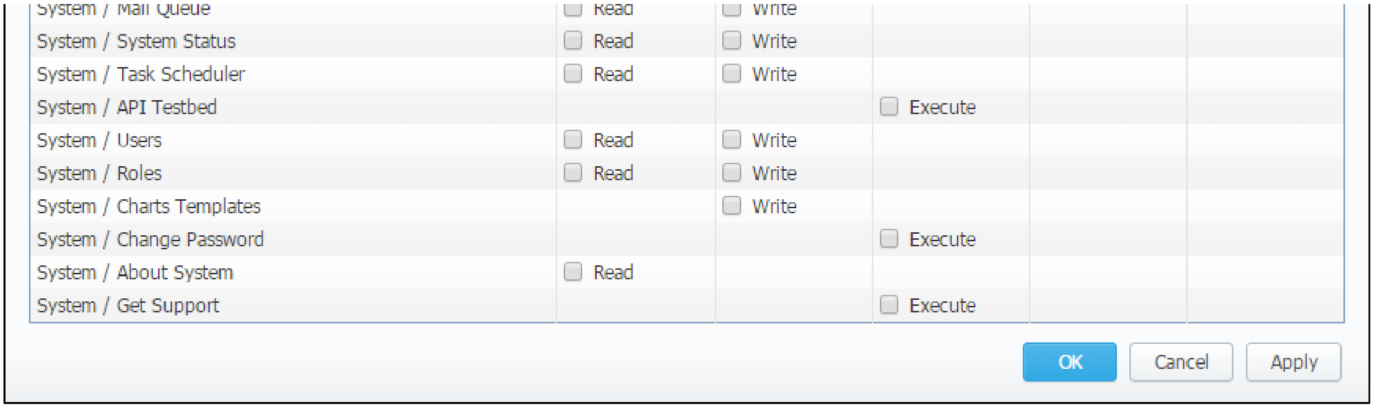
Roles

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 a 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