**Multi-User Permissions**

**Customer panel**

Multi-user roles & Permission, where a primary customer, referred to as the "Account Super Admin," has the ability to create and manage different user types. These roles have varying permissions based on their responsibilities. The roles include: Account Admin, Account Full User, Account Base User, Accounting Admin User, and Accounting Base User.

1. **Account Super Admin(Type= 2)**

**Description:** The main account holder (Customer) with full control and permissions. This account is created by Self sign-up or Admin create. Type of this user is 2.

**Permission:** Full access to all account feature. It can Create, Read, Update & delete multiple user. Also create API key, See API Key & Delete API Key

1. **Account Admin (Type= 201)**

**Description:** A secondary administrator with most of the powers of the Account Super Admin but with restricted control over user types.

**Permission:** Full access to all account feature. It can Create, Read, Update & delete all type of multi user account. But it can’t Update Phone, Address, company Details for Invoicing, Change plan & Delete account button & Change password should not available. Also create API key, See API Key & Delete API Key

1. **Account Full User(Type= 202)**

**Description:** A user with permissions similar to the Account Admin but with limited financial and user management rights

**Permission: It have all permission that Account Admin have except payment setting & Can’t create, Update or send reset password link. Only have option to see the list of Multi user. Account Full User only can check the payment setting not have permission of Update or make changes in it. Account Full User can’t update Auto Payment Setting, Payment Method i.e. Add card, Delete card, Set as Default, Add balance(Add balance section should not available). API key Section should not available for this user**

1. **Account Base User(Type= 203)**

**Description:** A user with permissions similar to the Account Admin but with limitation of Get number

**Permission: It have all permission that Account** Full User **have except get number. Get Number & Cart option should be not available in this account type.**

1. **Accounting Admin User(Type= 231)**

**Description: A user primarily responsible for managing the financial aspects of the account. This account type is used by the CFO.**

**Permission: This user have only limited access i.e. View Invoices, Payment History & Control Payment Settings. Add balance section should also not available. Only billing module is present, And profile section have permission to view only i.e Phone, Address & Company Details for Invoicing.** Change plan, Delete account button & Change password button should not available. **Also not have permission to create or check API key. API key option is not available for this user type**

1. **Accounting Base User(Type= 232)**

**Description: A user with permission similar to the Accounting Admin User except payment setting control**

**Permission: This user have only permission to view Invoices, payment history & Only view payment setting. Modification in the payment setting can’t be done. Only Accounting Base User can check the payment setting not have permission of Update or make changes in it & section are Auto Payment Setting, Payment Method i.e. Add card, Delete card, Set as Default**

**Creating Multi-User Accounts from the Main Customer Account**

1. Log in as Account Super Admin (Customer) whose type is 2 or Account Admin whose type is 201. Only these two account type create multiple user and assign type. According to the type multiple user have permission.
2. Navigate to the Profile icon & then to the “Manage user” section. This section should display list of Multi User table & Add button.

NOTE: Change the name of “Sub Account” into “Manage User”.

1. Create a New User: There should be an option **"Add"** button. Click on it to initiate the user creation process.
2. Enter User details like First name, last name, Email, User name (Unique), Contact and Select type from the Dropdown. Dropdown have list of User type i.e. Account Admin, Account Full User, Account Base User, Accounting Admin User, Accounting Base User. And Submit it.
3. Once submitted then Email verification link is sent to the email id with User name and Set password Link.
4. When User click on the Link then redirected to the set password section. This section have Enter password, Confirm Password, Submit & Reset Button.
5. Password enter and submitted then redirected to the Login page.
6. All Created Multi user will display in the table with status Table column is Customer name(First name + last Name), Email, Contact, User Type, Signup date, Action(Edit, Delete, Reset password icon)
7. Previously created Sub customer will not be removed from the table. Sub customer list will be available with the User type “Sub Customer”
8. Action item of the Sub Customer user type is Edit & Delete. Reset Password icon should not be available.
9. When Account Super Admin or Account Admin edit then have option to change User Type but it not mandatory for the User Type “Sub Customer”. If User type is change then further on its mandatory to select user type at time of edit.
10. When Account Super Admin or Account Admin create new Multi user account or create account for deleted user then One mail id can be used for multiple user account but every account have Unique Username. For Example: If one account delete whose mail id is XYZ@gmail.com & Username is XYZ then if new account is created then XYZ@gmail.com mail id can be use again for multiple account but Username XYZ can’t be user again. When same Username matched then error message display i.e “Username already taken, Please change username”
11. Add User Type at the under the SAN number in the dropdown of when clicking on the Profile icon in Header.
12. In the My profile section, At the place of Username of customer it display the username of Multi user who is login into panel.

**Updating or Action perform an Existing Multi User’s Type (form Account Super Admin i.e Customer & Account Admin)**

1. **Edit**
2. Log in as Account Super Admin or Account Admin and navigate to the Manage User section.
3. Find the user whose type you want to update from the user list.
4. Click on the Edit then popup will open with User details.
5. Only few details are editable i.e First name, Last name, Contact & Type (Dropdown).
6. Click on the Update
7. **Delete**
8. Log in as Account Super Admin or Account Admin and navigate to the Manage User section
9. Find the user whose type you want to update from the user list
10. Click on the Delete then popup will open with confirmation message “Are you sure want to delete the User?” & have “Yes” & “No” button.
11. When click on Yes then User get deleted successfully and removed from the List.
12. **Reset Password**
13. Log in as Account Super Admin or Account Admin and navigate to the Manage User section
14. Find the user whose type you want to update from the user list
15. Click on the reset Password icon then a reset password link sent to the register email id with the Username. And Link sent to the register mail id message display.
16. User click on that link to set password.
17. New page open via clicking on the link have New Password, Confirm password, Submit & Reset Button.
18. After setting password user redirected to the Login page.

**Description of the question mark when select User type at time of Add or Edit**

1. **Account Admin**

**Not Allow**

* Changing invoicing details (Phone, Address and Company Details for Invoicing).
* Changing the plan
* Deleting the account.
* Change password
1. **Account Full User**

**Not Allow**

* Changing invoicing details (Phone, Address and Company Details for Invoicing).
* Changing the plan
* Deleting the account.
* Change password
* Updating Payment setting
* Modify auto-payment setting
* Add balance
* Add or View API key
1. **Account Base User**

**Not Allow**

* Changing invoicing details (Phone, Address and Company Details for Invoicing).
* Changing the plan
* Deleting the account.
* Change password
* Updating Payment setting
* Modify auto-payment setting
* Add balance
* Add or View API key
* Get Number & DID purchase (Cart)
1. **Accounting Admin User**

**Only Access**

* View Invoice
* View payment History
* Control payment setting (Except add Balance)
* View My profile Details
1. **Accounting Base User**

**Only Access**

* View Invoice
* View payment History
* View payment setting
* View My profile Details

**Admin Panel**

1. Change the tool tip of the “Add Sub customer” to “Add Manage User”
2. Update the form of add Manage User, When admin click on the Add manage user icon then form open which contain First name, Last name, Email Id, Username , Contact & User Type dropdown (Account Admin, Account Full User, Account Base User, Accounting Admin User, Accounting Base User).
3. When admin click on the SAN Number then manage user list open and when click on the edit than only First name, Last name, Contact & User type is allowed.
4. Need to add SAN column in the Sub Customer List, when click on the SAN number form the Table of Accounts.

**Forget password**

1. When Admin, Customer or Multi user try to use forget password then click on the Forget password link on the Signup page.
2. Then new page open which contain User Name & Email id field. User enter and submit.
3. System validate that email id belong to that user name the send a mail to the Email id.
4. Email contain the set new password link.
5. New page open via clicking on the link have New Password, Confirm password, Submit & Reset Button.
6. After setting password user redirected to the Login page.