

Default permission groups

Admin

All permits except editing/adding users

Client Management

Adding, modifying and deleting of clients, matters and contacts

Expenses

All permits for disbursements

Finance

All permits for invoices

Financial Admin

In case the Billing workflow is activated, this group determines if a user is part of the financial administration and therefore plays a leading role in the billing workflow

Invoice view *

Viewing all invoices

Reporting

Viewing reports and/or financial information on client- or matter pages

Reporting Management

Adding and modifying reports

Sync accounting

All permits for managing the Twinfield, Exact Online, Exact Financials or Fortnox integration

Timekeeper

Writing and modifying one's own time, viewing clients and matters and adding and modifying disbursements

Time Management

Writing, viewing and modifying time entries (of all timekeepers)

Time view (all time) *

Viewing time entries (of all timekeepers)

User Management

All permits for user management

AML

Accessibility for the AML (Anti-Money Laundering) module (client research)