

Compare new Bankline roles

Roles and permissions						
Here's an overview of what our 6 Bankline roles gives users permission to do across all accounts .						
Table key	Account viewer	Payment raiser	Payment approver	Payment controller	Account leader	Admin
	View balances and transactions.	Raise payments, but not approve.	Approve payments, but not raise.	Raise, manage and approve payments.	Manage payments, accounts & admin.	Manage accounts, users & admin.
Accounts						
View and export account information	●	●	●	●	●	○
Get images of cheques and paying in slips	●	●	●	●	●	○
Payments: View						
Payments	○	●	●	●	●	
Templates (all payment types)	○	●	●	●	●	
Bulk lists	○	●	●	●	●	
Confidential bulk lists	○	○	○	○	○	
Confidential bulk payments	○	○	○	○	○	
Payments: Raise and manage						
Domestic payments and account transfers		●		●	●	
International payments		○		○	○	
Confidential bulk payments		○		○	○	
Import payment files		●		●	●	
Payments: Approve						
Other users' domestic payments and transfers			●	●	●	
Other users' international payments			○	●	●	
Other users' confidential bulk payments			○	○	○	
Own domestic payments and account transfers				○	○	
Own international payments				○	○	
Own confidential bulk payments				○	○	
Release held payments				●	●	
Imported payment files			●	●	●	
Payments: Create and manage templates and bulk lists						
Own templates for domestic payments		●	○	●	●	
Own templates for international payments		○	○	●	●	
Templates created by other users		○	○	●	●	
Bulk lists		○	○	●	●	
Import bulk lists		○	○	●	●	
Confidential bulk lists		○	○	○	○	
Account servicing						
View account servicing requests	●	○	○	○	●	○
Make account servicing requests		○	○	○	●	○
Admin						
View admin settings	○	○	○	○	●	●
Manage admin settings		○	○	○	●	●
Manage users and roles	○	○	○	○	●	●
Manage accounts and customer account sets	○	○	○	○	●	●
Manage payment alerts		○	○	○	●	●
Audit						
View audit records				○	●	○
View Bankline fees				●	●	●
Bankline Mobile						
Use Bankline Mobile	●	●	●	●	●	●
Third Party Providers (TPP)						
Allow TPP payments		○	○	○	●	
Give TPPs access to account information	●	○	○	○	●	
Manage account information consents	○	○	○	○	●	●