



Transact

User access levels and permissions

Employer user roles available in Transact

| Role suitable for... | Purpose is to... | Description |
|---|--|---|
| Employer Master Role <ul style="list-style-type: none"> • Senior Payroll • CFO • Accounts • Operations Management • HR Coordinator • Technology (IT) | Maintain employers and users of the system. Sign off/approve a contribution submission. | This role can : <ul style="list-style-type: none"> • Add, edit, deactivate employers • Add, edit, reset passwords for users • Submit, upload and view contributions • Download and view submissions history • View and edit employee, employer, and user information • Run reports/create custom reports • View payments information and history • Manage users or employer information |
| Employer Clerical Role <ul style="list-style-type: none"> • Payroll Officer • Junior Payroll Admin | Allow for: <ul style="list-style-type: none"> • Upload contribution files, and • View/edit employee data | This role can : <ul style="list-style-type: none"> • Upload and view contributions • Create manual contributions • Download and view submissions history • View employer and user information • Run reports/create custom reports • View payments information and history • View/edit employee information This role can't : <ul style="list-style-type: none"> • Manage users or employers • Submit contributions |
| Employer Viewer Role <ul style="list-style-type: none"> • Staff requiring access for reporting | <ul style="list-style-type: none"> • View only with access to view all data aspects. | This role can : <ul style="list-style-type: none"> • View contribution grid data • Download and view submissions history • Run reports/create custom reports • View payments information and history This role can't : <ul style="list-style-type: none"> • Manage and view users or employers • Upload or submit contributions • Edit employee information |



Creating financial independence since 1846

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Important information

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