Method	Endpoint	Super Admin	Admin	Business Owner	Portfolio Mar	Marketing Mgr	Operations Agent	Support Agent	Advisor	Client
Account					···g·	···g·	rigent	rigent		
GET	/account	All Data	All Data	All clients to which the business is associated	All Data	All Data	All Data	All Data	All Data	All Data
POST	/account	All Data	All Data	All clients to which the business is associated	No Data	No Data	All Data	No Data	All Data	All Data
PUT	/account/{account_id}	All Data	All Data	All clients to which the business is associated	No Data	No Data	All Data	No Data	All accounts to which the client is associated	All accounts to which the client is associated
GET	/account/{account_id}	All Data	All Data	All clients to which the business is associated	All Data	All Data	All Data	All Data	All accounts to which the client is associated	All accounts to which the client is associated
DELETE	/account/{account_id}	All Data	No Data	No Data	No Data	No Data	No Data	No Data	No Data	No Data
GET	/account/{account_id}/asset_size-GET	All Data	All Data	All Data	All Data	All Data	All Data	All Data	All accounts to which the client is associated	All accounts to which the client is associated
GET	/account/{account_id}/holding	All Data	All Data	All Data	All Data	All Data	All Data	All Data	All accounts to which the client is associated	All accounts to which the client is associated
GET	/account/{account_id}/transaction	All Data	All Data	All Data	All Data	All Data	All Data	All Data	All accounts to which the client is associated	All accounts to which the client is associated
GET	/account/{account_id}/performance?stat={stat_id}	All Data	All Data	All accounts to which the business is associated	All Data	All Data	All Data	All Data	All accounts to which the client is associated	All accounts to which the client is associated
GET	/account_permission	All Data	All Data	No Data	All Data	All Data	All Data	All Data	All accounts to which the client is associated	No Data
POST	/account_permission	All Data	All Data	No Data	All Data	All Data	All Data	All Data	All accounts to which the client is associated	No Data
PUT	/account_permission/{account_id}	All Data	All Data	No Data	All Data	All Data	All Data	All Data	All accounts to which the client is associated	No Data
GET	/account_permission/{account_id}	All Data	All Data	No Data	All Data	All Data	All Data	All Data	All accounts to which the client is associated	No Data
DELETE	/account_permission/{account_id}	All Data	All Data	No Data	All Data	All Data	All Data	All Data	All accounts to which the client is associated	No Data
GET	/account_allocation	All Data	All Data	All clients to which the business is associated	All Data	All Data	All Data	All Data	All accounts to which the advisor is associated	All accounts to which the client is associated
POST	/account_allocation	All Data	All Data	All clients to which the business is associated	No Data	No Data	No Data	No Data	All accounts to which the client is associated	All accounts to which the client is associated
PUT	/account_allocation/{account_allocation_id}	All Data	All Data	All clients to which the business is associated	No Data	No Data	No Data	No Data	All accounts to which the client is associated	All accounts to which the client is associated
GET	/account_allocation/{account_allocation_id}	All Data	All Data	All clients to which the business is associated	All Data	All Data	All Data	All Data	All accounts to which the client is associated	All accounts to which the client is associated
DELETE	/account_allocation/{account_allocation_id}	All Data	All Data	All clients to which the business is associated	No Data	No Data	No Data	No Data	All accounts to which the client is associated	All accounts to which the client is associated
POST	/account/{account_id}/subscribe	All Data	All Data	All clients to which the business is associated	No Data	No Data	No Data	No Data	All Data	All Data
GET	/account_status	All Data	All Data	All clients to which the business is associated	All Data	All Data	All Data	All Data	All accounts to which the client is associated	All accounts to which the client is associated
POST	/account_status	All Data	All Data	All clients to which the business is associated	No Data	No Data	All Data	No Data	All accounts to which the client is associated	All accounts to which the client is associated
PUT	/account_status/{account_status_id}	All Data	All Data	All clients to which the	No Data	No Data	All Data	No Data	All accounts to which the client is	All accounts to which the client is
GET	/account_status/{account_status_id}	All Data	All Data	All clients to which the	All Data	All Data	All Data	All Data	All accounts to which the client is	All accounts to which the client is
DELETE	/account_status/{account_status_id}	All Data	All Data	All clients to which the	No Data	No Data	All Data	No Data	associated No Data	associated No Data
GET	/account_type	All Data	All Data	No Data	All Data	All Data	All Data	All Data	All Data	All Data
POST	/account_type /account_type/{account_type_id}	All Data All Data	All Data All Data	No Data No Data	No Data No Data	No Data No Data	All Data All Data	No Data No Data	No Data	No Data
GET	/account_type/{account_type_id}	All Data	All Data	No Data	All Data	All Data	All Data	All Data	All Data	All Data
GET	/account_type/{account_type_id} /account/{account_id}/account_overview	All Data	All Data	No Data All clients to which the	No Data All Data	No Data All Data	All Data	No Data All Data	No Data All accounts to which the client is	No Data All accounts to which the client is
Aggregation	/ account (account_id// account_overview	All Data	All Data	business is associated	All Data	All Data	All Data	All Data	associated	associated
Account									Ability to access records that:	
GET	/aggregation_account	All Data	All Data	All Data	All Data	All Data	All Data	All Data	Contain their own client_id Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that contain their own client_id
POST	/aggregation_account	All Data	All Data	All Data	No Data	All Data	All Data	All Data	Ability to access records that: 1. Contain their own client_id 2. Contain the client_id of a client that is also associated with an account	Ability to access records that contain their own client_id
PUT	/aggregation_account/{aggregation_account_id}	All Data	All Data	All Data	No Data	All Data	All Data	All Data	that this client is associated with Ability to access records that: 1. Contain their own client_id 2. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that contain their own client_id
GET	/aggregation_account/{aggregation_account_id}	All Data	All Data	All Data	All Data	All Data	All Data	All Data	Ability to access records that: 1. Contain their own client_id 2. Contain the client_id of a client that is also associated with an account	Ability to access records that contain their own client_id
									that this client is associated with Ability to access records that:	
DELETE	/aggregation_account/{aggregation_account_id}	All Data	All Data	All Data	No Data	No Data	No Data	No Data	Contain their own client_id Contain the client_id of a client that is also associated with an account that this client is associated with Ability to access records for	No Data
GET	/aggregation_account_balance	All Data	All Data	All Data	No Data	All Data	All Data	All Data	aggrégation accounts that: 1. Contain their own client_id 2. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records for aggregation accounts that contain their own client_id
POST	/aggregation_account_balance	All Data	All Data	All Data	No Data	All Data	All Data	All Data	Ability to access records for aggregation accounts that: 1. Contain their own client_id 2. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records for aggregation accounts that contain their own client_id
PUT	/aggregation_account_balance/ {aggregation_account_balance_id}	All Data	All Data	All Data	No Data	All Data	All Data	All Data	Ability to access records for aggregation accounts that. 1. Contain their own client_id. 2. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records for aggregation accounts that contain their own client_id
GET	/aggregation_account_balance/ {aggregation_account_balance_id}	All Data	All Data	All Data	No Data	All Data	All Data	All Data	Ability to access records for aggregation accounts that: 1. Contain their own client_id 2. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records for aggregation accounts that contain their own client_id
DELETE	/aggregation_account_balance/ (aggregation_account_balance_id)	All Data	All Data	All Data	No Data	No Data	No Data	No Data	that this client is associated with Ability to access records for aggregation accounts that: 1. Contain their own client_id 2. Contain the client_id of a client that is also associated with an account that this client is associated with	No Data
GET POST	/aggregation_account_transaction	All Data All Data	All Data	All Data	No Data No Data	All Data	All Data All Data	All Data	All Data	All Data
PUT	/aggregation_account_transaction /aggregation_account_transaction/	All Data	All Data	All Data	No Data No Data	All Data	All Data	All Data	All Data	All Data
GET	{aggregation_account_transaction_id} /aggregation_account_transaction/	All Data	All Data	All Data	No Data	All Data	All Data	All Data	All Data	All Data
L	{aggregation_account_transaction_id}	Duta	Data	5010	Data	Jata	Jaid	Said		I u.u

Method	Endpoint	Super Admin	Admin	Business Owner	Portfolio	Marketing	Operations	Support	Advisor	Client
DELETE	/aggregation_account_transaction/		All Data	All Data	Mgr No Data	Mgr No Data	Agent No Data	Agent	All Data	
GET	{aggregation_account_transaction_id}	All Data All Data	All Data	All Data	No Data	All Data	All Data	No Data All Data	All Data	No Data All Data
POST	/aggregation_account_holding /aggregation_account_holding	All Data	All Data	All Data	No Data	All Data	All Data	All Data	All Data	All Data
PUT	/aggregation_account_holding/ {aggregation_account_holding_id}	All Data	All Data	All Data	No Data	All Data	All Data	All Data	All Data	All Data
GET	/aggregation_account_holding/ {aggregation_account_holding_id}	All Data	All Data	All Data	No Data	All Data	All Data	All Data	All Data	All Data
DELETE	/aggregation_account_holding/	All Data	All Data	All Data	No Data	No Data	No Data	No Data	All Data	No Data
GET	{aggregation_account_holding_id} /aggregation_account/aggregation_account_id/aggre	All Data	All Data	All Data	No Data	All Data	All Data	All Data	All Data	All Data
OE1	gate_data	All Data	All Data	All Data	NO Data	All Data	All Data	All Data	All Data	All Data
Allocation										
GET	/allocation	All Data	All Data	All Data	All Data	All Data	All Data	All Data	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id 3. Contain the client_id of a client that is also associated with an account that this client is associated with Ability to access records that:	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id
POST	/allocation	All Data	All Data	All Data	All Data	No Data	All Data	No Data	Contain their own client_id Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that: 1. Contain their own client_id
PUT	/allocation/{allocation_id}	All Data	All Data	All Data	All Data	No Data	All Data	No Data	Ability to access records that: 1. Contain their own client_id 2. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that: 1. Contain their own client_id
GET	/allocation/{allocation_id}	All Data	All Data	All Data	All Data	All Data	All Data	All Data	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id 3. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id
DELETE	/allocation/{allocation_id}	All Data	All Data	All Data	All Data	No Data	No Data	No Data	No Data	No data
GET	/allocation/{allocation_id}/asset_size	All Data	All Data	All Data	All Data	All Data	All Data	All Data	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id 3. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id
GET	/allocation/{allocation_id}/holding	All Data	All Data	All Data	All Data	All Data	All Data	All Data	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id 3. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id
GET	/allocation/{allocation_id}/transaction	All Data	All Data	All Data	All Data	All Data	All Data	All Data	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id 3. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id
GET	/allocation/{allocation_id}/performance?stat={stat_id} -GET	All Data	All Data	Ability to access records that: 1. Do not contain a client_id 2. Contain a client_id associated with their business	All Data	All Data	All Data	All Data	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id 3. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id
GET	/allocation/{allocation_id}/aggregate_data	All Data	All Data	All Data	All Data	All Data	All Data	All Data	All Data	All Data
GET	/allocation_composition	All Data	All Data	All Data	All Data	All Data	All Data	All Data	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id 3. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id
POST	/allocation_composition	All Data	All Data	All Data	All Data	No Data	All Data	No Data	Ability to access records that: 1. Contain their own client_id 2. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that: 1. Contain their own client_id
PUT	/allocation_composition/{allocation_composition_id}	All Data	All Data	All Data	All Data	No Data	All Data	No Data	Ability to access records that: 1. Contain their own client_id 2. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that: 1. Contain their own client_id
GET	/allocation_composition/{allocation_composition_id}	All Data	All Data	All Data	All Data	All Data	All Data	All Data	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id 3. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id
DELETE	/allocation_composition/{allocation_composition_id}	All Data	All Data	All Data	All Data	No Data	All Data	No Data	Ability to access records that: 1. Contain their own client_id 2. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that: 1. Contain their own client_id
Benchmark										
GET	/benchmark	All Data	All Data	All Data	All Data	All Data	All Data	All Data	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id 3. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id
POST	/benchmark	All Data	All Data	All Data	All Data	No Data	All Data	No Data	Ability to access records that: 1. Contain their own client_id 2. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that: 1. Contain their own client_id
PUT	/benchmark/{benchmark_id}	All Data	All Data	All Data	All Data	No Data	All Data	No Data	Ability to access records that: 1. Contain their own client_id 2. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that: 1. Contain their own client_id
GET	/benchmark/{benchmark_id}	All Data	All Data	All Data	All Data	All Data	All Data	All Data	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id 3. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id
DELETE	/benchmark/{benchmark_id}	All Data	All Data	All Data	All Data	No Data	All Data	No Data	Ability to access records that: 1. Contain their own client_id 2. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that: 1. Contain their own client_id
GET	/benchmark/{benchmark_id}/asset_size-GET	All Data	All Data	All Data	All Data	All Data	All Data	All Data	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id 3. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id

Method	Endpoint	Super Admin	Admin	Business Owner	Portfolio	Marketing	Operations		Advisor	Client
GET	/benchmark/{benchmark_id}/performance?stat= {stat_id}-GET	All Data	All Data	All Data	Mgr All Data	Mgr All Data	All Data	All Data	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id 3. Contain the client_id of a client that	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id
									is also associated with an account that this client is associated with	
Budget GET	/budget	All Data	All Data	All Data	All Data	All Data	All Data	All Data	All Data	All Data
POST	/budget	All Data	All Data	All Data	All Data	No Data	All Data	No Data	All Data	All Data
PUT	/budget/{budget_id}	All Data	All Data	All Data	All Data	No Data	All Data	No Data	All Data	All Data
GET DELETE	/budget/{budget_id} /budget/{budget_id}	All Data All Data	All Data All Data	All Data	All Data All Data	All Data No Data	All Data All Data	All Data No Data	All Data	All Data
Bulk										
GET POST	/bulk	No Data All Data	No Data All Data	No Data All Data	No Data No Data	No Data No Data	No Data No Data	No Data No Data	No Data No Data	No Data No Data
PUT	/bulk/{bulk_id}	All Data	All Data	All Data	No Data	No Data	No Data	No Data	No Data	No Data
DELETE	/bulk/{bulk_id} /bulk_status/{bulk_status_id}	All Data All Data	All Data All Data	All Data	No Data All Data	No Data All Data	No Data All Data	No Data All Data	No Data All Data	No Data All Data
Business	, some states, (same states)									
GET	/business	All Data	All Data	All businesses to which the business is associated	No Data	No Data	No Data	No Data	No Data	No Data
POST	/business	All Data	All Data	All businesses to which the business is associated	No Data	No Data	No Data	No Data	No Data	No Data
PUT	/business/{business_id}	All Data	All Data	All businesses to which the	No Data	No Data	No Data	No Data	No Data	No Data
GET	/business{business_id}	All Data	All Data	business is associated All businesses to which the	No Data	No Data	No Data	No Data	No Data	No Data
				business is associated All businesses to which the						
DELETE	/business/{business_id}	All Data	All Data	business is associated	No Data	No Data	No Data	No Data	No Data	No Data
GET	/business/{business_id}/asset_size	All Data	All Data	All businesses to which the business is associated	No Data	No Data	No Data	No Data	No Data	No Data
GET	/business/{business_id}/transaction	All Data	All Data	All businesses to which the business is associated	No Data	No Data	No Data	No Data	No Data	No Data
GET	/business/{business_id}/holding	All Data	All Data	All businesses to which the business is associated	No Data	No Data	No Data	No Data	No Data	No Data
Card				- Substituted						
				All cards to which the						
GET	/card	All Data	All Data	business is associated	No Data	All Data	All Data	All Data	All Data	All cards to which the client is associated
POST	/card	All Data	All Data	All cards to which the business is associated	No Data	No Data	All Data	All Data	All Data	All cards to which the client is associated
BUT		411.0	411.0	All cards to which the					AUD.	
PUT	/card/{card_id}	All Data	All Data	business is associated	No Data	No Data	All Data	All Data	All Data	All cards to which the client is associated
GET	/card/{card_id}	All Data	All Data	All cards to which the business is associated	No Data	All Data	All Data	All Data	All Data	All cards to which the client is associated
DELETE	/card/{card_id}	All Data	All Data	All cards to which the	No Data	No Data	All Data	No Data	All Data	All cards to which the client is associated
	, 55.5, (55.5.5)			All cards to which the						All cards to which the business is
GET	/card/{card_id}/asset_size	All Data	All Data	business is associated	All Data	All Data	All Data	All Data	All Data	associated
POST	/card/{card_id}/transaction	All Data	All Data	All cards to which the business is associated	All Data	All Data	All Data	All Data	All Data	All cards to which the business is associated
GET	/card/{card_id}/transaction	All Data	All Data	All cards to which the business is associated	All Data	All Data	All Data	All Data	All Data	All cards to which the business is associated
OFT		All Data	All Data	All cards to which the	No Data	No Dodo	No Date	No Data	N- D-4-	
GET	/card/cardholder_overview	All Data	All Data	business is associated	No Data	No Data	No Data	No Data	No Data	No Data
GET	/card_program	All Data	All Data	All Data	All Data	All Data	All Data	All Data	All Data	All Data
POST	/card_program	All Data	All Data	All cards to which the business is associated	All Data	No Data	All Data	No Data	All Data	All Data
PUT	/card_program/{card_program_id}	All Data	All Data	All cards to which the business is associated	All Data	No Data	All Data	No Data	All Data	All Data
GET	/card_program/{card_program_id}	All Data	All Data	All Data	All Data	All Data	All Data	All Data	All Data	All Data
251575		411.5		411.0					AUD.	415.
DELETE	/card_program/{card_program_id}	All Data	All Data	All Data	All Data	No Data	No Data	No Data	All Data	All Data
Client										
GET	/client	All Data	All Data	All Data	No Data	All Data	All Data	All Data	Ability to access records that: 1. Contain their own client_id 2. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that: 1. Contain their own client_id
POST	/client	All Data	All Data	All Data	No Data	No Data	No Data	No Data	No Data	No Data
PUT	/client/{client_id}	All Data	All Data	All Data	No Data	No Data	No Data	No Data	No Data	Ability to update records that contain their own client_id
GET	/client/{client_id}	All Data	All Data	All Data	No Data	All Data	All Data	All Data	Ability to access records that: 1. Contain their own client_id 2. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that: 1. Contain their own client_id
DELETE	/client/{client_id}	All Data	No Data	No Data	All Data	No Data	No Data	No Data	No Data Ability to access records that:	No Data
GET	/client/{client_id}/asset_size	All Data	All Data	All Data	All Data	All Data	All Data	All Data	1. Contain their own client_id 2. Contain the client_id of a client that is also associated with an account that this client is associated with Ability to access records that:	Ability to access records that contain their own client_id
GET	/client/(client_id)/holding	All Data	All Data	All Data	All Data	All Data	All Data	All Data	Contain their own client_id Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that contain their own client_id
GET	/client/{client_id}/transaction	All Data	All Data	All Data	All Data	All Data	All Data	All Data	Ability to access records that: 1. Contain their own client_id 2. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that contain their own client_id
GET	/client/{client_id}/performance?stat={stat_id}	All Data	All Data	All clients to which the business is associated	All Data	All Data	All Data	All Data	Ability to access records that: 1. Contain their own client_id 2. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that contain their own client_id
GET	/client_response	All Data	All Data	All Data	No Data	All Data	All Data	All Data	Ability to access records that: 1. Contain their own client_id 2. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that contain their own client_id
POST	/client_response	All Data	All Data	All Data	No Data	No Data	All Data	No Data	Ability to access records that: 1. Contain their own client_id 2. Contain the client_id of a client that is also associated with an account that this client is associated with 3. Contain an account_id they are associated with	Ability to access records that: 1. Contain their own client_id 2. Contain an account_id they are associated with

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1	Method	Endpoint	Super Admin	Admin	Business Owner			Agent		Advisor	Client
Company Comp	PUT	/client_response/{client_response_id}	All Data	All Data	All Data	No Data	No Data	All Data	No Data	Contain their own client_id Contain the client_id of a client that is also associated with an account that this client is associated with Contain an account_id they are	Contain their own client_id Contain an account_id they are
Part	GET	/client_response/(client_response_id)	All Data	All Data	All Data	No Data	All Data	All Data	All Data	Contain their own client_id Contain the client_id of a client that is also associated with an account that this client is associated with Contain an account_id they are associated with	Contain their own client_id Contain an account_id they are
Post Monte and	DELETE	/client_response/{client_response_id}	All Data	No Data	No Data	No Data	No Data	No Data	No Data	Contain their own client_id Contain the client_id of a client that is also associated with an account that this client is associated with Contain an account_id they are	Contain their own client_id Contain an account_id they are
Prof. Prof	GET										
Column C											
March Marc	GET					-	-				
A	DELETE	/client_status/{client_status_id}	All Data	All Data		No Data	No Data			No Data	No Data
Auto- Sect	GET	/client/{client_id}/goal_overview	All Data	All Data	All clients associated with the business	All Data	All Data	All Data	All Data	All Data	All Data
Authority Auth	GET	/client/{client id}/advisor overview	All Data	All Data	All clients associated with	No Data	No Data	No Data	No Data	All Data	No Data
Contamination Contaminatio Contamination Contamination Contamination Contamination		-				-	1				
All Pages All		/client/client_id/aggregation_account_overview	All Data	All Data	the business	No Data	All Data	All Data	All Data	All Data	All Data
A Date	Customer										
Authors	GET	/customer	All Data	All Data	All Data	All Data	All Data	All Data	All Data	Contain their own client_id Contain the client_id of a client that is also associated with an account that this client is associated with	
All Date	POST	/customer	All Data	All Data	All Data	No Data	All Data	All Data	All Data	Contain their own client_id Contain the client_id of a client that is also associated with an account that this client is associated with	
All Data	PUT	/customer/{customer_id}	All Data	All Data	All Data	No Data	All Data	All Data	All Data	Contain their own client_id Contain the client_id of a client that is also associated with an account that this client is associated with	
All Data	GET	/customer/{customer_id}	All Data	All Data	All Data	All Data	All Data	All Data	All Data	Contain their own client_id Contain the client_id of a client that is also associated with an account that this client is associated with	
POST	DELETE									Contain their own client_id Contain the client_id of a client that is also associated with an account that this client is associated with	
Post						-	-	+	-		
Deciment All Data All Data All Data All Data All Data No Data No Data No Data No Data All Data Al	PUT										
Decument All Data Al	GET										
All Data All Data All Data All Data All Data All Data No Data No Data No Data No Data All Data All Data All Data No Data No Data No Data No Data All Data All Data All Data All Data All Data All Data No Data	DELETE	/customer_revenue/{customer_revenue_id}	All Data	All Data	All Data	No Data	No Data	No Data	No Data	All Data	No Data
All Data	Document										
POST //document //document_id) All Data All Dat	GET	/document	All Data	All Data	All Data	No Data	No Data	All Data	All Data	Do not contain a client_id Contain their own client_id Contain the client_id of a client that is also associated with an account that this client is associated with Contain an account id the client is associated with	Do not contain a client_id Contain their own client_id Contain an account id the client is
PUT //document//document_id) All Data All Data All Data No Data Socialed with 4. Corntain an account if the client is associated with 4. Cornt	POST	/document	All Data	All Data	All Data	No Data	No Data	All Data	No Data	Do not contain a client_id Contain their own client_id Contain the client_id of a client that is also associated with an account that this client is associated with Contain an account id the client is associated with	Do not contain a client_id Contain their own client_id Contain an account id the client is
All Data All	PUT	/document/(document_id)	All Data	All Data	All Data	No Data	No Data	All Data	No Data	Do not contain a client_id Contain their own client_id Contain the client_id of a client that is also associated with an account that this client is associated with Contain an account id the client is	Do not contain a client_id Contain their own client_id Contain an account id the client is
DELETE //document//document_id) All Data Al	GET	/document/(document_id)	All Data	All Data	All Data	No Data	No Data	All Data	All Data	Do not contain a client_id Contain their own client_id Contain the client_id of a client that is also associated with an account that this client is associated with Contain an account id the client is	Do not contain a client_id Contain their own client_id Contain an account id the client is
All Data	DELETE	/document/(document_id)	All Data	All Data	All Data	No Data	No Data	No Data	No Data	Do not contain a client_id Contain their own client_id Contain the client_id of a client that is also associated with an account that this client is associated with Contain an account id the client is	Do not contain a client_id Contain their own client_id Contain an account id the client is
POST	Decision Tree										
PUT	GET										
GET	POST						-				
DELETE	PUT										
GET //node_relationship All Data All Da	DELETE				No Data						
POST	POST										
PUT /node_relationship/(node_relationship) All Data All Data No Data All Data No Data No Data No Data No Data GET /node_relationship/(node_relationship) All Data No Data No Data DELETE /node_relationship/(node_relationship) All Data All Data No Data No Data No Data No Data GET /node All Data All Data<											
GET //node_relationship/(node_relationship) All Data All Data No Data All Data All Data All Data No Data No Data No Data No Data DELETE /node_relationship/(node_relationship) All Data All Data No Data All Data All Data All Data All Data All Data No Data No Data No Data GET /node All Data All Data No Data All Data No Data	PUT										
GET /node All Data All Data No Data All Data All Data All Data All Data All Data All Data No Data No Data	GET										
	GET					All Data					

Method	Endpoint	Super Admin	Admin	Business Owner	Portfolio	Marketing	Operations		Advisor	Client
PUT	/node/{node_id}	All Data	All Data	No Data	Mgr All Data	Mgr All Data	Agent All Data	Agent No Data	No Data	No Data
GET	/node/{node_id}	All Data	All Data	No Data	All Data	All Data	All Data	All Data	No Data	No Data
DELETE Financial	/node/{node_id}	All Data	All Data	No Data	All Data	All Data	All Data	No Data	No Data	No Data
Statement										
POST	/financial_statement /financial_statement	All Data	All Data All Data	All Data	All Data No Data	All Data All Data	All Data All Data	All Data All Data	All Data	All Data All Data
PUT	/financial_statement/{financial_statement_id}	All Data	All Data	All Data	No Data	All Data	All Data	All Data	All Data	All Data
GET	/financial_statement/{financial_statement_id}	All Data	All Data	All Data	All Data	All Data	All Data	All Data	All Data	All Data
DELETE	/financial_statement/{financial_statement_id}	All Data	All Data	All Data	No Data	No Data	No Data	No Data	All Data	No Data
Funding										
GET	/bank_link	All Data	All Data	All Data	No Data	No Data	No Data	All Data	All accounts to which the client is associated	All accounts to which the client is associated
POST	/bank_link	All Data	All Data	All Data	No Data	No Data	No Data	No Data	All accounts to which the client is associated	All accounts to which the client is associated
PUT	/bank_link/{bank_link_id}	All Data	All Data	All Data	No Data	No Data	No Data	No Data	All accounts to which the client is associated	All accounts to which the client is associated
PUT	/bulk_bank_linkPUT	All Data	All Data	All Data	No Data	No Data	No Data	No Data	All accounts to which the client is associated	All accounts to which the client is associated
GET	/bank_link/{bank_link_id}	All Data	All Data	All Data	No Data	No Data	No Data	All Data	All accounts to which the client is associated	All accounts to which the client is associated
DELETE	/bank_link/{bank_link_id}	All Data	No Data	No Data	No Data	No Data	No Data	No Data	All accounts to which the client is associated	All accounts to which the client is associated
GET	/funding	All Data	All Data	All Data	No Data	All Data	All Data	All Data	All accounts to which the client is	All accounts to which the client is
POST	/funding	All Data	All Data	All Data	No Data	All Data	No Data	No Data	All accounts to which the client is	associated All accounts to which the client is
PUT	/funding/{funding_id}	All Data	All Data	All Data	No Data	All Data	No Data	No Data	associated All accounts to which the client is	associated All accounts to which the client is
									associated All accounts to which the client is	associated All accounts to which the client is
GET	/funding/{funding_id}	All Data	All Data	All Data	No Data	All Data	All Data	All Data	associated All accounts to which the client is	associated All accounts to which the client is
DELETE	/funding/{funding_id}	All Data	No Data	All Data	No Data	All Data	No Data	No Data	associated All accounts to which the client is	associated All accounts to which the client is
GET	/funding_transaction	All Data	All Data	All Data	All Data	All Data	All Data	All Data	associated	associated
POST	/funding_transaction	All Data	All Data	All Data	No Data	No Data	No Data	No Data	All accounts to which the client is associated	All accounts to which the client is associated
PUT	/funding_transaction/{funding_transaction_id}	All Data	All Data	All Data	No Data	No Data	No Data	No Data	All accounts to which the client is associated	All accounts to which the client is associated
GET	/funding_transaction/{funding_transaction_id}	All Data	All Data	All Data	No Data	No Data	All Data	All Data	All accounts to which the client is associated	All accounts to which the client is associated
DELETE	/funding_transaction/{funding_transaction_id}	All Data	All Data	All Data	No Data	No Data	No Data	No Data	All accounts to which the client is associated	All accounts to which the client is associated
GET	/transfer	All Data	All Data	All Data	No Data	No Data	No Data	All Data	All accounts to which the client is associated	All accounts to which the client is associated
POST	/transfer	All Data	All Data	All Data	No Data	No Data	No Data	No Data	All accounts to which the client is	All accounts to which the client is
PUT	/transfer/{transfer_id}	All Data	All Data	All Data	No Data	No Data	No Data	No Data	associated All accounts to which the client is	associated All accounts to which the client is
GET			All Data	All Data			All Data	All Data	associated All accounts to which the client is	associated All accounts to which the client is
	/transfer/{transfer_id}	All Data			No Data	No Data			associated All accounts to which the client is	associated All accounts to which the client is
DELETE	/transfer/{transfer_id}	All Data	No Data	No Data	No Data	No Data	No Data	No Data	associated	associated
Goal										
GET	/goal	All Data	All Data	All Data	All Data	All Data	All Data	All Data	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id 3. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id
POST	/goal	All Data	All Data	All Data	All Data	All Data	All Data	No Data	Ability to access records that: 1. Contain their own client_id 2. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that: 1. Contain their own client_id
PUT	/goal/{goaLid}	All Data	All Data	All Data	All Data	All Data	All Data	No Data	Ability to access records that: 1. Contain their own client_id 2. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that: 1. Contain their own client_id
GET	/goal/{goaLid}	All Data	All Data	All Data	All Data	All Data	All Data	All Data	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id 3. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id
DELETE	/goal/{goaLid}	All Data	All Data	All Data	All Data	No Data	All Data	No Data	Ability to access records that: 1. Contain their own client_id 2. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that: 1. Contain their own client_id
GET	/goal_track	All Data	All Data	All Data	All Data	All Data	All Data	All Data	Ability to access records that have goal_ids which: 1. Do not contain a client_id 2. Contain their own client_id 3. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that have goal_ids which: 1. Do not contain a client_id 2. Contain their own client_id
POST	/goal_track	All Data	All Data	All Data	All Data	All Data	All Data	All Data	Ability to access records that have goal_ids which: 1. Contain their own client_id 2. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that have goal_ids which: 1. Contain their own client_id
PUT	/goal_track/{goal_track_id}	All Data	All Data	All Data	All Data	All Data	All Data	All Data	Ability to access records that have goal_ids which: 1. Contain their own client_id 2. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that have goal_ids which: 1. Contain their own client_id
GET	/goal_track/{goal_track_id}	All Data	All Data	All Data	All Data	All Data	All Data	All Data	Ability to access records that have goal_ids which: 1. Do not contain a client_id 2. Contain their own client_id 3. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that have goal_ids which: 1. Do not contain a client_id 2. Contain their own client_id
DELETE	/goal_track/{goal_track_id}	All Data	All Data	All Data	No Data	No Data	No Data	No Data	No Data	No Data
GET	/goal/(goal_id)/asset_size	All Data	All Data	All Data	No Data	All Data	All Data	All Data	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id 3. Contain the client_id of a client that is also associated with an account that this client is associated with Ability to access records that:	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id
GET	/goal/{goal_id}/holding	All Data	All Data	All Data	No Data	All Data	All Data	All Data	Do not contain a client_id Contain their own client_id Contain their own client_id Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id

Method	Endpoint	Super Admin	Admin	Business Owner	Portfolio Mar	Marketing Mar	Operations		Advisor	Client
					Wigir	Mgr	Agent	Agent	Ability to access records that:	
GET	/goal/{goal_id}/transaction	All Data	All Data	All Data	No Data	All Data	All Data	All Data	Do not contain a client_id Contain their own client_id Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id
GET	/goal/(goaLid)/performance?stat=(stat_id)	All Data	All Data	Ability to access records that: 1. Do not contain a client_id 2. Contain a client_id associated with their business	All Data	All Data	All Data	All Data	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id 3. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id
Household										
GET	/household	All Data	All Data	No Data	No Data	All Data	All Data	All Data	All Data	All Data
POST	/household	All Data	All Data	No Data	No Data	No Data	No Data	No Data	No Data	No Data
PUT GET	/household/{household_id} /household/{household_id}	All Data All Data	All Data All Data	No Data No Data	No Data No Data	No Data All Data	No Data All Data	No Data All Data	No Data All Data	No Data All Data
DELETE	/household/{household_id}	All Data	No Data	No Data	All Data	No Data	No Data	No Data		No Data
GET	/household/{household_id}/holding	All Data	All Data	No Data	All Data	All Data	All Data	All Data	All Data	All Data
GET	/household/{household_id}/asset_size	All Data	All Data	No Data	All Data	All Data	All Data	All Data	All Data	All Data
GET Invoice	/household/{household_id}/transaction	All Data	All Data	No Data	All Data	All Data	All Data	All Data	All Data	All Data
GET	/invoice	All Data	All Data	All Data	All Data	All Data	All Data	All Data	All Data	All Data
POST	/invoice	All Data	All Data	All Data	No Data	All Data	All Data	All Data	All Data	All Data
PUT	/invoice/{invoice_id}	All Data	All Data	All Data	No Data	All Data	All Data	All Data	All Data	All Data
GET	/invoice/(invoice_id)	All Data	All Data	All Data	All Data	All Data	All Data	All Data		All Data
DELETE	/invoice/{invoice_id} /invoice_payment	All Data All Data	All Data All Data	All Data	No Data All Data	No Data All Data	No Data All Data	No Data All Data	All Data	No Data All Data
POST	/invoice_payment	All Data	All Data	All Data	No Data	All Data	All Data	All Data	All Data	All Data
PUT	/invoice_payment/{invoice_payment_id}	All Data	All Data	All Data	No Data	All Data	All Data	All Data	All Data	All Data
GET	/invoice_payment/{invoice_payment_id}	All Data	All Data	All Data	All Data	All Data	All Data	All Data	All Data	All Data
DELETE	/invoice_payment/{invoice_payment_id}	All Data	All Data	All Data	No Data	No Data	No Data	No Data	All Data	No Data
Model									Ability to access records that:	
GET	/model/{model_id}	All Data	All Data	All Data	All Data	All Data	All Data	All Data	Do not contain a client_id Contain their own client_id Contain the client_id of a client that is also associated with an account that this client is associated with Ability to access records that:	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id
POST	/model/{model_id}	All Data	All Data	All Data	All Data	No Data	All Data	No Data	Ability to access records that: 1. Contain their own client_id 2. Contain the client_id of a client that is also associated with an account that this client is associated with Ability to access records that:	Ability to access records that: 1. Contain their own client_id
PUT	/model/{model_id}	All Data	All Data	All Data	All Data	No Data	All Data	No Data	Contain their own client_id Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that: 1. Contain their own client_id
GET	/model/{model_id}	All Data	All Data	All Data	All Data	All Data	All Data	All Data	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id 3. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id
DELETE	/model/{model_id}	All Data	All Data	All Data	All Data	No Data	No Data	No Data	Ability to access records that: 1. Contain their own client_id 2. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that: 1. Contain their own client_id
GET	/model/{model_id}/performance?stat={stat_id}	All Data	All Data	Ability to access records that: 1. Do not contain a client_id 2. Contain a client_id associated with their business	All Data	All Data	All Data	All Data	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id 3. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id
GET	/model_asset_size	All Data	All Data	All Data	All Data	All Data	All Data	All Data	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id 3. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id 3. Contain the client_id of a client that is also associated with an account that this client is associated with an account that this
POST	/model_asset_size	All Data	All Data	All Data	All Data	No Data	All Data	No Data	Ability to access records that: 1. Contain their own client_id 2. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that: 1. Contain their own client_id
PUT	/model_asset_size/{model_asset_size}	All Data	All Data	All Data	All Data	No Data	All Data	No Data	Ability to access records that: 1. Contain their own client_id 2. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that: 1. Contain their own client_id
GET	/model_asset_size/{model_asset_size}	All Data	All Data	All Data	All Data	All Data	All Data	All Data	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id 3. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id
DELETE	/model_asset_size/{model_asset_size}	All Data	All Data	All Data	All Data	No Data	All Data	No Data	Ability to access records that: 1. Contain their own client_id 2. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that: 1. Contain their own client_id
POST	/model/{model_id}/model_change	All Data	All Data	All Data	All Data	No Data	All Data	No Data	Ability to access records that: 1. Contain their own client_id 2. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that: 1. Contain their own client_id
GET	/model_comment	All Data	All Data	All Data	All Data	All Data	All Data	All Data	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id 3. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id
POST	/model_comment	All Data	All Data	All Data	All Data	No Data	All Data	No Data	Ability to access records that: 1. Contain their own client_id 2. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that: 1. Contain their own client_id
PUT	/model_comment/{model_comment_id}	All Data	All Data	All Data	All Data	No Data	All Data	No Data	Ability to access records that: 1. Contain their own client_id 2. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that: 1. Contain their own client_id
GET	/model_comment/{model_comment_id}	All Data	All Data	All Data	All Data	All Data	All Data	All Data	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id 3. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id

Method	Endpoint	Super Admin	Admin	Business Owner	Portfolio	Marketing	Operations		Advisor	Client
					Mgr	Mgr	Agent	Agent	Ability to access records that:	
DELETE	/model_comment/{model_comment_id}	All Data	All Data	All Data	All Data	No Data	All Data	No Data	Contain their own client_id Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that: 1. Contain their own client_id
GET	/model_holding	All Data	All Data	All Data	All Data	All Data	All Data	All Data	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id 3. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id
POST	/model_holding	All Data	All Data	All Data	All Data	No Data	All Data	No Data	Ability to access records that: 1. Contain their own client_id 2. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that: 1. Contain their own client_id
PUT	/model_holding/{model_holding_id}	All Data	All Data	All Data	All Data	No Data	All Data	No Data	Ability to access records that: 1. Contain their own client_id 2. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that: 1. Contain their own client_id
GET	/model_holding/{model_holding_id}	All Data	All Data	All Data	All Data	All Data	All Data	All Data	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id 3. Contain the client_id of a client that is also associated with an account that this client is associated with Ability to access records that:	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id
DELETE	/model_holding/{model_holding_id}	All Data	All Data	All Data	All Data	No Data	All Data	No Data	Contain their own client_id Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that: 1. Contain their own client_id
GET	/model_transaction	All Data	All Data	All Data	All Data	All Data	All Data	All Data	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id 3. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id
POST	/model_transaction	All Data	All Data	All Data	All Data	No Data	All Data	No Data	Ability to access records that: 1. Contain their own client_id 2. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that: 1. Contain their own client_id
PUT	/model_transaction/{model_transaction_id}	All Data	All Data	All Data	All Data	No Data	All Data	No Data	Ability to access records that: 1. Contain their own client_id 2. Contain the client_id of a client that is also associated with an account that this client is associated with Ability to access records that:	Ability to access records that: 1. Contain their own client_id
GET	/model_transaction/{model_transaction_id}	All Data	All Data	No Data	All Data	All Data	All Data	All Data	1. Do not contain a client_id 2. Contain their own client_id 3. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that: 1. Do not contain a client_id 2. Contain their own client_id
DELETE	/model_transaction/{model_transaction_id}	All Data	All Data	All Data	All Data	No Data	All Data	No Data	Ability to access records that: 1. Contain their own client_id 2. Contain the client_id of a client that is also associated with an account that this client is associated with	Ability to access records that: 1. Contain their own client_id
Order										
GET	/order	All Data	All Data	All data to which business is associated	All Data	All Data	All Data	All Data	All accounts to which the client is associated	All accounts to which the client is associated
POST	/order	All Data	All Data	All data to which business is associated	All Data	No Data	All Data	No Data	All accounts to which the client is associated	All accounts to which the client is associated
PUT	/order/{order_id}	All Data	All Data	All data to which business is	All Data	No Data	All Data	No Data	All accounts to which the client is	All accounts to which the client is
GET	/order/{order_id}	All Data	All Data	All data to which business is	All Data	All Data	All Data	All Data	associated All accounts to which the client is	associated All accounts to which the client is
DELETE				associated All data to which business is	All Data				associated All accounts to which the client is	associated All accounts to which the client is
GET	/order/{order_id} /order bulk	All Data	All Data	associated No Data	All Data	No Data All Data	All Data	No Data All Data	associated No Data	associated No Data
POST	/order_bulk	All Data	All Data	No Data	All Data	No Data	All Data	No Data	No Data	No Data
POST	/client/{client_id}/order_bulk	All Data	All Data	No Data	All Data	No Data	All Data	No Data	Ability to access records that: 1. Contain their own client_id 2. Contain the client_id of a client that is also associated with an account that this client is associated with	No Data
		All Data	All Data	No Data	All Data	No Data	All Data	No Data	Ability to access records that: 1. Contain their own client_id 2. Contain the client_id of a client that is also associated with an account that this client is associated with	
POST	/order_status /order_status	All Data All Data	All Data All Data	No Data No Data	All Data All Data	All Data No Data	All Data All Data	All Data No Data	All Data No Data	All Data No Data
PUT	/order_status/{order_status}	All Data	All Data	No Data	All Data	No Data	All Data	No Data	No Data	No Data
GET DELETE	/order_status/{order_status} /order_status/{order_status}	All Data All Data	All Data All Data	No Data No Data	All Data All Data	All Data No Data	All Data All Data	All Data No Data	All Data No Data	All Data No Data
GET	/order_track	All Data	All Data	No Data	All Data	All Data	All Data	All Data	All accounts to which the client is associated	All accounts to which the client is associated
POST	/order_track	All Data	All Data	No Data	All Data	No Data	All Data	No Data	All accounts to which the client is associated	All accounts to which the client is associated
PUT	/order_track/{order_track_id}	All Data	All Data	No Data	All Data	No Data	All Data	No Data	All accounts to which the client is associated	All accounts to which the client is associated
GET	/order_track/{order_track_id}	All Data	All Data	No Data	All Data	All Data	All Data	All Data	All accounts to which the client is	All accounts to which the client is associated
DELETE	/order_track/{order_track_id}	All Data	All Data	No Data	All Data	No Data	All Data	No Data	No Data	No Data
POST	/account/{account_id}/order_rebalance	All Data	All Data	All accounts to which the business is associated	All Data	No Data	All Data	No Data	All accounts to which the client is associated	All accounts to which the client is associated
POST	/account/{account_id}/order_buy_only	All Data	All Data	All accounts to which the business is associated	No Data	No Data	All Data	No Data	All accounts to which the client is associated	All accounts to which the client is associated
POST	/account/{account_id}/order_sell_only	All Data	All Data	All accounts to which the business is associated	No Data	No Data	All Data	No Data	All accounts to which the client is associated	All accounts to which the client is associated
POST	/account/{account_id}/order_sell_all	All Data	All Data	All accounts to which the business is associated	No Data	No Data	All Data	No Data	All accounts to which the client is associated	All accounts to which the client is associated
POST	/portfolio/{portfolio_id}/order_rebalance	All Data	All Data	All accounts to which the	All Data	No Data	All Data	No Data	All accounts to which the client is	All accounts to which the client is
POST	/portfolio/{portfolio_id}/order_buy_only	All Data	All Data	All accounts to which the	No Data	No Data	All Data	No Data	All accounts to which the client is	associated All accounts to which the client is
POST	/portfolio/{portfolio_id}/order_sell_only	All Data	All Data	All accounts to which the	No Data	No Data	All Data	No Data	All accounts to which the client is	All accounts to which the client is
POST	/portfolio/{portfolio_id}/order_sell_all	All Data	All Data	All accounts to which the	No Data	No Data	All Data	No Data	All accounts to which the client is	associated All accounts to which the client is
	, portionology order_sen_an		50.0	business is associated	o Data	Data	. u. Dota	Data	associated	associated
Overflow	(All Dec	All De:	All Date	N- C :	N- P ·	All C	AUC :	All Date	All Date
GET POST	/overflow	All Data All Data	All Data All Data	All Data	No Data No Data	No Data No Data	All Data All Data	All Data All Data	All Data	All Data All Data
GET	/overflow{overflow_id}	All Data	All Data	All Data	No Data	No Data	All Data	All Data	All Data	All Data
POST	/overflow_setting /overflow_setting	All Data All Data	All Data All Data	All Data	No Data No Data	No Data No Data	All Data All Data	All Data	All Data	All Data All Data
GET		All Data	All Data	All Data	No Data	No Data	All Data	All Data	All Data	All Data

					Portfolio	Marketing	Operations	Support		
Method PUT	Endpoint (everflow setting (everflow setting id)	Super Admin All Data	Admin All Data	Business Owner All Data	Mgr No Data	Mgr No Data	Agent All Data	Agent All Data	Advisor All Data	Client All Data
DELETE	/overflow_setting{overflow_setting_id} /overflow_setting{overflow_setting_id}	All Data	All Data	All Data	No Data	No Data	All Data	All Data	All Data	All Data
Portfolio										
GET	/portfolio	All Data	All Data	All Data	All Data	All Data	All Data	All Data	All accounts to which the client is	All accounts to which the client is
POST	/portfolio	All Data	All Data	All Data	All Data	No Data	No Data	No Data	associated All accounts to which the client is	associated All accounts to which the client is
PUT	/portfolio/{portfolio_id}	All Data	All Data	All Data	All Data	No Data	No Data	No Data	All accounts to which the client is	All accounts to which the client is
GET	/portfolio/{portfolio_id}	All Data	All Data	All Data	All Data	All Data	All Data	All Data	associated All accounts to which the client is	associated All accounts to which the client is
									associated All accounts to which the client is	associated All accounts to which the client is
DELETE	/portfolio/{portfolio_id}	All Data	All Data	All Data All accounts to which the	All Data	No Data	No Data	No Data	associated All accounts to which the client is	associated All accounts to which the client is
GET	/portfolio/{portfolio_id}/performance?stat={stat_id}	All Data	All Data	business is associated	All Data	All Data	All Data	All Data	associated All accounts to which the client is	associated All accounts to which the client is
GET	/portfolio_asset_size	All Data	All Data	All Data	All Data	All Data	All Data	All Data	associated All accounts to which the client is	associated All accounts to which the client is
POST	/portfolio_asset_size	All Data	All Data	All Data	All Data	No Data	All Data	No Data	associated All accounts to which the client is	associated All accounts to which the client is
PUT	/portfolio_asset_size/{portfolio_asset_size_id}	All Data	All Data	All Data	All Data	No Data	All Data	No Data	associated	associated
GET	/portfolio_asset_size/{portfolio_asset_size_id}	All Data	All Data	All Data	All Data	All Data	All Data	All Data	All accounts to which the client is associated	All accounts to which the client is associated
DELETE	/portfolio_asset_size/{portfolio_asset_size_id}	All Data	All Data	All Data	All Data	No Data	No Data	No Data	All accounts to which the client is associated	All accounts to which the client is associated
GET	/portfolio_comment	All Data	All Data	All Data	All Data	All Data	All Data	All Data	All accounts to which the client is associated	All accounts to which the client is associated
POST	/portfolio_comment	All Data	All Data	All Data	All Data	No Data	All Data	No Data	All accounts to which the client is associated	All accounts to which the client is associated
PUT	/portfolio_comment/{portfolio_comment_id}	All Data	All Data	All Data	All Data	No Data	All Data	No Data	All accounts to which the client is associated	All accounts to which the client is associated
GET	/portfolio_comment/{portfolio_comment_id}	All Data	All Data	All data	All Data	All Data	All Data	All Data	All accounts to which the client is associated	All accounts to which the client is associated
DELETE	/portfolio_comment/{portfolio_comment_id}	All Data	All Data	All Data	All Data	No Data	All Data	No Data	All accounts to which the client is associated	All accounts to which the client is associated
GET	/portfolio_holding	All Data	All Data	All Data	All Data	All Data	All Data	All Data	All accounts to which the client is associated	All accounts to which the client is associated
POST	/portfolio_holding	All Data	All Data	All Data	All Data	No Data	All Data	No Data	All accounts to which the client is	All accounts to which the client is
PUT	/portfolio_holding/{portfolio_holding_id}	All Data	All Data	All Data	All Data	No Data	All Data	No Data	associated All accounts to which the client is	associated All accounts to which the client is
GET	/portfolio_holding/{portfolio_holding_id}	All Data	All Data	All data	All Data	All Data	All Data	All Data	associated All accounts to which the client is	associated All accounts to which the client is
									associated All accounts to which the client is	associated All accounts to which the client is
DELETE	/portfolio_holding/{portfolio_holding_id}	All Data	All Data	All data	All Data	No Data	All Data	No Data	associated All accounts to which the client is	associated All accounts to which the client is
GET	/portfolio_transaction	All Data	All Data	All Data	All Data	All Data	All Data	All Data	associated All accounts to which the client is	associated All accounts to which the client is
POST	/portfolio_transaction	All Data	All Data	All Data	All Data	No Data	All Data	No Data	associated	associated
PUT	/portfolio_transaction/{portfolio_transaction_id}	All Data	All Data	All Data	All Data	No Data	All Data	No Data	All accounts to which the client is associated	All accounts to which the client is associated
GET	/portfolio_transaction/{portfolio_transaction_id}	All Data	All Data	All Data	All Data	All Data	All Data	All Data	All accounts to which the client is associated	All accounts to which the client is associated
DELETE	/portfolio_transaction/{portfolio_transaction_id}	All Data	All Data	All Data	All Data	No Data	All Data	No Data	All accounts to which the client is associated	All accounts to which the client is associated
GET POST	/portfolio_goal /portfolio_goal	All Data All Data	All Data All Data	All Data	All Data No Data	All Data No Data	All Data No Data	All Data No Data	All Data	All Data All Data
PUT	/portfolio_goal/{portfolio_goal_id}	All Data	All Data	All Data	No Data	No Data	No Data	No Data	All Data	All Data
GET DELETE	/portfolio_goal/{portfolio_goal_id} /portfolio_goal/{portfolio_goal_id}	All Data All Data	All Data All Data	All Data	All Data No Data	All Data No Data	All Data No Data	All Data No Data	All Data All Data	All Data
Questionnaire										
GET	/questionnaire	All Data	All Data	No Data	All Data	All Data	All Data	All Data	All Data	All Data
POST	/questionnaire /questionnaire/{questionnaire_id}	All Data All Data	All Data All Data	No Data No Data	All Data All Data	All Data All Data	All Data All Data	No Data No Data	No Data	No Data
GET	/questionnaire/{questionnaire_id}	All Data	All Data	No Data	All Data	All Data	All Data	All Data	All Data	All Data
DELETE	/questionnaire/{questionnaire_id} /question	All Data All Data	All Data All Data	No Data No Data	All Data	All Data All Data	All Data All Data	No Data All Data	No Data All Data	No Data All Data
POST	/question	All Data	All Data	No Data	All Data	All Data	All Data	No Data	No Data	No Data
PUT GET	/question/{question_id} /question/{question_id}	All Data All Data	All Data All Data	No Data No Data	All Data All Data	All Data All Data	All Data All Data	No Data All Data	No Data All Data	No Data All Data
DELETE GET	/question/(question_id)	All Data All Data	All Data All Data	No Data	All Data	All Data All Data	All Data	No Data	No Data All Data	No Data
POST	/answer	All Data	All Data	No Data No Data	All Data All Data	All Data	All Data All Data	All Data No Data	No Data	All Data No Data
PUT GET	/answer/{answer_id} /answer/{answer_id}	All Data All Data	All Data All Data	No Data No Data	All Data All Data	All Data All Data	All Data All Data	No Data All Data	No Data All Data	No Data All Data
DELETE	/answer/{answer_id}	All Data	All Data	No Data	All Data	All Data	All Data	No Data	No Data	No Data
Resources										
GET	/resource/currency	All Data	All Data	All Data	All Data	All Data	All Data	All Data	All Data	All Data
GET GET	/resource/fx_rate /resource/country	All Data All Data	All Data All Data	All Data	All Data	All Data All Data	All Data All Data	All Data	All Data All Data	All Data All Data
GET GET	/resource/state /resource/account_category	All Data All Data	All Data All Data	All Data All Data	All Data All Data	All Data All Data	All Data All Data	All Data All Data	All Data All Data	All Data
GET	/resource/transaction_category	All Data	All Data	All Data	All Data	All Data	All Data	All Data	All Data	All Data
GET	/resource/merchant /resource/merchant_category_code	All Data All Data	All Data All Data	All Data	No Data All Data	All Data	All Data All Data	All Data All Data	All Data	All Data
GET	/resource/institution	All Data	All Data	All Data	All Data	All Data	All Data	All Data	All Data	All Data
GET Diek Drefile	/resource/statistic	All Data	All Data	All Data	All Data	All Data	All Data	All Data	All Data	All Data
Risk Profile										
GET	/risk_profile	All Data	All Data	All Data	All Data	All Data	All Data	All Data	All Data	All Data
POST	/risk_profile	All Data	All Data	All Data	All Data	No Data	All Data	No Data	All Data	All Data
PUT	/risk_profile/{risk_profile_id}	All Data	All Data	All Data	All Data	No Data	All Data	No Data	All Data	All Data
	, non-prome/ (nan-prome_lu/									
GET	/risk_profile/{risk_profile_id}	All Data	All Data	All Data	All Data	All Data	All Data	All Data	All Data	All Data
DELETE	/risk_profile/{risk_profile_id}	All Data	All Data	All Data	All Data	No Data	No Data	No Data	All Data	All Data
Roundup										
	/dti	All Dec	All Det	All Date	N- D :	All D	All D	All C	All Date	All Date
GET	/round_up_setting	All Data	All Data	All Data	No Data	All Data	All Data	All Data	All Data	All Data
POST	/round_up_setting	All Data	All Data	All Data	No Data	No Data	All Data	All Data	All Data	All Data
			-	-						

Mathad	Fuducius	Com an Admin	Admin	Business Owner	Portfolio	Marketing	Operations	Support	Advisor	Client
Method	Endpoint	Super Admin	Admin	Business Owner	Mgr	Mgr	Agent	Agent	Advisor	Client
GET	/round_up_setting/{round_up_setting_id}	All Data	All Data	All Data	No Data	All Data	All Data	All Data	All Data	All Data
Score										
									Ability to access records for entities	
									that: 1. Do not contain a client_id	Ability to access records for entities that:
GET	/score	All Data	All Data	All Data related to the business	All Data	All Data	All Data	All Data	Contain their own client_id	Do not contain a client_id
									Contain the client_id of a client that is also associated with an account	Contain their own client_id
							-		that this client is associated with Ability to access records for entities	
									that:	A179
POST	/score	All Data	All Data	All Data related to the business	No Data	No Data	All Data	All Data	Do not contain a client_id Contain their own client_id	Ability to access records for entities that: 1. Do not contain a client_id
				Dusiness					Contain the client_id of a client that is also associated with an account	Contain their own client_id
									that this client is associated with	
									Ability to access records for entities that:	
PUT	/score/{score_id}	All Data	All Data	All Data related to the	No Data	No Data	All Data	All Data	Do not contain a client_id Contain their own client_id	Ability to access records for entities that: 1. Do not contain a client_id
				business					Contain the client_id of a client that is also associated with an account	2. Contain their own client_id
									that this client is associated with	
									Ability to access records for entities that:	
GET	/score/{score_id}	All Data	All Data	All Data related to the	All Data	All Data	All Data	All Data	Do not contain a client_id Contain their own client_id	Ability to access records for entities that: 1. Do not contain a client_id
	,, (,			business					3. Contain the client_id of a client that	Contain their own client_id
									is also associated with an account that this client is associated with	
									Ability to access records for entities that:	
DELETE	/score/{score_id}	All Data	All Data	All Data related to the business	No Data	No Data	All Data	All Data	Contain their own client_id Contain the client_id of a client that	Ability to access records that contain their own client_id
				business					is also associated with an account	their own chenicia
									that this client is associated with	
Security										
GET	/security	All Data	All Data	No Data	All Data	All Data	All Data	All Data	All Data	All Data
POST	/security /security/{security_id}	All Data	All Data	No Data	All Data	No Data No Data	All Data	No Data No Data	No Data No Data	No Data
GET	/security/(security_id)	All Data	All Data	No Data	All Data	All Data	All Data	All Data	All Data	All Data
DELETE	/security/{security_id}	All Data	All Data	No Data	All Data	No Data	All Data	No Data	No Data	No Data
GET	/security/{security_id}/performance?stat={stat_id}	All Data	All Data	All Data No Data	All Data	All Data	All Data	All Data	All Data	All Data
POST	/security_price /security_price	All Data	All Data	No Data	All Data	No Data	All Data	No Data	No Data	No Data
PUT	/security_price/{security_price_id}	All Data	All Data	No Data	All Data	No Data	All Data	No Data	No Data	No Data
GET	/security_price/{security_price_id}	All Data	All Data	No Data	All Data	All Data	All Data	All Data	All Data	All Data
DELETE	/security_price/{security_price_id}	All Data	All Data	No Data	All Data	No Data	All Data	No Data	No Data Ability to access records that:	No Data
									Contain their own client_id	Ability to access records that:
GET	/security_exclusion	All Data	All Data	All Data	All Data	All Data	All Data	All Data	Contain the client_id of a client that is also associated with an account	Contain their own client_id Contain an account_id they are
									that this client is associated with 3. Contain an account_id they are	associated with
						_			associated with	
									Ability to access records that: 1. Contain their own client_id	Ability to access records that:
POST	/security_exclusion	All Data	All Data	All Data	All Data	No Data	All Data	No Data	Contain the client_id of a client that is also associated with an account	Contain their own client_id
									that this client is associated with 3. Contain an account_id they are	Contain an account_id they are associated with
									associated with	
									Ability to access records that: 1. Contain their own client_id	Ability to access records that:
PUT	/security_exclusion/{security_exclusion_id}	All Data	All Data	All Data	All Data	No Data	All Data	No Data	Contain the client_id of a client that is also associated with an account	Contain their own client_id
	,,, (,,								that this client is associated with	Contain an account_id they are associated with
									Contain an account_id they are associated with	
									Ability to access records that: 1. Contain their own client_id	ALTS .
GET	/security_exclusion/{security_exclusion_id}	All Data	All Data	All Data	All Data	All Data	All Data	All Data	Contain the client_id of a client that is also associated with an account	Ability to access records that: 1. Contain their own client_id
021	, security_excitation, (security_excitation_la)	/ III Data	7 III Data	7 iii Bata	/ iii bata	7.11. 5010	7 til Data	/ III Data	that this client is associated with	Contain an account_id they are associated with
									Contain an account_id they are associated with	
									Ability to access records that: 1. Contain their own client id	
DELETE	/security_exclusion/{security_exclusion_id}	All Data	All Data	All Date	All Date	N- D-4-	All Data	N - D-4-	2. Contain the client_id of a client that	Ability to access records that: 1. Contain their own client_id
DELETE	/security_exclusion/{security_exclusion_id}	All Data	All Data	All Data	All Data	No Data	All Data	No Data	is also associated with an account that this client is associated with	Contain an account_id they are associated with
L						L	<u>L</u>		Contain an account_id they are associated with	
Spending Control										
GET	/spending_control	All Data	All Data	All Data	No Data	All Data	All Data	All Data	All Data	All Data
POST	/spending_control	All Data	All Data	All Data	No Data	No Data	All Data	All Data	All Data	All Data
PUT	/spending_control/{spending_control_id}	All Data	All Data	All Data	No Data	No Data	All Data	All Data	All Data	All Data
GET DELETE	/spending_control/{spending_control_id} /spending_control/{spending_control_id}	All Data	All Data	All Data	No Data No Data	All Data No Data	All Data	All Data	All Data	All Data
		310			Data	50.0	50.0	Suta		
Utils		1								
POST	/application	All Data	All Data	No Data	All Data	All Data	All Data All Data	All Data	All Data	All Data
PUT	/application/ /application/{application_id}	All Data	All Data	No Data	All Data	All Data	All Data	All Data	All Data	All Data
GET	/application/{application_id}	All Data	All Data	No Data	All Data	All Data	All Data	All Data	All Data	All Data
DELETE	/application/{application_id}	All Data	All Data	No Data All Data	All Data All Data	All Data	All Data	All Data	All Data All Data	All Data
POST	/audit_log /audit_log	All Data	All Data	All Data	All Data	All Data	All Data	All Data	All Data	All Data
GET	/audit_log/{audit_log_id}	All Data	All Data	All Data	All Data	All Data	All Data	All Data	All Data	All Data
GET	/feature	All Data	All Data	No Data	No Data	All Data	All Data	All Data	No Data	No Data
POST	/feature /feature/{feature_id}	All Data	All Data All Data	No Data No Data	No Data No Data	All Data	All Data All Data	All Data	No Data No Data	No Data
GET	/feature/(feature_id)	All Data	All Data	No Data	No Data	All Data	All Data	All Data	No Data	No Data
DELETE	/feature/{feature_id}	All Data	All Data	No Data	No Data	All Data	All Data	All Data	No Data	No Data
GET	/feature_track	All Data	All Data	All Data	No Data	All Data	All Data	All Data	No Data	No Data
POST	/feature_track /feature_track_id}	All Data	All Data	All Data	No Data No Data	All Data	All Data	All Data	No Data No Data	No Data
GET	/feature_track/(feature_track_id)	All Data	All Data	All Data	No Data	All Data	All Data	All Data	No Data	No Data
DELETE	/feature_track/{feature_track_id}	All Data	All Data	All Data	No Data	All Data	All Data	All Data	No Data	No Data
GET POST	/notification /notification	All Data	All Data All Data	No Data No Data	All Data No Data	All Data	All Data	All Data No Data	All Data No Data	All Data No Data
PUT	/notification/(notification_id)	All Data	All Data	No Data	No Data	All Data	All Data	No Data	No Data	No Data
-				1		1	1		1	

Method	Endpoint	Super Admin	Admin	Business Owner	Portfolio Mgr	Marketing Mgr	Operations Agent	Support Agent	Advisor	Client
GET	/notification/{notification_id}	All Data	All Data	No Data	All Data	All Data	All Data	All Data	All Data	All Data
DELETE	/notification/{notification_id}	All Data	All Data	No Data	No Data	All Data	All Data	No Data	No Data	No Data
GET	/notification_setting	All Data	All Data	All Data	No Data	All Data	All Data	All Data	All Data	All Data
POST	/notification_setting	All Data	All Data	All Data	No Data	No Data	All Data	All Data	All Data	All Data
PUT	/notification_setting/{notification_setting_id}	All Data	All Data	All Data	No Data	No Data	All Data	All Data	All Data	All Data
GET	/notification_setting/{notification_setting_id}	All Data	All Data	All Data	No Data	All Data	All Data	All Data	All Data	All Data
DELETE	/notification_setting/{notification_setting_id}	All Data	All Data	All Data	No Data	No Data	All Data	All Data	All Data	All Data
GET	/notification_client	All Data	All Data	All Data	No Data	All Data	All Data	All Data	All Data	All Data
POST	/notification_client	All Data	All Data	All Data	No Data	No Data	All Data	All Data	All Data	All Data
PUT	/notification_client/{notification_client_id}	All Data	All Data	All Data	No Data	No Data	All Data	All Data	All Data	All Data
GET	/notification_client/{notification_client_id}	All Data	All Data	All Data	No Data	All Data	All Data	All Data	All Data	All Data
DELETE	/notification_client/{notification_client_id}	All Data	All Data	All Data	No Data	No Data	All Data	All Data	All Data	All Data
GET	/reason_code	All Data	All Data	No Data	All Data	All Data	All Data	All Data	All Data	All Data
POST	/reason_code	All Data	All Data	No Data	All Data	No Data	All Data	No Data	No Data	No Data
PUT	/reason_code/{reason_code_id}	All Data	All Data	No Data	All Data	No Data	All Data	No Data	No Data	No Data
GET	/reason_code/{reason_code_id}	All Data	All Data	No Data	All Data	All Data	All Data	All Data	All Data	All Data
DELETE	/reason_code/{reason_code_id}	All Data	All Data	No Data	All Data	No Data	All Data	No Data	No Data	No Data
GET	/stage	All Data	All Data	No Data	All Data	All Data	All Data	All Data	All Data	All Data
POST	/stage	All Data	All Data	No Data	No Data	All Data	All Data	No Data	No Data	No Data
PUT	/stage/{stage_id}	All Data	All Data	No Data	No Data	All Data	All Data	No Data	No Data	No Data
GET	/stage/{stage_id}	All Data	All Data	No Data	All Data	All Data	All Data	All Data	All Data	All Data
DELETE	/stage/{stage_id}	All Data	All Data	No Data	No Data	All Data	All Data	No Data	No Data	No Data
GET	/transaction_code	All Data	All Data	No Data	All Data	All Data	All Data	All Data	All Data	All Data
POST	/transaction_code	All Data	All Data	No Data	All Data	No Data	All Data	No Data	No Data	No Data
PUT	/transaction_code/{transaction_code_id}	All Data	All Data	No Data	All Data	No Data	All Data	No Data	No Data	No Data
GET	/transaction_code/{transaction_code_id}	All Data	All Data	No Data	All Data	All Data	All Data	All Data	All Data	All Data
DELETE	/transaction_code/{transaction_code_id}	All Data	All Data	No Data	All Data	No Data	All Data	No Data	No Data	No Data