

Method	Endpoint	Super Admin	Admin	Business Owner	Portfolio Mgr	Marketing Mgr	Operations Agent	Support Agent	Advisor	Client
GET	/benchmark/{benchmark_id}/performance?stat={stat_id}-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
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	/budget/{budget_id}	All Data	All Data	All Data	All Data	All Data	All Data	All Data	All Data	All Data
DELETE	/budget/{budget_id}	All Data	All Data	All Data	All Data	No Data	All Data	No Data	All Data	All Data
Bulk										
GET	/bulk	No Data	No Data	No Data	No Data	No Data	No Data	No Data	No Data	No Data
POST	/bulk	All Data	All Data	All 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}	All Data	All Data	All Data	No Data	No Data	No Data	No Data	No Data	No Data
GET	/bulk_status/{bulk_status_id}	All Data	All Data	All Data	All Data	All Data	All Data	All Data	All Data	All Data
Business										
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 business is associated	No Data	No Data	No Data	No Data	No Data	No Data
GET	/business/{business_id}	All Data	All Data	All businesses to which the business is associated	No Data	No Data	No Data	No Data	No Data	No Data
DELETE	/business/{business_id}	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}/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										
GET	/card	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
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
PUT	/card/{card_id}	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
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 business is associated	No Data	No Data	All Data	No Data	All Data	All cards to which the client is associated
GET	/card/{card_id}/asset_size	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
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
GET	/card/cardholder_overview	All Data	All Data	All cards to which the 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
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	No Data
GET	/client/{client_id}/asset_size	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}/holding	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}/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

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