

CONTROL

Workflow permissions map

A sample separation between routine support, approval-required actions and decisions that remain exclusively with the business owner.

Routine support

ClearDesk may proceed under documented rules.

Client approval

Work pauses until the client gives a recorded decision.

Owner only

ClearDesk records and escalates but cannot perform the action.

ACTIVITY	CLEARDESK MAY COMPLETE	CLIENT APPROVAL REQUIRED	OWNER-ONLY DECISION
Record and categorise a new enquiry	✓	—	—
Send an approved acknowledgement	✓	—	—
Schedule within shared availability	✓	—	—
Prepare a proposal from approved rates	Prepare draft	✓ Review	—
Change pricing or commercial terms	—	Escalate	✓
Sign a contract or make a binding commitment	—	—	✓
Access banking credentials or make payments	—	—	✓
Close or delete a client record	—	✓	—

Scope principle: permissions are agreed per workflow and may be reduced at any time. Delegation does not transfer pricing, contractual, banking or professional authority to ClearDesk.