User Permissions

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Overview

ServiceMinder controls what each user can see and do through three layers, all configured onthe user edit page (Users → click a user → Permissions tab).

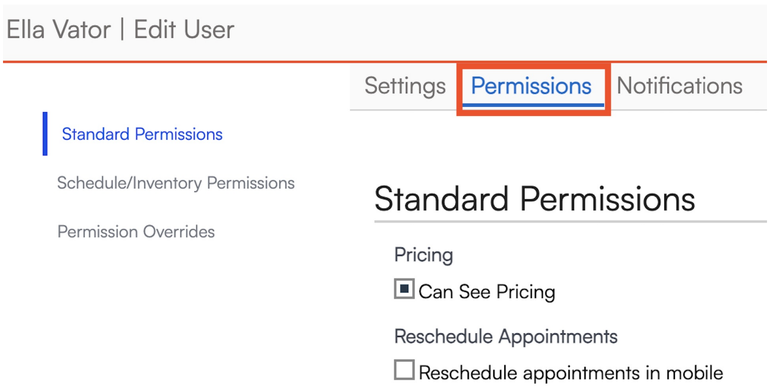
- **Standard Permissions** — settings that apply to every user, like whether they can seepricing or transfer appointments.
- **Schedule/Inventory Permissions** — settings that only appear for users who are also Service Agents, controlling their mobile-app capabilities and schedule visibility.
- **Permission Overrides** — a row-by-row grant/deny table for the system's full permission catalog, used to fine-tune access on top of the user's assigned Role.

Each section below explains the controls in plain language with examples. Where a setting istied to another configuration (an organization-level toggle, a brand setting, or a Role), that iscalled out.

This article will review:

Settings and Navigation

To access the full list of permissions you must go to **Control Panel > User > Permissions** tab. Listed below are all of the permissions that can be granted or denied for Users. This allows you to have control over what each user can see and do inside of service**minder**.



If a User does not have access to a certain feature or location in service**minder**, they will be prompted with a red banner stating they don't have permission and bumped back to the login page.

Standard Permissions

Setting	Description	Use Case
Pricing ("Can See Pricing")	Controls whether the user sees price information across the system. With this off, costs, totals, and margins are hidden on appointments, proposals, invoices, and parts.	Disable for a field tech who shouldn't quote on the spot can be sent to appointments without ever seeing the customer's price.
Reschedule Appointments	Lets the user move an appointment to a different time on the mobile app.	Without this, a service agent on mobile can view their schedule but cannot drag an appointment to a new slot.
Transfer Appointments	Lets the user reassign an appointment to a different service agent from the mobile app.	Useful for crew leads who need to hand off jobs in the field; revoke for techs who should only work their own assignments.
Slot Searching ("Limit all slots results to this user")	When checked, the "Find a Slot" tool on an appointment scheduling page only returns openings on this user's own calendar.	Use this for team members who should only book appointments for themselves; leave un checked for owners or schedulers who book across the whole team.
Searching	Controls the scope of the global contact search - none, owned contacts, or all contacts.	Example: a sales rep set to Owned Contacts won't accidentally surface another rep's customers.
Include Member Orgs ("Search all member organizations")	This setting expands searches to also cover member organizations the user belongs to.	Useful for owners with multiple organizations or brand administrators.
Proposals	Controls which proposals appear in the user's proposal grids. **Owned** shows only proposals the user created or is assigned to. **All** shows every proposal in the organization.	Example: set sales reps to Owned so they only see their own pipeline.
Send Invoice Approvals To	Routes invoices generated by this user to another user for approval before they can be sent out.	Useful so that an office manager or owner can review the details on an invoice create by a junior team member instead of being sent out automatically.

Schedule/Inventory Permissions

This section only appears if the user is linked to a Service Agent record.

Setting	Description	Use Case

Setting	Description	Use Case
Track Inventory?	Turns on per-agent inventory tracking for this service agent, so parts used on appointments are pulled from this agent's truck stock. Only appears when the organization has agent inventory management enabled.	Enable for technicians who carry stock in their vans that you want to manage inventory for.
CC Appointment Confirmations	When the customer receives an appointment confirmation email, this agent is CC'd.	Useful for agents who want a paper trail of every confirmed visit on their schedule.
Can Self Edit Inventory	Lets the agent adjust their own truck inventory counts from the mobile app. Only applies when the organization has inventory management enabled.	Without this, only office users with inventory permissions can correct counts.
Can Alter Start/Finish	Lets the agent edit the actual start and finish times when completing an appointment. Without this, the times recorded by the app are final.	Leave this permission off if you bill by tracked time and don't want service agents adjusting the time after the fact.
Pull From Queue?	Lets the agent pull unassigned appointments out of the dispatch queue onto their own schedule.	Enable for senior technicians who can self-assign when they have an opening; leave off for techs who should only work what dispatch hands them.
Future Visibility	The number of days this user can see ahead on their service agent's schedule.	Example: set to 7 and the agent sees this week's work but not next month's. Useful when schedules are still being shuffled and you don't want techs reacting to tentative bookings.
Hide Future on Details?	Hides any future appointments for the same customer when this agent opens an appointment's details page.	Use to keep service agents focused on today's visit without seeing what's already booked next.
Login Restrictions	Prevents the agent from signing into the mobile app outside their normal work hours, plus the buffer specified.	Example:30 / 30 means they can log in 30 minutes before their first appointment and stay logged in up to 30 minutes after their last. Useful for hourly compliance.

Permission Overrides

This is the catalog of granular permissions. Each user is assigned a Role, and the Role gives them a baseline set of permissions. The Permission Overrides table lets you grant a permission their Role doesn't include, or deny one it normally does, for this single user.

Appointments Permissions

Permission	What it Controls
Appointments:Email	Email an appointment confirmation to the customer.
Appointments:Finish:AddParts	Add parts to an appointment while finishing it (consumes inventory and adds line items).
Appointments:Finish:SendCompletion	Send the completion email to the customer when finishing an appointment.
Appointments:Grid:All	See the All Appointments grid.
Appointments:Grid:Backlog	See the Backlog grid.
Appointments:Grid:InProgress	See the In Progress appointments grid.
Appointments:Grid:Last	See the Last (recently completed) appointments grid.
Appointments:Grid:Reworks	See the Reworks grid — jobs that came back.
Appointments:Grid:Upcoming	See the Upcoming Appointments grid.
Appointments:Notes:Private	View and post private (internal-only) notes on appointments

Contacts Permissions

Permission	What it Controls
Contacts	Base access to the Contacts area.
Contacts:Create	Create a new contact.
Contacts:Documents:ViewPrivate	View documents flagged Private on a contact.
Contacts:Delete	Delete contacts.*
Contacts:Edit	Edit any contact in the organization (broadest editpermission).
Contacts:Edit:Owned	Edit only contacts the user owns. Pair with no Contacts:Editfor a rep who should only touch their own customers.
Contacts:Edit:Unowned	Edit contacts that have no assigned owner. Useful for leadrouting staff.
Contacts:Grid:All	See the All Contacts grid/tab.
Contacts:Grid:Expired	See the Expired Contacts grid.
Contacts:Grid:Expiring	See the Expiring Contacts grid.
Contacts:Location:Update	Update a contact's address or location.
Contacts:Merge	Merge duplicate contact records.
Contacts:Notes	Add and edit notes on a contact.
Contacts:Notes:ViewPrivate	View notes flagged Private on a contact.
Contacts:View	View contact records (without this, the user can't see contacts at all).

Permission	What it Controls
Contacts:View:CommunicationDetails	See the full communications history (calls, texts, emails) on acontact, not just the summary.

Invoices and Payments Permissions

Permission	What it Controls
Invoices	Grants permission for viewing invoices, processing and managing payments, sending invoices to customers, managing installment and recurring billing activity, merging/splitting invoices, applying finance charges, and performing other invoice-related actions.
Invoices:Approve	Approve invoices for sending and accounting.
Invoices:Delete	Delete invoices.*
Invoices:Edit	Edit invoices.
Invoices:ExcludefromEndofPeriod	Flag an invoice as excluded from end-of-period royalty reporting — typically for adjustments that shouldn't roll into the next reporting period.
Invoices:Grid:All	See the All Invoices grid.
Invoices:Grid:Open	See open invoices on the grid.
Invoices:Grid:Paid	See paid invoices on the grid.
Invoices:Grid:Unapproved	See invoices waiting on approval.
Invoices:Void	Void an invoice.
Invoices:WriteOff	Write off invoices as uncollectible.
Pay:Account	Access ServiceMinder|Pay account settings.
Pay:Reporting	View ServiceMinder|Pay reports.
Payments:Delete	Delete a payment record.*
Payments:Refund	Issue a refund for a payment.

Parts and Services Permissions

Permission	What it Controls
Organization:Parts	View the list of Parts.
ControlPanel:Parts:Create	Add new parts.
ControlPanel:Parts:Edit:General	Edit the non-pricing and non-inventory fields on a part.
ControlPanel:Parts:Edit:Pricing	Edit price/cost fields on a part.
ControlPanel:Parts:Index	View the Parts list in Control Panel.
ControlPanel:Parts:Inventory	Edit inventory counts and locations on a part.
ControlPanel:Services:Create	Create new services.

Permission	What it Controls
ControlPanel:Services:Edit:General	Edit non-pricing fields on a service.
ControlPanel:Services:Edit:Pricing	Edit price-related fields on a service.
ControlPanel:Services:Index	View the Services list in Control Panel.

Proposals Permissions

Permission	What it Controls
Proposals	Top-level access to proposals.
Proposals:BulkAccept	Bulk-accept proposals from the proposals grid.
Proposals:Delete	Delete proposals.*
Proposals:EditAccepted	Edit a proposal after the customer has accepted it.
Proposals:Email	Enables the "Email" action on proposals which uses an ad hoc email template that you create.
Proposals:Grid:All	See the All Proposals grid.
Proposals:Grid:Accepted	See accepted proposals.
Proposals:Grid:Open	See the Open Proposals grid.
Proposals:Grid:OpenProjects	See the Open Projects grid. (Learn about Project Based Workflow).
Proposals:Grid:Unscheduled	See proposals that haven't been scheduled yet.
Proposals:Grid:Won	See won proposals.
Proposals:MarkComplete	Manually mark a proposal as complete.
Proposals:Margins:View	View margin and cost figures on proposals (separate from pricing view).
Proposals:Send	Enables the "Send" action on proposals which uses automated templates to email or text a link to the proposal (depending on the contact's communication preferences).

Organization Configuration Permissions

Permission	What it Controls
ControlPanel:ApiKeys	Manage organization-level API keys in the Control Panel.
Organization	Broad organization-level admin permission that grants access to the Control Panel; parent of most Organization permissions.
Organization: Account	Manage the organization's billing and account information.
Organization: Custom Fields	Manage custom fields for contacts, appointments, services, etc.
Organization: Email Campaigns	Manage email campaigns at the org level.
Organization: Email Templates	Manage email templates (both automated and ad-hoc) at the org level.

Permission	What it Controls
Organization: Invoice Terms	Edit invoice terms text on the org. (Brand-level setting mustalso permit org-edit.)
Organization: Marketing Tools	Access marketing tools.
Organization: Owner	Marks the user as an organization owner.
Organization: QBO Connection	Connect and manage the QuickBooks Online integration.
Organization: Service Agents	Manage service-agent profiles, capacities, and zones.
Organization: Settings	Edit organization's General Settings as well as Categories, Tags, and Labels.
Organization: Users	Create, edit, and remove users. Required to even reach most of the User Edit page.

System Administration & Branding Permissions

Permission	What it Controls
Branding	Brand-level administration. Includes managing branding settings, accounting classes, automations, billing, etc. across the whole brand from the Dashboard.
Branding:ApiKeys	Manage brand-level API keys used by integrations.
Branding: Email Campaigns: Create	Create brand level email campaigns that can be deployed out to organizations.
Branding:ReportSubscription	Subscribe to regular report downloads within the brand.
Organizations: Roles	Manage Roles and billing plans. Needed to add or change which permissions a Role grants
User: Impersonation	Allows the user to view and act as another user within service**minder**. Use sparingly (typically reserved for support and brand administrators).

Permissions for Add-On Features

These permissions require that your organization and/or brand has the related add-on feature included in your plan.

Permission	What it Controls
Campaigns	Access the Campaigns section of the Control Panel.
Campaigns:Create	Create marketing Channels and Campaigns.
Drips	Access the Drips section of the toolbar and manage drip campaigns.
Feedback	Access the Feedback grid and control settings for collecting customer feedback.
Issues:Edit	Edit the Issues Management workflow.

Permission	What it Controls
Pages	Access the Pages module in the Administration section of the toolbar and make adjustments to the settings there.
Routing	Use Fleet Routing to route queued appointments across multiple service agents or teams.
Text Messaging	Access the Texting area and send/receive text messages.

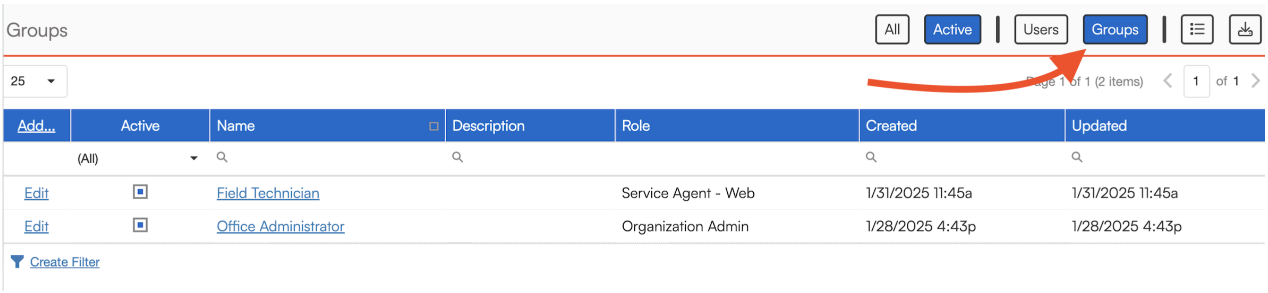
Other Permissions

Permission	What it Controls
App	Grants access to the App (mobile) interface only.
Calendar	View the organization's calendar.
Call Center	Access the Call Center area.
CallCenter:Request Call Credit	Request a call credit on a recorded call (e.g., the call was a misdial).
CallCenter:Review Call Audio	Listen to and review recorded call audio.
Dispatch	Access the Dispatch tab in the toolbar
Dispatch:Appointments:Notes	Add or edit notes on appointments from inside the Dispatch view.
Maps	Access Maps.
My Schedule:Appointments	Access the personal "My Schedule" view.
Reports	Access the Reports for the organization.
ServiceAgents:TimeOff:Create	Create time-off entries for service agents.
Subcontractors:Bids	Submit subcontractor bids.
Subcontractor:Review:Bids	Review submitted contractor bids.
Taskboard:Content:Update	Update taskboard content (add, remove, or move cards between columns).
Tasks	Access the tasks list.
Tasks:Complete	Mark tasks as complete.
View:OwnedBy:Me	See records (appointments, contacts, proposals, invoices) that the current user owns. Without this, the user can't even see their own records.
View:OwnedBy:Others	See records owned by other users. Revoke to scope someone strictly to their own work.
View:OwnedBy:Nobody	See records with no assigned owner (e.g., new leads not yet routed).
Web	Grants access to both the Web (desktop) and App (mobile) interfaces.

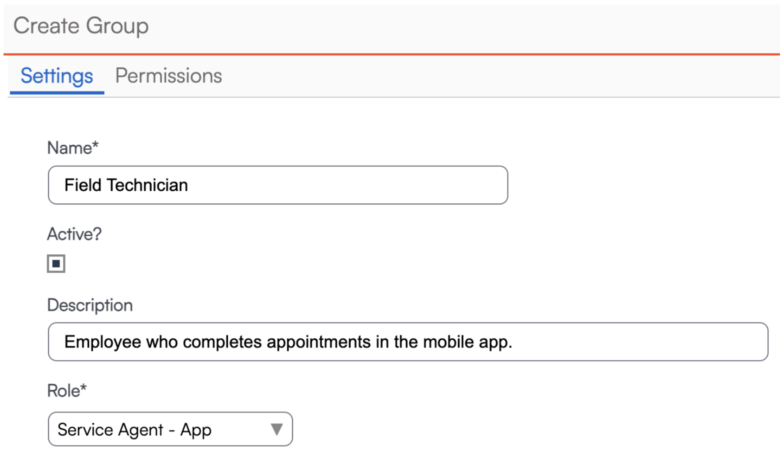
*If your account has been granted delete permissions, **use extreme caution when removing records**. Deleted items are typically recoverable within 4 weeks of deletion. Submit a support ticket for assistance. A **$250 data restoration fee** may apply for recovery requests involving mistakenly deleted data.

Permission Groups

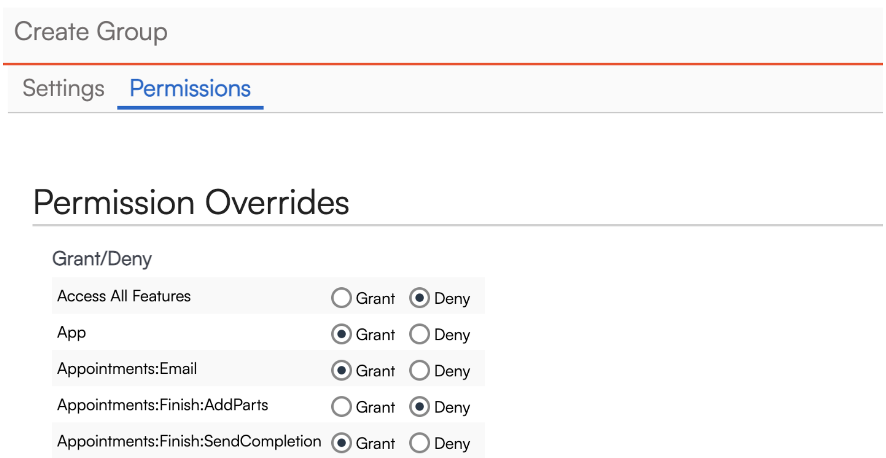
In **Control Panel > Users**, click **Groups** in the top right corner. This will take you to a page where you can create custom groups of Users in order to assign Permissions consistently to all users within that group.



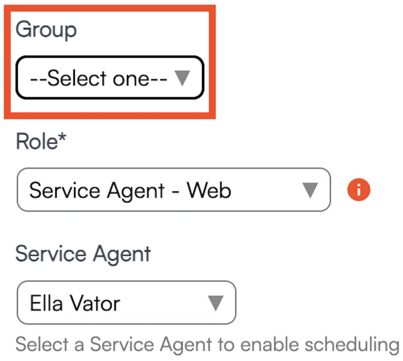
From there, you can click **Add** where you will be prompted to create a Name, Description, and User Role for anyone included in this group.



Then, you'll click the Permissions tab and grant or deny each permission.



Then, when editing a User, you will be able to assign them a group. This will automatically adjust their permissions to correspond with the ones you assigned to that user group.



FAQs

What types of users have the ability to change user permissions?

By default, Org Admin and Owner are the only two roles that have access to Control Panel. User and Service Agent Web do not have access to Control Panel Only the Org Admin and Owner roles can grant additional access. If they grant those things to a User or Service Agent - web than they can access Users. They will only be able to "edit" a user who has their same permission or lower and then they can grant/deny permission but again only will list things that they already have access to.

Do we have to set permissions so that users can go in and add their email and password for calendar synchronization on their own profile?

Nope, for any user you can go to the wheel that's in the upper right-hand corner by your username, if you click that it takes you to your personal user settings. From there you had sync your google calendar. We see that Outlook sync is not displaying there and we will get that added to that page.