User Permissions

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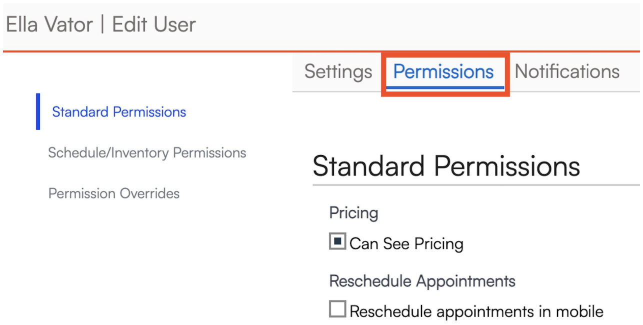
Overview

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.
Note that some permissions won't be visible to Users depending on their role in service**minder**.

Standard Permissions

- **Pricing** ("Can See Pricing") - controls who can see proposal pricing and makes the web functionality match the mobile app functionality a little more. If a user doesn't have that box checked, then they will not be able to see invoices/proposals tabs on the contact details page in the web (same behavior now as the app has).
- **Reschedule Appointments** - in the Mobile app, the User can edit appointment schedule
- **Transfer Appointments** - in the Mobile app, the User can reassign appointments to other Users

Schedule/Inventory Permissions

- **Track Inventory?** - Enable inventory tracking for this user
- **CC Appointment Confirmations** - Allows this user to be CC'd on confirmation emails for their appointments
- **Can Self Edit Inventory** - Allows this user to edit their own part inventory (requires Inventory Management to be enabled)
- **Can Alter Start/Finish** - Allows this user to manually edit start and finish times of an appointment
- **Pull From Queue?** - Allows this user to pull appointments from the queue onto the calendar
- **Future Visibility** - The number of days a user can see ahead on their schedule
- **Hide Future on Details?** - Hides future appointments on the appointment details page
- **Login Restrictions** - Prevents the user from logging in to the mobile app outside of their normal work hours

Full List of User Permissions

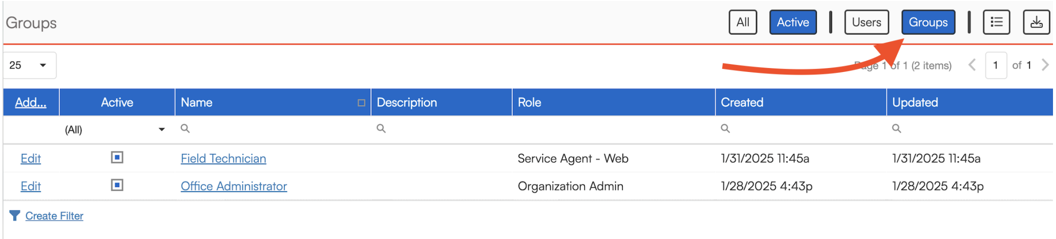
Permission	Allows the user to...
App	access to the service**minder** mobile app on phones and tablets
Appointments:Email	send appointment scheduled emails
Appointments:Finish:Add Parts	add parts to an appointment when finishing it
Appointments:Finish:Send Completion	send appointment completion notices to contacts

Permission	Allows the user to...
Appointments:Grid:All	view all appointments in the Appointments Grid
Appointments:Grid:Backlog	view backlog appointments in the Appointments Grid
Appointments:Grid:In Progress	view in progress appointments in the Appointments Grid
Appointments:Grid:Last	view contacts' most recent appointments in the Appointments Grid
Appointments:Grid:Reworks	view rework appointments in the Appointments Grid
Appointments:Grid:Upcoming	view upcoming appointments in the Appointments Grid
Appointments:Notes:Private	view appointment notes that are marked as private
Branding	access all Brand Administrator level permissions, including the Dashboard
Branding:EmailCampaigns:Create	create and launch email campaigns at the brand level in Dashboard
Branding:Report Subscription	subscribe to regular report downloads within the brand
Calendar	access the location’s Calendar and can see all appointments and time blocks
Call Center	access the call center and call logging information (this is for phone system integrations only)
CallCenter:Request Call Credit	request a credit for the call if integrated with a phone service and if a particular call is logged
CallCenter:Review Call Audio	listen to call center audio recordings
Campaigns	access Campaigns in the top navigation bar
Campaigns:Create	create a marketing Channels and Campaigns
Contacts	access the location's Contacts
Contacts:Create	create new contacts
Contacts:Delete	delete contacts
Contacts:Documents:View Private	create and view contact documents designated as private
Contacts:Edit	edit contact details
Contacts:Edit:Owned	edit details if the contact is owned (if you have contact “owned” feature on, which can be found in Control P General)
Contacts:Edit:Unowned	edit details if the contact is unowned (if you have contact “owned” feature on, which can be found in Contro General)
Contacts:Grid:All	access the Contacts grid
Contacts:Grid:Expired	access the Expired Snapshot grid
Contacts:Grid:Expiring	access the Expiring Snapshot grid
Contacts:Location:Update	update a contact’s location "pin" via the mobile app based on where they are in the field
Contacts:Merge	merge one contact into another
Contacts:Notes	create notes attached to contacts
Contacts:Notes:ViewPrivate	view notes on the contact details page that are marked as Private
Contacts:View	view contacts in the system without the ability to make edits
Contacts:View:Communication Details	view contact phone number and email address
ControlPanel:Parts:Create	create a new part
ControlPanel:Parts:Edit:General	edit general part details
ControlPanel:Parts:Edit:Inventory	edit inventory-related data for a part
ControlPanel:Parts:Edit:Pricing	edit pricing fields for a part
ControlPanel:Parts:Index	view the parts grid or parts details
ControlPanel:Services:Create	create a new service
ControlPanel:Services:Edit:General	edit general service details
ControlPanel:Services:Edit:Pricing	edit pricing fields for a service
ControlPanel:Services:Index	view services grid or service details
Dispatch	access the Dispatch tab in the toolbar
Dispatch:Appointments:Notes	make appointment notes via Dispatch
Drips	view, edit, and create new Drip triggers and Drip Campaigns in the left navigation column
Feedback	access the Issues grid (if the organization has the Feedback Management add-on feature)
Invoices	create and view invoices
Invoices:Approve	approve invoices in "Unapproved" status
Invoices:Delete	delete invoices
Invoices:Edit	edit invoices
Invoices:Exclude from End of Period	mark invoices as excluded from the end of period report
Invoices:Grid:All	access all invoices in the Invoices grid
Invoices:Grid:Open	access open invoices in the Invoices grid
Invoices:Grid:Paid	access paid invoices in the Invoices grid
Invoices:Grid:Unapproved	access unapproved invoices in the Invoices grid
Invoices:Void	void invoices
Invoices:WriteOff	write off balances on invoices
Issues:Edit	edit items on the issues grid (if the organization has the Feedback Management add-on feature)
Maps	access Maps in top navigation bar
MySchedule:Appointments	view the Appointments on your service agent's schedule
Organization	access the Control Panel button in the Administration section of the toolbar
Organization:Account	access the Organization’s account with ServiceMinder in Control Panel: Settings (requires Organization pe Control Panel access)

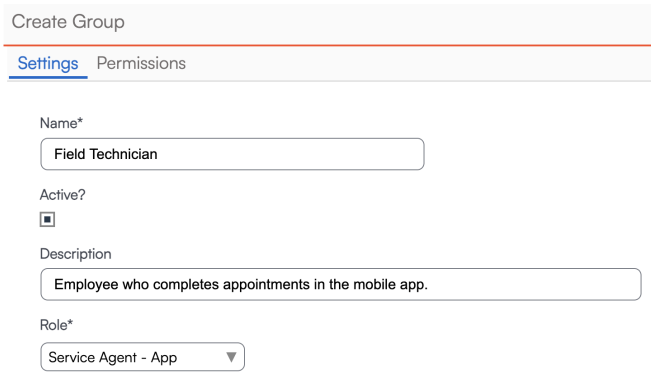
Permission	Allows the user to...
Organization:Custom Fields	view and create Custom Fields for the Organization in Control Panel (requires Organization permission for Panel access)
Organization:Email Campaigns	access Email Campaigns specific to that location in Control Panel and can create them via the Action dropd Contacts grid (requires Organization permission for Control Panel access)
Organization:Email Templates	create and edit custom Email Templates in Control Panel (requires Organization permission for Control Pa
Organization:Invoice Terms	view and update the items in the Terms section of the Invoices page in Control Panel
Organization:Marketing Tools	access marketing tools specific to that location
Organization:Owner	be designated as an Owner in the system (connected to Owner role) and recieves the End of Period report
Organization:Parts	manage Parts/Add-ons for that location (If checked alone, this will be all that is manageable in Control Pane
Organization:QBO Connection	manage that location's connection with QuickBooks Online
Organization:Service Agents	add/edit/delete Service Agents tied to that location in Control Panel (If the User has Control Panel access)
Organization:Settings	see the Control Panel page, giving access to any pages here that do not have their own separate permission
Organization:Users	add/edit/delete Users specific to that location in Control Panel (If the User has Control Panel access)
Organizations	perform some higher level actions for the organization (i.e., edit postal codes, delete drips, manage collater items, and view the credit card processor list)
Organizations:All Features	view and update the billing plan for the organization
Organizations:Roles	create and edit Service Roles in Control Panel
Pages	access the Pages button in the Administration section of the toolbar and make adjustments to the settings (requires the Pages add-on feature)
Pay:Account	Access all settings and pages related to ServiceMinder Pay
Pay:Reporting	Access reporting and documentation links related to ServiceMinder Pay
Payments:Delete	delete payments on invoices
Payments:Refund	refund payments on invoices
Portfolio	create and edit custom proposal templates (requires SMPortfolio add-on feature)
Proposals	create and view proposals
Proposals:Bulk Accept	bulk accept proposals using the Actions menu on the proposals grid
Proposals:Delete	delete proposals
Proposals:Edit Accepted	edit proposals after they have been accepted
Proposals:Email	send proposals via email
Proposals:Grid:Accepted	view accepted proposals on the Proposals grid
Proposals:Grid:All	view all proposals on the Proposals grid
Proposals:Grid:Open	view open proposals on the Proposals grid
Proposals:Grid:OpenProjects	view open projects on the Proposals grid
Proposals:Grid:Unscheduled	view unscheduled proposals on the Proposals grid
Proposals:Grid:Won	view won proposals on the Proposals grid
Proposals:Margins:View	see the displayed per-unit cost and margins on a proposal
Proposals:Mark Complete	mark proposals as complete
Proposals:Send	send proposals to contacts
Reports	
Routing	route queued appointments (requires the Fleet Routing add-on feature)
ServiceAgents:TimeOffs:Create	create time blocks on the calendar for service agents
Subcontractor:Review Bids	review bids (if you have contact “owned” feature on, which can be found in Control Panel > General)
Subcontractor:Bids	access the Bids Shortcut and create Bids on Proposals. (If you have contact “owned” feature on, which can b Control Panel > General)
TaskBoard:Content:Update	make changes to TaskBoards
Tasks	create/edit/delete tasks
Tasks:Complete	complete assigned tasks in My Schedule
Text Messaging	access the Texting tab and send text messages to contacts
User:Impersonation	impersonate other users for troubleshooting purposes
View:OwnedBy:Me	can see items in the system that are owned by that user
View:OwnedBy:Others	can see items in the system that are owned by other users
View:OwnedBy:Nobody	can see items in the system that are not owned by any user
Web	access service**minder** on the desktop web browser

Permission Groups

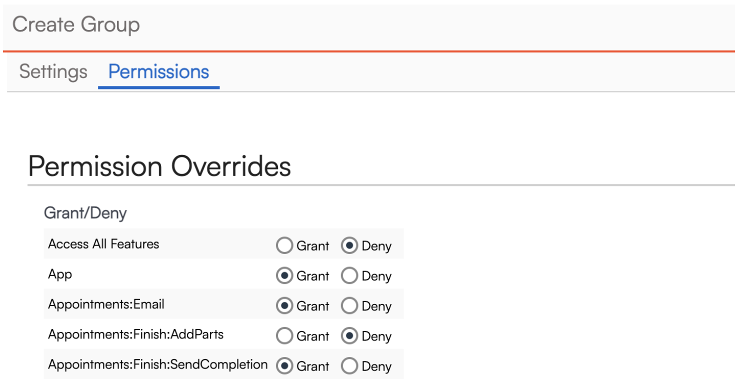
In **Control Panel > Users**, click **Groups** in the top right corner. This will take you to a page where you can create custom groups of Users in order to assign Permissions consistently to all users within that group.



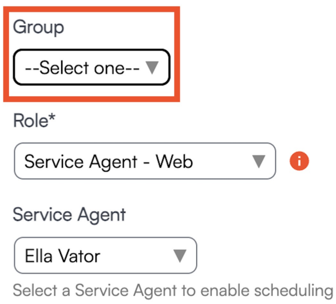
From there, you can click **Add** where you will be prompted to create a Name, Description, and User Role for anyone included in this group.



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.