# User Settings

08/16/2024 11:56 am CDT

## Overview

Everyone who needs to log in to servicе**minder** must be set up as a User. Users must have a name and an email address. Any user who will also be going on appointments will need a Service Agent created and connected to their User.

This article will review:

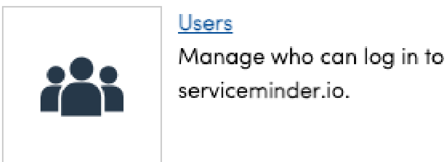


## Video Tutorial

Your browser does not support HTML5 video.

## Adding a New User

To add a new user, go to **Control Panel** > **Users** and click on **Add**.



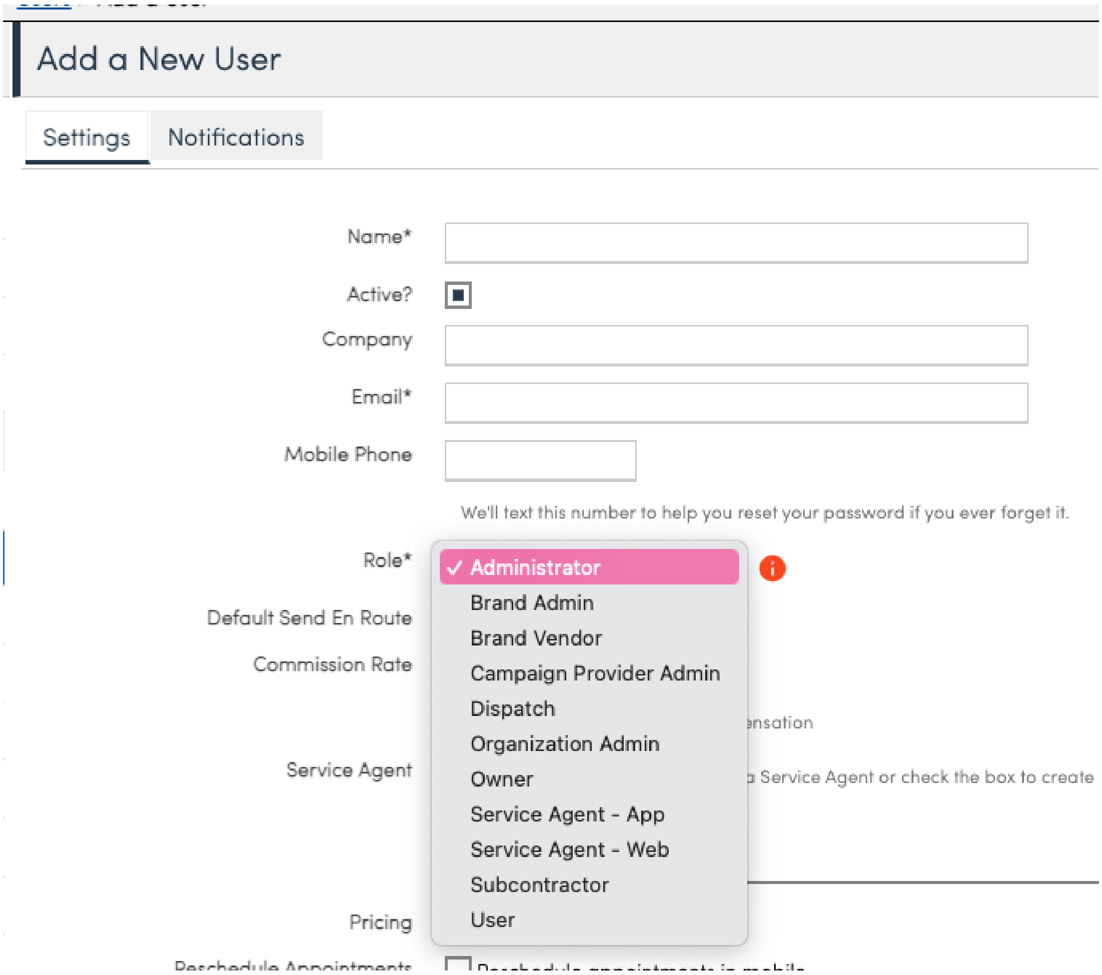

Here you will configure their permissions, notification preferences, and connect them to a Service Agent (if applicable).

Once you have saved a new user, they will receive an email with a link to set up their password for the first time. This link is valid for 24 hours. If the link has expired, they can click Forgot Password and follow the steps to set their password that way.

## User Settings

Enter in the user's name, email address and select the desired role. You can also add an optional mobile phone number. The mobile number can be used for password resets (in addition to emails).

Anything marked with an star (*) is required before you can**Save** and move on.




Once you add the user, we'll send out an email with a link in it to the email address you specified. The user just needs to click the link in that email to set their password.

Visit our **User Permissions Help Page** for more information about user permissions.

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## Understanding Roles

Roles define what level of access a given user will have. Depending on a user's role, they may have access to just appointments and scheduling or reports and your account settings.

- **Organization Admin and Owner:** Have access to all permissions at the organization level. Users with this role should be limited to those who need to be performing high-level tasks related to office administration, reports, campaigns, integrations, etc. The only difference between the two roles is the name - allowing internal users to identify who the owner is within the organization.

- **User:** Have access to all contacts, appointments and minimal reporting data.
- **Service Agent - Web:** Able to log into the web but only have access appointments assigned to them (via their linked service agent) and the related contact details.
- **Service Agent - App:** They are only able to log in to the app and the same access restrictions as the Service Agent - Web role.

Other less frequently used roles are "Dispatch" and "Subcontractor."

- **Dispatch:** This is used for call center users. It allows them access to the Dispatch tool for answering phone calls, creating new contacts, scheduling appointments and moving contacts from one organization to another. Note - only brand admins can give someone the role of Dispatch
- **Subcontractor:** They are able to access any appointments assigned to them as a subcontractor

# Enabling a User for Scheduling

To be able to schedule a user for appointments, they need to have a **Service Agent** created and connected. You can set up the service agent and related availability by going to **Control Panel > Service Agents**. Then pick that service agent from the list when adding or updating the user.

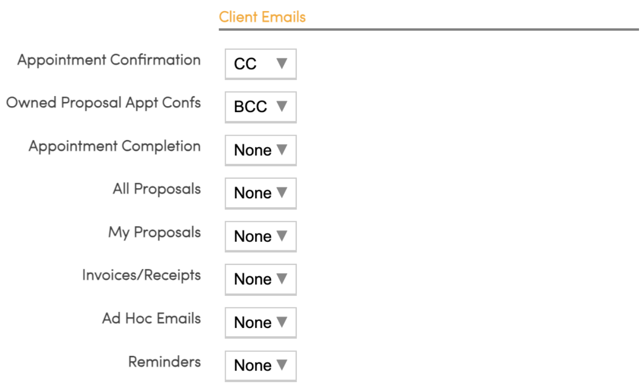
To put it another way:

- User is created to allow someone to log in to service**minder**. A User by itself cannot be scheduled - they can only log in.
- A Service Agent is created to enable scheduling. A Service Agent by itself cannot log in - only be scheduled.
- For employees who need to do both, you will need to create both and then connect them.

To learn more about visit, **Service Agents and Subcontractors**. On that Help page, we have more information about the differences and how to create Service Agents.

# Client Emails

For many of these notifications, users can be CC'd on them automatically. To determine who gets CC'd on what, be sure to edit your users and enable CC notifications for proposals, invoices, receipts, etc.



Client-facing emails can be customized by going to **Control Panel > Automated Emails**.

# Microsoft 365

This section is for connecting the User's external Microsoft calendar so that their service**minder** appointments show on their personal calendar.

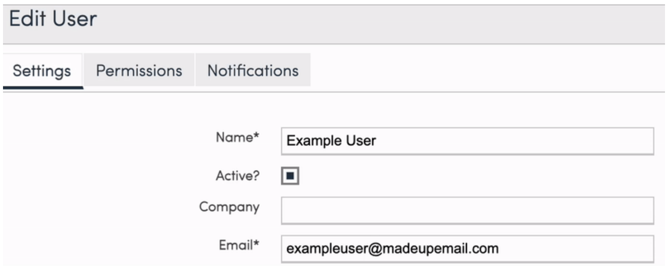
Two Way Settings:

- If you check the **Add Time Blocks**, this will allow them to create time blocks on their personal calendar that syncs to their service**minder** calendar.
- If you select the **Update Appointments** box, this will allow them to edit some appointment info from their personal calendar.

# Removing a User (Making them Inactive)

Users cannot be deleted once they have activity. If you have an employee who no longer works at your office, you must make that user Inactive, so they no longer log in and access your account. If they also have a service agent attached to their user, you will also need to make the service agent inactive.

You will need to uncheck the box marked **Active**. That will prevent the User from being able to log in.




You will need to go to **Control Panel > Service Agent > Edit**, and also uncheck the **Active** box for their **Service Agent** (if one exists).

If you are a franchise owner and you have users that you want to be able to have access to more than one organization in service**minder**, please send the request to your Brand Admin. They can add/remove existing users to and from organizations.

# FAQs

### If a User has access to multiple organizations, can they be a Owner in one location and an Org Admin in another?

No, they only have one role attached to their User - even if they are in multiple organizations. They can only be an

Owner or only be an Org Admin.

### If I am an Owner in one location but I purchase another location from an existing franchisee, do I have to keep those accounts and Users separate?

You will want to keep those accounts separate, but you can keep your User and add it to the new organization. You will need a Brand Admin's assistance to do that (or submit a Support ticket to our team).

### Can I have one Service Agent work in multiple organizations?

Yes, however, the org that they are created in will be considered their home location. If that organization ever closes or they no longer function in that org, you need to move their original User.