# User Settings

09/29/2025 10:08 am CDT

## Overview

Everyone who needs to log in to serviceminder 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:



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## Video Tutorial

Your browser does not support HTML5 video.

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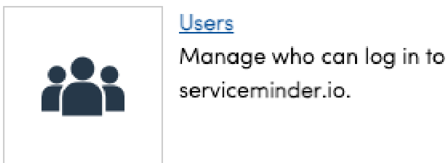
## Adding a New User

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.

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 serviceminder, please send the request to your Brand Admin. They can add/remove existing users to and from organizations.

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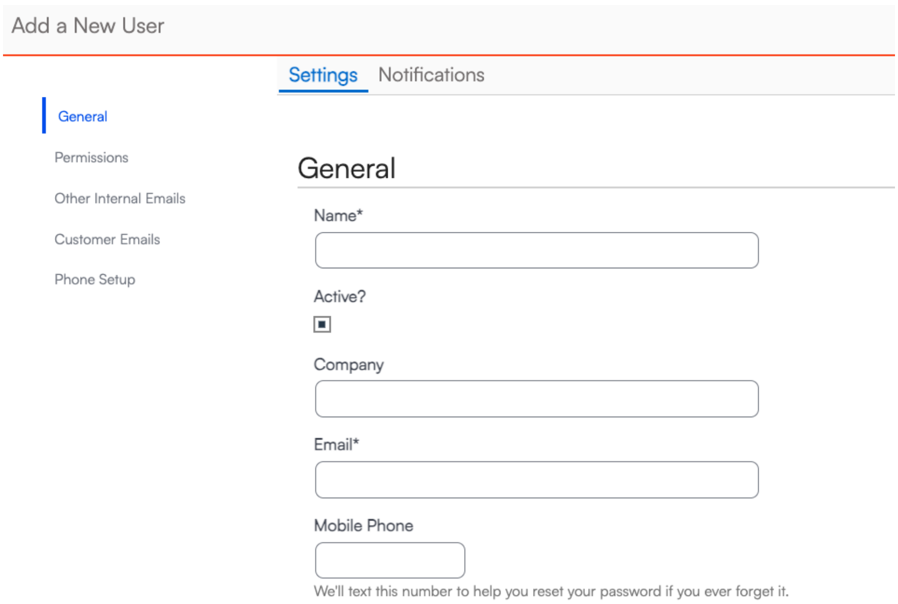
# User Settings

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 as a secondary password reset method.

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 needs to click the link in that email to set their password within 24 hours. If they miss that window, they can navigate to the service**minder** login page and click "Forgot Password" to send another email to themselves.

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. Below is a list of Standard Roles within service**minder**, but roles can be customized by brand so this may not reflect the exact roles available to you.

## Standard Roles

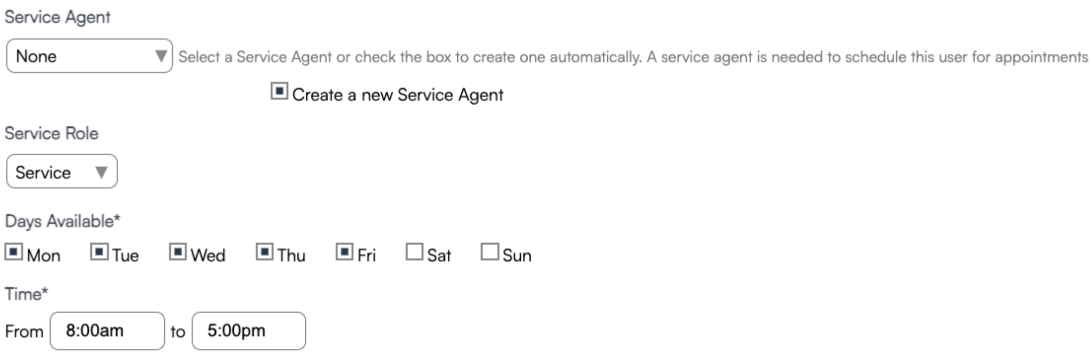
| Role | Description |
|---|---|
| **Brand Administrator** | Have access to all brand-wide settings in the Dashboard and can impersonate other users to provide assistance in their organization. |

| Role | Description |
|---|---|
| **Organization Admin and Owner** | Have access to all permissions at the organization level. These roles should be reserved for users who handle high-level tasks like administration, reports, campaigns, and integrations. The only difference between them is the title, which helps internal users identify the organization's owner. |
| **User** | Has access to all contacts and appointments, with limited access to reporting data. |
| **Service Agent – Web** | Can log into the web app and view only the appointments assigned to them (based on their linked service agent profile) and related contact details. |
| **Service Agent – App** | Can log in to the mobile app only, with the same access restrictions as the Web role—appointments assigned to them and related contact info. |
| **Dispatch** | Used for call center staff. Grants access to the Dispatch tool to handle phone calls, create contacts, schedule appointments, and move contacts between organizations. Only Brand Admins can assign this role. |
| **Subcontractor** | Can access any appointments specifically assigned to them as a subcontractor. |
| **Brand Vendor** | Has access to dashboard level reports and can impersonate other users, without having all of the settings controls that brand administrators have. Meant for third parties that are supporting your brand. |

# Enabling a User for Scheduling

To schedule someone for appointments, they must have a **Service Agent** profile linked to their **User** account.

When adding a new user, you have the option to create the new Service Agent and set their basic schedule. Just check the box "Create a new Service Agent."




You can also create and manage service agents by going to: **Control Panel > Service Agents.** Once the service agent is set up with availability, you can link them by editing the appropriate user and selecting the service agent from the dropdown menu.

## Key Distinction:

- **User** – Allows someone to log in to ServiceMinder. Users **cannot be scheduled** unless linked to a service agent.

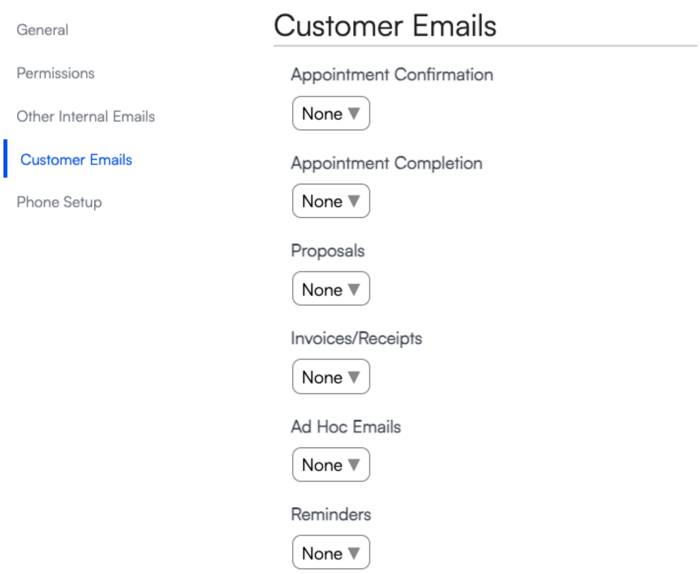
- **Service Agent** – Enables someone to be scheduled for appointments. Service agents **cannot log in** on their own.

If an employee needs to both **log in** and **be scheduled**, you'll need to create both a user and a service agent, then connect them.

Visit [Service Agents and Subcontractors] to learn more.

## Customer Emails

Use the dropdown menus to determine if you want this user to be CC'd or BCC'd on each type of email sent to customers.




The content of customer emails can be customized by navigating 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.

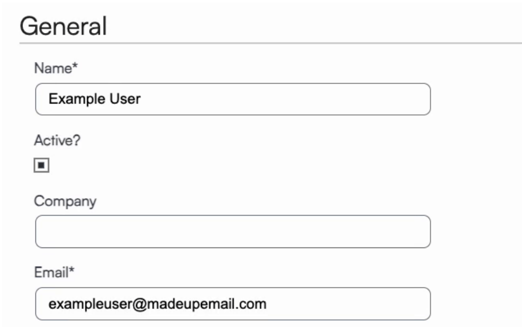
Two Way Settings:

- 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 Appointment**s 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.




If this user is attached to a service agent, you will need to go to **Control Panel > Service Agent > Edit**, and also uncheck the **Active** box for their **Service Agent.** This will prevent them from being scheduled for future appointments.

# FAQs

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

Yes. On the User details page, navigate to the Organizations Memberships tab and click Edit next to the organization that you want to change their role in. Here, you can assign a custom Group and Role to customize the user's permissions in each organization.

### 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 organizations separate, but you can keep your one user and add it to the both organizations. You will need a Brand Admin's assistance to do that (or submit a support ticket to our Client Success 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" organization. Most service agent configuration settings will only be available in their home organization. If that organization ever closes or they no longer function in that org, you will need to move their original User. Submit a request to your Brand Administrator or the Client Success team to accomplish this.