Managing Users and Service Agents in Organizations

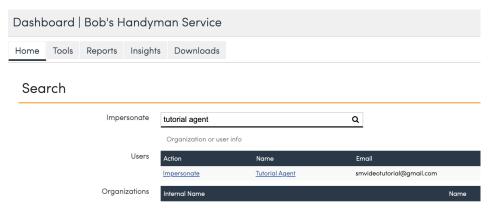02/06/2025 1:10 pm CST

Overview

This article is for Brand Administrators. Actions explained in this article require access to the Dashboard.

> This article will review:
> - Settings and Navigation
> - Managing Users
> - Managing Service Agents
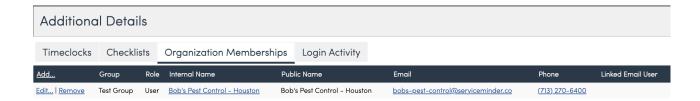> - FAQs

Settings and Navigation

To manage a user's organization memberships, you can search for their name or email address in **Control Panel > Dashboard**.

You can also find them within their current organization(s) by navigating to **Control Panel > Users** and finding them within that list.
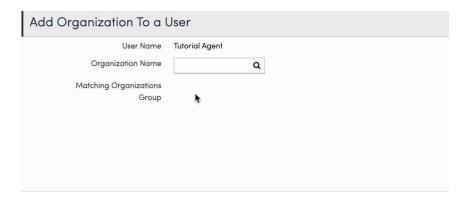
Managing Users

Once you have found a user within service**minder**, click on the **Organization Details** tab on the right side of the page.

Add

Click Add and search for the organization you'd like this user to have access to.
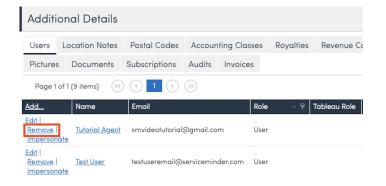

Select the organization you want to add this user to. If Permission Groups have been set up in this organization, you can also choose which group this user will belong to. This will automatically adjust their permissions in that specific organization. Users can have different permissions in different organizations, depending on their assigned group in each.

> Dispatch must be Users within the Franchise Org Accounts. That will provide them access to all accounts needed to fulfill the duties of scheduling for all locations.

Remove

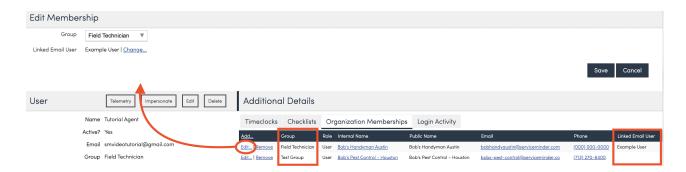Click this button to remove this user from the selected organization.

If a user no longer works for any organization within the brand, make them **Inactive** instead of removing them from all organizations. Making them inactive immediately takes away their login access to **all** organizations they are a part of.

Edit

Clicking Edit will open up the options to change two factors of a user's membership within that organization.

1. **Group** - Change their group within that organization. This will impact their Role and Permissions within that organization, but will not impact any other organization memberships that user has.

2. **Linked Email User** - This feature allows a user to use one email address to log in, but communicate with contacts using a unique email address for each organization. A great use for this is if your brand has more than one franchise brand within it (i.e., lawn care and holiday lighting).

Managing Service Agents

From the user details page, you can click on the name of their service agent to navigate to their service agent details page. Click **Edit** and scroll down to the **Availability** section of the page. Here you will find the option to set which organizations this service agent is also available in.

Whichever organization the service agent was created in will be its **home organization** by default. The home organization will have more control over the agent's settings. All secondary organizations will only be able to update the agent's skills, hourly rate, efficiency, commission rate, capacity, and schedule.

ℹ️ To change a service agent's home organization, submit a support ticket with the service agent name, current home organization, and desired home organization.

FAQs

Q: An organization needs to add a user from outside of our brand (i.e., an accounting firm). How do

we do that?

A: Submit a ticket to the service**minder** team including the email address of the user and the organization(s) they need to be added to. We will take care of it for you!