

Managing Users and Service Agents in Organizations

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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**.

The screenshot shows a dashboard for 'Bob's Handyman Service'. At the top, there is a breadcrumb 'Dashboard | Bob's Handyman Service'. Below it is a navigation bar with tabs: 'Home', 'Tools', 'Reports', 'Insights', and 'Downloads'. The 'Home' tab is active. Below the navigation bar is a search section titled 'Search'. There is a search input field with the text 'tutorial agent' and a search icon. Below the search field, there are three sections: 'Impersonate', 'Users', and 'Organizations'. The 'Impersonate' section shows a search result for 'tutorial agent' with a search icon. The 'Users' section shows a table with columns 'Action', 'Name', and 'Email'. The 'Organizations' section shows a table with columns 'Internal Name' and 'Name'.

Organization or user info
tutorial agent

Users	Action	Name	Email
	Impersonate	Tutorial Agent	smvideotutorial@gmail.com

Organizations	Internal Name	Name
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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 serviceminder, click on the **Organization Details** tab on the right side of the page.

Additional Details

Timeclocks | Checklists | **Organization Memberships** | Login Activity

Add...	Group	Role	Internal Name	Public Name	Email	Phone	Linked Email User
Edit... Remove	Test Group	User	Bob's Pest Control - Houston	Bob's Pest Control - Houston	bobs-pest-control@serviceminder.co	(713) 270-6400	

Add

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

Add Organization To a User

User Name: Tutorial Agent

Organization Name:

Matching Organizations

Group

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.

Additional Details

Users | Location Notes | Postal Codes | Accounting Classes | Royalties | Revenue Cr

Pictures | Documents | Subscriptions | Audits | Invoices

Page 1 of 1 (9 items)

Add...	Name	Email	Role	Tableau Role
Edit Remove Impersonate	Tutorial Agent	smvideotutorial@gmail.com	User	
Edit Remove Impersonate	Test User	testuseremail@serviceminder.com	User	

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.



Note: If a user is removed from **all** organizations within your brand and you navigate away from their user details page, you will not be able to search for them in the dashboard anymore. You will need to contact **serviceminder** support to have them added back to an organization in your brand.

Edit

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

Edit Membership

Group: Field Technician

Linked Email User: Example User | [Change...](#)

Save Cancel

User

Telemetry Impersonate Edit Delete Additional Details

Name: Tutorial Agent

Active? Yes

Email: smvideotutorial@gmail.com

Group: Field Technician

Timeclocks Checklists Organization Memberships Login Activity

Add...	Group	Role	Internal Name	Public Name	Email	Phone	Linked Email User
Edit... Remove	Field Technician	User	Bob's Handyman Austin	Bob's Handyman Austin	bobhandyaustin@serviceminder.com	(000) 000-0000	Example User
Edit... Remove	Test Group	User	Bob's Pest Control - Houston	Bob's Pest Control - Houston	bobs-pest-control@serviceminder.co	(713) 270-6400	

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.

- Also Available In
- serviceminder | serviceminder.com
 - Bob's Handyman - Plano
 - Bob's Maids - Plano
 - Not-A-Business LLC
 - Adventuring Parties

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.



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 serviceminder 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!
