Managing Users and Service Agents in Organizations

05/30/2025 3:17 pm CDT

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
- Permission Groups
- Custom User Roles
- FAQs

Settings and Navigation

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

Dashboard Bob's Handyman Service									
Home	Tools	Reports	Insights	Downloads					
Search									
		Impe	rsonate	tutorial agent		Q			
				Organization or use	er info				
Users			Users	Action	Name	Email			
				Impersonate	Tutorial Agent	smvideotutoria	l@gmail.com		
		Organ	izations	Internal Name			Name		

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.

Additional Details								
Timeclocks	Checkli	sts	Organization Membershi	ips	Login Activity			
<u>Add</u>	Group	Role	Internal Name	Publi	ic Name	Email	Phone	Linked Email User
Edit <u>Remove</u>	Test Group	User	Bob's Pest Control - Houston	Bob's	s Pest Control - Houston	<u>bobs-pest-control@serviceminder.co</u>	<u>(713) 270-6400</u>	

Add

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

Add Organization To a l	User	
User Name Organization Name Matching Organizations Group	Tutorial Agent	

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.

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 service minder 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 V								
Linked Email User	Example User <u>Change</u>								
	•							Save	Cancel
User	Telemetry Impersonate Edit Delete	Addition	al Details						
	Name Tutorial Agent	Timeclocks	Checklists	Or	ganization Memberships	Login Activity			
	Active? Yes	Add	Group	Role	Internal Name	Public Name	Email	Phone	Linked Email User
	Email smvideotutorial@gmail.com	EditRemove	Field Technician	User	Bob's Handyman Austin	Bob's Handyman Austin	bobhandyaustin@serviceminder.com	(<u>000) 000-0000</u>	Example User
	Group Field Technician	Edit Remove	Test Group	User	Bob's Pest Control - Houston	Bob's Pest Control - Houston	bobs-pest-control@serviceminder.co	(<u>713) 270-6400</u>	

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.

Permission Groups

Permission Groups are an easy way to apply consistent user permissions within an organization. Managed at the organization level, these groups can be customized by users with Control Panel access. When adding a new user, simply assign them to the appropriate group to ensure they have all the necessary permissions for their role.

If a user belongs to multiple organizations, they can be assigned to different groups in each one. This allows for flexible access-enabling features in one organization while restricting them in another, based on the user's specific responsibilities.

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.

Groups	5					All Active Users	Groups 📃 🛓
25 👻						Page 1	1 (2 items) < 1 of 1 >
Add	Activ	e	Name 🔺	Description	Role	Created	Updated
	(AII)	•	Q	Q		Q	Q
Edit			Sales	<u>This is for sales agents</u>	Service Agent - Web	1/24/2025 1:25p	1/24/2025 1:25p
Edit			Technician	<u>Use for your technicians</u>	Service Agent - Web	1/21/2025 2:51p	1/21/2025 2:51p
T Create	Filter						

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.

Create Group						
Settings	Permissions					
	Name* Active? Description Role*	Office Administrators Office Administrators Organization Admin				
Then you'	I click the Permissions	ab and grant or denve ach permission				

Then, you'll click the Permissions tab and grant or deny each permission.

Settings	Permissions			
		Permission Overrides		
	Grant/Der	IV Access All Features	• Grant	ODeny
		Арр	• Grant	ODeny
		Appointments:Email	• Grant	ODeny
		Appointments:Finish:AddParts	• Grant	ODeny
		Appointments:Finish:SendCompletion	• Grant	ODeny
		Appointments:Grid:All	• Grant	ODeny
		Appointments:Grid:Backlog	• Grant	ODeny
		Appointments:Grid-InProgress	C rant	

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.



Custom User Roles

ServiceMinder empowers each brand to manage its own set of user roles, providing granular control over access and permissions. Whether you're onboarding a new team member or adjusting responsibilities as your business evolves, customized roles allow you to tailor user access to fit your operational needs. By managing roles at the brand level, you ensure clarity, consistency, and security across your organization.

With customizable roles, Brand Administrators can:

- Create new roles specific to their operational structure.
- Rename existing roles to match internal terminology.
- Assign and adjust permissions with ease.
- Ensure each user has access only to the tools and data relevant to their role.

Changes to roles take effect immediately and cascade to all users assigned to that role, simplifying administration and reducing manual updates.

To customize user roles for your brand:

- Navigate to Dashboard > Tools
- In the Settings section, locate and click on Roles to view your brand's role list.

Settings | Bob's Handyman Service



- Create or Edit Roles
 - Click Add Role to create a new one from scratch.
 - Click Edit next to an existing role to modify its name or permissions.

Roles						
Page 1 of 1 (10 items)						
<u>Add</u>	Name					
Edit	Brand Admin					
Edit	Brand Vendor					
<u>Edit</u>	Campaign Provider Admin					
<u>Edit</u>	Dispatch					
<u>Edit</u>	Organization Admin					
<u>Edit</u>	Owner					
<u>Edit</u>	Service Agent - App					
<u>Edit</u>	Service Agent - Web					
Edit	Subcontractor					
Edit	User					

- Assign Permissions: Each role has a list of permission checkboxes. Simply check or uncheck each box to grant or remove access to a specific feature.
- Save Changes: Click Save to apply updates. All users assigned to the modified role will automatically inherit the new permissions.

FAQs

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

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!

What's the difference between Permission Groups and Custom User Roles?

Permission Groups are managed at the **organization level** and help apply consistent permissions within a single franchise location. They're great for quickly assigning the right access when adding new users. A user can belong to different groups in different organizations.

Custom User Roles are managed at the **brand level** and define standardized roles across all organizations in your brand. Changes to a role automatically update permissions for all users assigned to it.

How do I make sure a user loses access immediately if they leave the brand?

Set the user to **Inactive** in any organization. This removes their access to all organizations at once, without needing to remove them individually. It's the most efficient way to revoke access brand-wide.

How do I change a Service Agent's home organization?

You'll need to submit a support ticket. Include the agent's name, their current home organization, and the organization you'd like to move them to.