Service Autopilot™

USER ROLES & RIGHTS

USER GUIDE

V3.3

Contents

What Are User Roles and Rights?

All Service Autopilot users must have permissions to access different functions and areas of the system. These permissions, or rights, are associated with a *role*. See “Set Up Roles in Service AutopilotSet Up Roles in Service Autopilot” for instructions.

About this Guide

The sections in this guide match the tabs under **Settings > User Roles & Rights.**

Home User Rights	Includes Settings, the Report Center, and the Marketplace.
CRM User Rights	Includes Clients and Leads, CRM Reports, Tickets, Automations, Forms, and Email Activity.
Scheduling User Rights	Includes Scheduling, Jobs, Employees, Vendors, and Chemical Tracking.
Accounting User Rights	Includes Accounting functions and reports, Statistics, and Payroll.
Mobile User Rights	Includes Legacy and Team app functions, and access to Assets and Forms on the Legacy app.

Steps to Set Up User Rights

1. Click the **Settings** icon.

2. In the first section under "Company," click **User Roles and Rights**.
3. Select the name of a role in the list.
4. Click a tab: "Home," "CRM," "Scheduling," "Accounting," or "Mobile."
5. Check all the boxes for the rights you want to assign.
6. Click **Save**.

"Start where you are. Use what you have. Do what you can."
--Arthur Ashe

Set Up Roles in Service Autopilot

Service Autopilot provides standard user roles with the system, and each SA user must have a role assigned to give them access to the features they need to use. You also can create additional roles and assign rights to them, as needed. The following sections show you how to set up User Roles for yourself and your employees.

Create New Employees

To add a new employee, follow these steps:

1. Go to **Team > Employees** and click **Add Employee**.
2. On the "Personal Information" tab, fill in the name, email, and resource code. Optionally, fill in the rest of the information fields.
3. On the "User Settings" tab, select an option from the **User Type** and **User Role** dropdown lists, and enter a password in the **Password** field.
4. Optionally, fill in the rest of the information fields.
5. Click **Save**.

Assign Roles to Employees

For each employee, follow these steps:

1. Go to **Team > Employees** and click an employee in the list.
2. Click the **Edit** link to see the **Edit Employee** screen.

3. On the "User Settings" tab, select an option from the **User Role** dropdown list.
4. Click **Save**.

Create a New Role

To create a new user role, follow these steps:

1. Click the **Settings** icon.
2. In the first section under "Company," click **User Roles and Rights**. The standard roles that SA provides are listed for you to choose from.
3. If needed, click the **Add Role** button to add a new role.
4. On the **Add Role** screen, fill in the name and description of the role, then check any rights settings you need on the five tabs.
5. Click **Save**.

Assign Rights to SA Users

To assign or change rights assigned with any user role, follow these steps:

1. Go to **Settings > User Roles & Rights**
2. Click a Role name.
3. Click one of the tabs: "Home," "CRM," "Scheduling," "Accounting," or "Mobile."
4. Check or uncheck the boxes for individual rights or select the checkbox at the top of a column to select all rights in the column.

   Definitions for each user right are detailed in this guide.
5. Click **Save**.

Change the Active Status of a User Role

You can change a status of existing user roles and rights to be active or inactive. To do so, follow these steps:

1. Go to **Settings > User Roles & Rights**
2. Check or uncheck the box on the left of a role name

3. Hover over the **Actions** button and click either:
    - **Make Active**
    - **Make Inactive**
4. Click **Save**.

Delete a User Role

You can delete any user role, whether it is inactive or not. To do so, follow these steps:

1. Go to: **Settings > User Roles & Rights**
2. Check or uncheck the box for a role name.
3. Hover over the **Actions** button and click **Delete**.
4. At the confirmation message, click **OK** to confirm the action. Otherwise, click **Cancel**.
5. Click **Save**.

Home User Rights

Set general rights for Service Autopilot users at **Settings > User Roles and Rights > (Role name)** > "Home" tab.

User Rights for Settings Access

On the "Home" tab, in the **Settings Access** column, select any of the checkboxes defined below.

User Role/Right	Definition
Account Settings	Allows access and rights to edit any settings under "My Account"
Company Settings	Allows access and rights to edit any settings under Company Settings
Home Settings	Allows access and rights to edit any settings under Home Settings
CRM Settings	Allows access and rights to edit any settings under CRM Settings
Scheduling Settings	Allows access and rights to edit any settings under Scheduling Settings
Accounting Settings	Allows access and rights to edit any settings under Accounting Settings

Note: Items under each Settings section will be made available *if* the setting is enabled.

User Rights for Report Access

To set rights to access the Report Center, go to **Settings > User Roles and Rights > (Role name)**:

1. On the "Home" tab, in the **Report Access** column, select any of the check boxes below.
2. You can grant access to the Report Center by selecting the check boxes for:
   - SA Dashboard
   - View Report Center
   - Manage Report Center

The other rights in this column are options for building a new Report Center dashboard.

User Role/Right	Definition
SA Dashboard	Allows access to SA's preset dashboards and components.
Company Reports	When building a new dashboard, having this check box selected lets the user see company-wide report components in the Visual Gallery.
CRM Reports	When building a new dashboard, having this check box selected lets the user see CRM-related components in the Visual Gallery.
Scheduling Reports	When building a new dashboard, having this check box selected lets the user see scheduling-related components in the Visual Gallery.
Accounting Reports	When building a new dashboard, having this check box selected lets the user see accounting-related components in the Visual Gallery.
Sales Manager Reports	When building a new dashboard, having this check box selected lets the user see sales manager report components in the Visual Gallery.
Sales Rep Reports	When building a new dashboard, having this check box selected lets the user see sales rep report components in the Visual Gallery.
View Report Center	Allows access to the Report Center and shared reports
Manage Report Center	Allows the user to create and manage custom reports (Pro and Pro Plus only)

User Rights for Other Access

The "Other Access" column contains permissions for various areas of SA including Settings, Marketing, Websites, QuickBooks, Products, Alerts, Imports, and Wiki Pages.

1. Go to **Settings > User Roles and Rights > (Role name)**
2. In the "Other Access" column, select any of the checkboxes below

User Role/Right	Definition
Allow Roles Access	Allows access and rights to edit User Roles and Rights.
Websites	Allows access to and rights to edit websites integrated with SA (this right is obsolete, except for grandfathered members).

Export Lists	Allows you to export lists from Service Autopilot.
Delete Export	Allows you to delete exports on the My Day page.
QuickBooks Resync	Allows the user to resync selected clients' history with QuickBooks, going back to the "sync to" date. This is typically one year prior to their start date with SA.
Delete Webpages	Allows the user to delete any web pages integrated with SA (obsolete, except for grandfathered members).
Bulk Edit Products	Allows you to bulk edit products.
Estimate Accepted Alert	Enables an alert when an estimate is accepted through the estimate portal.
Imports	Allows you to import data.
Delete Wiki Pages	Allows you to delete wiki pages.
Restore Deleted Wiki Pages	Allows you to restore wiki pages.

User Rights for Accounting Functions

To set up rights for changing accounting settings, the role must have a combination of rights enabled.

1. Go to **Settings > User Roles and Rights > (Role name)**
2. In the "Settings Access" column, check the **Account Settings** check box
3. In the "Home Access" column, check any right. This allows the role to make changes to **Scheduling > Manage Employees** and to **Accounting > View Timesheets**

User Right for Accessing the Marketplace

To allow access to the SA Marketplace, follow these steps.

1. Go to **Settings > User Roles & Rights > [Role Name]**
2. On the "Home" tab, select the checkbox in the "Marketplace Access" column

User Role/Right	Definition
View Marketplace	Allows the user to view and download materials from the Marketplace

User Rights for Franchise Access (Pro Plus Only)

To set up rights for Franchise access, the role must have a combination of rights enabled.

1. Go to **Settings > User Roles and Rights > (Role name)**
2. On the "Home" tab, select the checkboxes in the "Franchise Access" column

User Role/Right	Definition
View Franchise List	Allows the user to view the Franchise list page
Franchise Login	Allows the user to log into a Franchisee
Manage Franchisee Connection	Allows the user to manage connected Franchisees
View Franchise Market	Allows the user to view the Franchise Marketplace
Marketplace Publishing	Allows the user to publish to the Franchise Marketplace

CRM User Rights

User rights for Customer Relationship Management (CRM) are set under **Settings > User Roles & Rights > [Role Name] > CRM**.

User Rights for Client Access

To set up user rights for access to clients, follow these steps.

1. Go to **Settings > User Roles & Rights > [Role Name] > CRM**
2. Select check boxes in the "Client Access" columns
3. For a role to access the **Client Edit** screen, check these rights:
    - Client List
    - Add Client
    - Allow Edit

User Role/Right	Definition
Client List	Allows the user to view, edit, and search the client list. This right also is required to access the **Client Edit** screen.
Activate/Deactivate	Allows the user to activate and deactivate clients.
Add Client	Allows the user to add a new client. This right also is required to access the **Client Edit** screen.
Allow Edit	Allows the user to edit existing clients on the **Client Edit** screen.
Allow Delete	Allows the user to delete existing clients.
Bulk Edit	Allows the user to bulk edit certain fields for clients from the client list.
Bulk Schedule	Allows the user to bulk schedule jobs.
Bulk Create	Allows the user to bulk create calls, Tickets, tags, and notes for clients from the client list.
Marketing	Allows the user to see the "Marketing" option on the Client List screen, under the **Actions** menu
Add Contract	Allows the user to create contracts for clients.

Payment Alerts	Allows the user to receive an alert when a payment is added in Service Autopilot.
Client Portal Ticket Alerts	Allows the user to receive an alert when a client portal Ticket is submitted.
View Balance	Allows the user to view the current account balance for clients.
View History	Allows the user to view all job history.
View Notes	Allows the user to view notes for clients and leads.
View Contracts	Allows the user to view contracts.
View Billing	Allows the user to view billing information for clients.
View Credit Card #'s	Allows the user to view credit card information for clients.
Copy Master Property Credit Card	Allows the user to copy master property credit card information to sub-properties.
Reset Client Portal Password	Allows the user to reset the password for the Client Portal

User Rights for Lead Access

To set up user rights for access to leads, follow these steps.

1. Go to **Settings > User Roles & Rights > [Role Name] > CRM**
2. Select the checkboxes in the "Lead Access" column

User Role/Right	Definition
Lead List	Allows access to view the lead list.
Allow Edit	Allows the user to edit leads.
Allow Delete	Allows the user to delete leads.
Bulk Edit	Allows the user to Bulk edit certain fields for leads from the lead list.
Bulk Create	Allows the user to bulk create calls, Tickets, tags, and notes for leads from the lead list.

Estimates	Allows the user to create estimates for leads.
Add Lead	Allows the user to create a lead.
Convert/Close	Allows the user to convert and close leads.

User Rights for CRM Reports

To set up user rights to run CRM reports, follow these steps.

1. Go to **Settings > User Roles & Rights > [Role Name] > CRM**
2. Select the checkboxes in the "CRM Reports" columns

User Role/Right	Definition
Client Balance	Allows the user to run the report that shows what customers owe you and how much.
Client Contracts	Allows the user to run the report that shows a single line summary of all contracts including billing days and agreed-upon amount.
Client Referral	Allows the user to run the report that shows clients added by customer referrals in the client source.
New Clients Report	Allows the user to run the report that shows new clients created in Service Autopilot. This report can be filtered by date range, status, and sales rep.
New Client Count Report	Allows the user to run the report that shows how many clients were created in Service Autopilot. This report can be filtered by date range. The report is divided by zip code, source, and sales rep.
Cancellation Count Report	Allows the user to run the report that shows the number of client cancellations in Service Autopilot. This report can be filtered by date range and is divided by source, sales rep, CSR, and zip code.
Clients Report by Completed Jobs	Allows the user to run the report that shows which clients had jobs completed. This report can be filtered by date range and/or clients that email.

Client Method of Payment	Allows the user to run the report that shows by what method a client typically pays by. This report can be filtered by client type and method of payment.
Terminations Report	Allows the user to run the report that shows new terminations by date range. This report can be filtered by date range, reasons, and sales rep.
Client Contact List	Allows the user to run the report that shows a client contact list. This report can be filtered by account balance and sales rep.
Client Phone List	Allows the user to run the report that creates a client phone list. This report can be filtered by client since date and by sales rep.
Client Timeline Report	Allows the user to run the report that shows timeline entries (emails, Tickets, calls, etc.) for a given time frame. This report can be filtered by date range, client, type, and resource.
Client Source Campaigns	Allows the user to run the report that shows the results of a marketing campaign. This report can be filtered by date range, source, and recovery days.
Lead Timeline Report	Allows the user to run the report that shows all lead timeline entries within a date range you select.
QuickBooks Comparison	Allows the user to run the report that shows any discrepancies between QuickBooks and Service Autopilot. Having the QuickBooks Sync is necessary.
Sales Summary by Source	Allows the user to run the report that shows the conversion percentage from a lead to a client by marketing source. This report can be filtered by date range.
Closed Leads Summary	Allows the user to run the report that shows how many leads were closed. This report can be filtered by date range.
Lead Aging Summary	Allows the user to run the report that shows how many leads have not been converted from 0-120+ days. This report can be filtered by date range.
New Leads Report	Allows the user to run the report that shows when leads were created in Service Autopilot. This report can be filtered by date range or sales rep.
Estimates by Stage	Allows the user to run the report that shows a list of estimates and their current stages. This report can be filtered by date range, sales rep, estimate stage, estimate reason, and custom fields.

Won Estimates by Service	Allows the user to run the report that shows a list of estimates won and divided by service type. This report can be filtered by date range, service, and sales rep.
Won Estimates Service Products	Allows the user to run the report that shows a list of estimates won and attached products. This report can be filtered by date range, service, product, and sales rep.
Won Estimates Service Value	Allows the user to run the report that shows a list of estimates won and how much was collected for services completed versus the original estimated value. This report can be filtered by date range, service, job status, and sales rep.
Bounced Emails	Allows the user to run the report that shows emails from Service Autopilot that have not been delivered.
Spam Emails	Allows the user to run the report showing emails from Service Autopilot that have been marked as spam.
Forms Summary	Allows the user to run the report that shows a list of forms and the number of responses given. This report can be filtered by form status and date range.
Company Scorecard	Allows the user to see the company scorecard.

User Rights for Tickets Access

To set up user rights for viewing or editing Tickets, follow these steps.

1. Go to **Settings > User Roles & Rights > [Role Name] > CRM**
2. Select checkboxes in the "Tickets Access" column

User Role/Right	Definition
View/Modify Tickets	Allows the user to view and edit Tickets.
Add Notes	Allows the user to add notes to Tickets.
Add Calls	Allows the user to create Calls.
View/Modify Email Integrations	Allows the user to view and edit Email Integrations.

User Rights for Tags

To set up user rights to create tags, follow these steps.

1. Go to **Settings > User Roles & Rights > [Role Name] > CRM**
2. Select any of the checkboxes in the "Tags" column

User Role/Right	Definition
Create Tag	Allows the user to create and add tags throughout Service Autopilot.
Create Tag Category	Allows the user to create new tag categories.

User Rights for Automation Access (Pro Plus Only)

To set up user rights for Automations, follow these steps.

1. Go to **Settings > User Roles & Rights > [Role Name] > CRM**
2. Select any of the checkboxes in the "Automation Access" column

User Role/Right	Definition
Create/Modify Automation	Allows the user to create new and modify existing Automations.
View Automation	Allows the user to view Automations.
Stop Automation	Allows the user to stop Automations that are currently running.
View Automation Tags	Allows the right to view Tags on Automations.
Add Automation Tags	Allows the right to add new Tags to Automations.

User Rights for Auto Assist Access (Pro Plus Only)

To set up user rights for Auto Assist Access, follow these steps.

1. Go to **Settings > User Roles & Rights > [Role Name] > CRM**

2. Select the checkboxes in the “Auto Assist Access” column

User Role/Right	Definition
Create/Modify Assist Categories	Allows the user to create new and modify existing Assist Categories.
Create/Modify Assists	Allows the user to create new and modify existing Assists.
View Assists	Allows the right to view Assists.

User Rights for Forms

To set up user rights for Forms, follow these steps.

1. Go to **Settings > User Roles & Rights > [Role Name] > CRM**
2. Select the checkboxes in the “Forms” column

User Role/Right	Definition
View/Create Forms	Allows the user to view existing forms and to create new forms. This right also affects the ability to include forms in emails to send to clients. If this right is not enabled, the user won’t see the **Forms** dropdown list when writing an email.
Edit Forms	Allows the user to edit existing forms. If unchecked, the user can still see a form and view responses to it, but they can’t add a new form or edit, publish, unpublish, or make any other changes to the Forms list.
View Office-Only Fields	Allows the user to view “Office only fields” located in forms.
Delete Responses	Allows the user to delete form responses.
Get Form Alerts	Gives an alert when a form has been filled out and submitted.

User Rights for Email Activity

To set up user rights view or access emails, follow these steps.

1. Go to **Settings > User Roles & Rights > [Role Name] > CRM**
2. Select any of the checkboxes in the "Email Activity" column

User Role/Right	Definition
View Email Activity	Allows the user to view email activity on the **CRM** tab. This will allow you to see emails sent, received, opened, bounced, rejected, or sent to spam, as well as their current status.
Can Remove Email from Spam List	Allows the user to remove emails marked as spam from the spam list.
Can Remove Email from Bounce List	Allows the user to remove emails that were added to the bounced list.

User Rights for Text Messages (Additional Subscription)

To set up user rights for Text Messages, follow these steps.

1. Go to **Settings > User Roles & Rights > [Role Name] > CRM**
2. Select the checkboxes in the "Text Messages" column

User Role/Right	Definition
View Message Center	Allows the user to view the Message Center under the CRM tab in Service Autopilot.
Remove Text Message Feed	Allows the user to remove text message feed from the message center.

Scheduling User Rights

User roles and rights for Scheduling are set under **Settings > User Roles & Rights > [Role Name] > Scheduling**.

User Rights for Scheduling Access

To set up user rights for scheduling functions, follow these steps.

1. Go to **Settings > User Roles & Rights > [Role Name] > Scheduling**
2. Select any of the checkboxes in the "Scheduling Access" column

User Role/Right	Definition
Calendar	Allows the user to view and edit the calendar.
Dispatch Board	Allows the user to view, edit, and dispatch jobs from the Dispatch Board.
Waiting List	Allows the user to view, edit, and dispatch jobs from the waiting list.
Teams	Allows the user to view and edit teams.
Add/Modify Projects	Allows the user view, create, and edit projects.
Dispatch Calendar	Allows the user to view, edit, and dispatch jobs from the dispatch calendar.
Asset Tracking	Allows the user to view, create, and edit assets in Service Autopilot.
View/Edit Asset Purchase Info	Allows the user to view and edit asset purchase information.
View/Edit Asset Forms	Allows the user to view and edit asset forms.
Get Schedule Alerts	Allows the user to receive scheduling alerts, such as: Master Package expiration warnings, Master Schedule expiration or changes, etc.

User Rights for Scheduling Reports

To set up user rights to run CRM reports, follow these steps.

1. Go to **Settings > User Roles & Rights > [Role Name] > Scheduling**
2. Select any of the checkboxes in the "Scheduling Reports" columns

User Role/Right	Definition
Job Cost Summary	Allows the user to run the report that shows summarized job costing information. This report can be filtered by date, resource, service, customer, and customer status.
Package Summary Report	Allows the user to run the report that breaks down information on master packages. This report can be filtered by master package
Package Sq Ft by Round	Allows the user to run the report that shows the amount of square feet assigned per round. This report can be filtered by custom field. Note: the client's square feet custom field must be filled out.
Client Count by Service	Allows the user to run the report that shows the number of clients per service and what percentage of your business it represents.
Chemical Tracking	Allows the user to run the report that shows the important recorded chemical tracking information. This report can be filtered by date, custom field, and form.
Over/Under Report	Allows the user to run the report that shows budgeted vs. actual amounts in visits, hours, and revenue. This report can be filtered by customer and contract.
Backlog Services	Allows the user to run the report that shows the accumulation of jobs waiting to be completed.
Sales Count by Sales Rep	Allows the user to run the report that shows a count of services and products sold by sales representatives. This report can be filtered by date, service/product, and sales rep.
Client Services Report	Allows the user to run the report that shows active services by client. Can be filtered by custom field, service, and customer.
Paused Services Report	Allows the user to run the report that shows what services have been paused.
Cost of Goods Sold Report	Allows the user to run the report that shows cost of goods sold information. This report can be filtered by date, service, completed jobs, jobs with no job time, and jobs with no amount.
Job Costing	Allows the user to run the Job Costing report.

Sales by Date Sold	Allows the user to run the report on Sales by Date Sold.
Sales by Date Sold Detail	Allows the user to run the report on Sales by Date Sold Detail.
Contractor Phone List	Allows the user to run the report that shows contact information for your contractors.
Vendor Contact List	Allows the user to run the report that that shows contact information for your third-party vendors.
Non-Inventory Product List	Allows the user to run the report showing any non-inventory product and its basic information. This report can be filtered by status.
Inventory Product List	Allows the user to run the report showing any inventory product and its basic information. This report can be filtered by status.
Export for Quality Driven Software	Allows the user to run the report that exports information for Quality Driven Software only.
Job Hours Summary	Allows the user to run the report that shows a list of employees and their total versus actual working time. This report can be filtered by date.
Resource Time Utilization	Allows the user to run the report that shows a breakdown of the non-productive time an individual employee had in any given time frame. This report can be filtered by date, period, and resource.
Product and Service Usage	Allows the user to run the report that shows the life of a service or product regarding quantity and amount in three different stages: estimate, job, and invoice. This report can be filtered by date, client, city, and zip code.
Visits Report	Allows the user to run the report that shows the status, actual versus budgeted hours of a service within a defined time frame. This report can be filtered by date, client, city, zip code, service, status, and resource.
Employee Directory	Allows the user to run the report that shows information about your company's employees. This report can be filtered to include contractors.
Revenue and Budgeted Hours Projection	Allows the user to run the report that shows projected budgeted hours and revenue for the next 12 months.
Custom Package Renewal Report	Allows the user to run the report that shows Custom Package renewals.

User Rights for Job Access

To set up user rights to view and manage jobs, follow these steps.

1. Go to **Settings > User Roles & Rights > [Role Name] > Scheduling**
2. Select any of the checkboxes in the “Job Access” column

User Role/Right	Definition
View Jobs	Allows the user to view jobs.
Add Job	Allows the user to add jobs to clients.
Cancel Job	Allows the user to cancel jobs.
Pause/Restart Job	Allows the user to pause and restart jobs.
Delete Job Comments	Allows the user to delete job comments.
Edit All Job Comments	Allows the user to edit all job comments.
Add/Remove Custom Package Line Items	Allows the user to add service line items to custom packages.

User Rights for the Company Directory

To set up user rights to view or edit the company directory, follow these steps.

1. Go to **Settings > User Roles & Rights > [Role Name] > Scheduling**
2. Select any of the checkboxes in the “Company Directory” column

User Role/Right	Definition
View Company Directory	Allows the user to view the company directory, which is a list of employees and vendors.
View Upcoming Schedule	Allows the user to view upcoming scheduled jobs.

User Rights for Employee Access

To set up user rights to view and manage employee records, follow these steps.

1. Go to **Settings > User Roles & Rights > [Role Name] > Scheduling**
2. Select any of the checkboxes in the “Employee Access” columns

User Role/Right	Definition
Manage Employees	Allows the user to view the employee list, view timesheets, and edit timesheets. To get this right, the user must also have any right enabled under **Home > Home Access**.
View Employee Information	Allows the user to view basic information on employee account screen.
View I-9 Information	Allows the user to view the employee’s I-9 information on the employee account screen.
View Attachments	Allows the user to view attachments on the employee account screen.
View Rating	Allows the user to view the employee’s rating on the employee account screen.
View Time Off	Allows the user to view the employee’s remaining vacation and sick time on the employee account screen.
View Resource Notes	Allows the user to view any employee notes on the employee account screen.
View Customer	Allows the user to see the client with whom a Ticket is associated in the employee’s timeline.
View Custom Fields	Allows the user to view the custom fields for employees on the employee account screen.
View User Settings	Allows the user to view a snapshot of the employee’s user settings on the employee account screen.
View License Info	Allows the user to view the employee’s license information on the employee account screen.
View Alerts	Allows the user to view what alerts an employee is scheduled to receive on the employee account screen.

Resolve Time Off Request	Allows the user to approve time off requests, including vacation and sick time.
Can Log Others Time Off	Allows the user to log another employee's time off on that employee's account screen.
Can Approve Own Time Off Request	Allows the user to approve their own requests for time off.
Add/Edit Applicants	Allows the right to add or edit applicants on the Applicants screen.
View Applicants	Allows the right to view applicants on the Applicants screen.
Add Employee	Allows the user to add a new employee.
Edit Employee	Allows the user to edit an existing employee.
Edit Photo	Allows the user to edit the photo for an employee.
Add/Remove Tag	Allows the user to add and remove resource tags.
Add Time Off	Allows the user to add a time off request.
Edit Time Off	Allows the user to edit time off requests after being requested.
Add/Edit Complaint	Allows the user to add and edit a complaint.
Add/Edit Compliment	Allows the user to add and edit a compliment.
Delete Complaint	Allows the user to delete a complaint.
Delete Compliment	Allows the user to compliment.
Modify Note Expiration	Allows the user to modify the expiration timeframe for a compliment or complaint.
View Default Schedule	Allows the user to view employee's default schedule.
Edit Default Schedule	Allows the user to edit employee's default schedule.
View Upcoming Schedule	Allows the user to employee's upcoming schedule.
Override Scheduled Days	Allows the user to override employee's schedule.
View Scheduled Work	Allows the user to an employee's scheduled jobs.
Reset Employee Password	Allows the user to reset an employee's password.

User Rights for Vendor Access

To set up user rights to view and manage vendors, follow these steps.

1. Go to **Settings > User Roles & Rights > [Role Name] > Scheduling**
2. Select any of the checkboxes in the "Vendor Access" columns

User Role/Right	Definition
Manage Vendors	Allows the user to view the vendor list.
View Vendor Information	Allows the user to view information on vendor account screen.
View I-9 Information	Allows the user to view the vendor's I-9 information on the vendor account screen.
View Attachments	Allows the user to view attachments on the vendor account screen.
View Rating	Allows the user to view the vendor's rating on the vendor account screen.
View Time Off	Allows the user to view the vendor's remaining vacation and sick time on the employee account screen.
View Timeline Section	Allows the user to view the vendor's timeline information on the vendor account screen.
View Resource Notes	Allows the user to view vendor notes on the vendor account screen.
View Customer	Allows the user to see the client a Ticket is associated with in the vendor's timeline.
View License Info	Allows the user to view the vendor's I-9 information on the vendor account screen.
View Custom Fields	Allows the user to view the custom fields for vendors on the vendor account screen.
View User Settings	Allows the user to view the vendor's I-9 information on the vendor account screen.
View Alerts	Allows the user to view the vendor's I-9 information on the vendor account screen.
Add Vendor	Allows the user to add a new vendor.

Edit Vendor	Allows the user to edit an existing vendor.
Edit Photo	Allows the user to edit the photo for a vendor.
Add/Remove Tag	Allows the user to add and remove resource tags.
Add Time Off	Allows the user to add time off request.
Edit Time Off	Allows the user to edit time off requests after being requested.
Add/Edit Complaint	Allows the user to add and edit a complaint.
Add/Edit Compliment	Allows the user to add and edit a compliment.
Delete Complaint	Allows the user to delete a complaint.
Delete Compliment	Allows the user to compliment.
Modify Note Expiration	Allows the user to modify the expiration timeframe for a compliment or complaint.
View Default Schedule	Allows the user to view vendor's default schedule.
Edit Default Schedule	Allows the user to edit vendor's default schedule.
View Upcoming Schedule	Allows the user to vendor's upcoming schedule.
Override Scheduled Days	Allows the user to override vendor's schedule.
View Scheduled Work	Allows the user to a vendor's scheduled jobs.
Edit Vendor Password	Allows the user to reset a vendor's password.

User Rights for Chemical Tracking

To set up user rights for working with Chemical Tracking, follow these steps.

1. Go to **Settings > User Roles & Rights > [Role Name] > Scheduling**
2. Select any of the checkboxes in the "Chemical Tracking" column

User Role/Right	Definition
Add/Edit Usage	Allows the user to add and edit chemical usage for chemical jobs on the Dispatch Board.
Create UoM	Allows the user to create units of measure for chemical tracking.
Create Mix	Allows the user to create chemical mixes.
Create Application Method	Allows the user to create application methods for chemical tracking.
Create Target	Allows the user to create targets for chemical tracking.
Create Custom Field	Allows the user to create custom fields when creating a price matrix for a chemical product.

Accounting User Rights

User roles and rights for Accounting are set under **Settings > User Roles & Rights > [Role Name] > Accounting**.

User Rights for Accounting Access

To set up user rights for access to the Accounting functions in SA, follow these steps.

1. Go to **Settings > User Roles & Rights > [Role Name] > Accounting**
2. Select any of the checkboxes in the "Accounting Access" column

User Role/Right	Definition
View Client Invoices	Allows the user to view client invoices on the client account screen.
View Invoice List	Allows the user to view the invoice list screen.
Add/Modify Invoices	Allows the user to create and modify invoices.
View Client Payments	Allows the user to view client payments on the client account screen.
View Payment List	Allows the user to view the payments list screen.
Add/Modify Payments	Allows the user to create and edit payments on an invoice, and to email paid invoices from the Client screen.
Delete Card Payments	Allows the user to delete credit card payments.
Delete ACH Payments	Allows the user to delete ACH payments. Automated Clearing House (ACH) payments are available to some Members who use Clearent payment processing.
View Expenses	Allows the user to view expenses and the expense list.
Add/Modify Expenses	Allows the user to create and modify expenses.
Process CC Payment Refunds/Voids	Allows the user to view and utilize the Refund and Void buttons on the payment overlay. The Refund button appears when the transaction is settled; otherwise, you'll have the option to void the payment. The right to Save changes also requires you set the "Add/Modify Credits" right below.

View Credits	Allows the user to view credits on the client account screen and the credit list screen.
Add/Modify Credits	Allows the user to create and modify credits. This right allows the **Save** button on refunds in conjunction with the right "Process CC Payment Refunds/Voids" listed above.
View Adjust Balances	Allows the user to view the "Adjust Balance" option on the client account screen.
Add/Modify Adjust Balances	Allows the user to create and modify the "Adjust Balance" option on the client account screen.
View Timesheets	Allows the user to view and edit timesheets. The user must also have a **Home Access** right enabled under **Home > Home Access**, and the **Manage Employees** right enabled under **Scheduling > Employee Access**.
Create Invoices	Allows the user to create invoices for contracts, snow, and subscriptions.
View USPS Jobs	Allows the user to view invoices on the **Mail on Demand** screen.
QB Reconciliation	Allows the user to view the QuickBooks Confirmation page under the accounting menu to prevent duplicate transactions when a response from QuickBooks is not received. This is visible only if you sync with QuickBooks Desktop.
Add/Modify Purchase Orders	Allows the user to create and modify purchase orders.
View Bulk Price Update	Allows the user to access this feature and update the prices for active recurring jobs.

User Rights for Accounting Reports

To set up user rights for access to the Accounting reports in SA, follow these steps.

1. Go to **Settings > User Roles & Rights > [Role Name] > Accounting**
2. Select any of the checkboxes in the "Accounting Reports" columns

User Role/Right	Definition
Invoiced Income by Client	Allows the user to run the report that shows a list of invoiced income by listed by client. This report can be filtered by date.
Invoiced Products	Allows the user to run the report that shows any invoice containing products charged to the client. This report can be filtered by date, sales rep, and product.
Invoices with Balances	Allows the user to run the report showing a list of invoices that are open or past due with the amount owed. This report can be filtered by date.
Pre-Payments	Allows the user to run the report that shows all pre-payments entered. This report can be filtered by date and unused amount.
Credit Memo	Allows the user to run the report showing any clients that have a positive balance. This report can be filtered by date.
Sales Tax Report	Allows the user to run the report that shows the amount of sales tax collected. This report can be filtered by date.
A/R Aging Report	Allows the user to run the report that shows unpaid invoices for the current period to 90+ days. This report can be filtered date and sales rep.
A/R Aging Snapshot	Allows the user to run the report that shows each client's account balance, last invoice and last payment received. This report can be filtered by account balance.
Profit/Loss – Cash Basis	Allows the user to run the report that shows total profit after discounts and taxes. This report can be filtered by date.
Profit/Loss – Accrual Basis	Allows the user to run the report that shows revenue regardless of whether payment was received. This report can be filtered by date.

Revenue by Service Summary	Allows the user to run the report that shows a summary of how much revenue a service produced. This report can be filtered by period, summary, and date.
Revenue per Service	Allows the user to run the report showing revenue that a service produced per visit. This report can be filtered by date, resource, and sales rep.
Daily Production	Allows the user to run the report that shows whether a job is completed or still dispatched. This report can be filtered by date, resource, sales rep, and custom field.
Payment Audit Summary	Allows the user to run the report showing what payments came in and how they were paid. This report can be filtered by date.
Invoice Audit Summary	Allows the user to run the report that shows a list of invoices with invoice totals and the services performed. This report can be filtered by date and sales rep.
Sales Activity Summary	Allows the user to run the report that shows services sold by sales rep. This report can be filtered by sales rep and date.
Sales Activity Detail	Allows the user to run the report that shows services and products sold by sales rep along with the estimate with which they are associated. This report can be filtered by sales rep and date.
Revenue by Postal Code	Allows the user to run the report that shows revenue grouped by zip code. This report can be filtered by date, zip code, and service.
Booked Revenue by Sales Rep	Allows the user to run the report that shows what services were sold by what sales rep, and the revenue it produced. This report can be filtered by date and sales rep.
Income Not Invoiced	Allows the user to run the report that shows any services that are not in pending status and have not been invoiced. This report can be filtered by date and status.
Unapplied Payments	Allows the user to run the report showing any payments that have not been applied to an invoice. This report can be filtered by date.
Sales Commission Export	Allows the user to run the report showing what service was sold by sales rep, including the total invoiced amount per service. This report can be filtered by date, sales rep, and service.

User Rights for Statistic Access

To set up user rights for access to the Accounting Statistic functions in SA, follow these steps.

1. Go to **Settings > User Roles & Rights > [Role Name] > Accounting**
2. Select any of the checkboxes in the "Statistic Access" column

User Role/Right	Definition
Add/Edit Statistic Type	Allows the user to create and edit statistic types.
Add/Edit Statistic	Allows the user to create and edit statistics.
Remove Statistic Type	Allows the user to delete statistic types.
Remove Statistic	Allows the user to delete statistics.

User Rights for Class Access (QuickBooks Desktop Only)

To set up user rights for access to the QBD functions in SA, follow these steps.

1. Go to **Settings > User Roles & Rights > [Role Name] > Accounting**
2. Select any of the checkboxes in the "Class Access" column

User Role/Right	Definition
View Classes	Allows the user to view classes.
Add/Edit Classes	Allows the user to create and edit classes.
Delete Classes	Allows the user to delete classes.

User Rights for Payroll Access

To set up user rights for access to the Payroll functions in SA, follow these steps.

1. Go to **Settings > User Roles & Rights > [Role Name] > Accounting**.
2. Select any of the check boxes in the "Payroll Access" column.

User Role/Right	Definition
Show Pay Rate	Allows the user to view pay rates for employees.
Show Wage Burden	When this right is enabled, the role will be able to see a "Total Pay" column on the Timesheets screen.
Can Approve Timesheets	Allows the user to approve employee timesheets.
Can Unapprove Timesheets	Allows the user to remove the "Approved" status from employee timesheets.
View Payroll Report	Allows the user to use the Payroll Report feature.
View Wall Clock	Allows the user to access and set up the Wall Clock feature in SA.
Employee – View Payroll	Allows the user to see the **Payroll / Job Costing** tab for another employee.
Vendor – View Payroll	Allows the user to see the **Payroll / Job Costing** tab for another employee (this might need to be unchecked for an external accountant or other non-direct employee).

Mobile User Rights

User roles and rights for the Team app are listed below, and Legacy app rights are listed in the next section.

Team App User Rights

To set up user rights for the Team app, follow these steps.

1. Go to **Settings > User Roles & Rights > [Role Name] > Mobile**
2. Select any of the checkboxes needed

User Role/Right	Definition
Enable Push Notifications	Allows the Team app user to receive push notifications
Access App Settings	Allows the Team or Legacy app user to view and edit the Team app or Legacy app settings
Edit Job Quantity	Allows the Team or Legacy app user to edit per-unit quantity for services
Edit Product Quantity	Allows the Team or Legacy app user to edit the quantity for products
Add Service	Allows the Team app user to create one-time jobs for properties that already exist on the schedule, and Legacy app users can create a new one-time job
Add Product	Allows the Team or Legacy app user to add products to existing jobs, and Legacy app users can add installed products to clients
Edit Timesheets	Allows the Team app user to edit the time their team spent on each service (but not the time they clocked in and out for the day)
Require "Before" Pictures	Prompts the Team or Legacy app user to take a photo before starting a job
Require "After" Pictures	Prompts the Team or Legacy app user to take a photo after completing a job
Edit Team	Allows the Team or Legacy app user to add/remove resources from the job team

View/Submit Forms	Allows the Team app user to view and submit V3 Forms, and the Legacy app user to view and submit V2 Forms

Legacy App User Rights

To set up user rights for the Legacy App, follow these steps.

1. Go to **Settings > User Roles & Rights > [Role Name] > Mobile**
2. Select any of the checkboxes needed

User Role/Right	Definition
View/Edit Client	Allows the Legacy app user to view and edit client information: **Always -** Allows the user to view and edit client information at any time. **When Assigned Job** - Allows the user to view and edit the client information only when jobs are dispatched.
Auto-Download Clients	This will download the client list and keep it stored in Legacy app tables.
View Account Balance	Allows the Legacy app user to see the client's account balance and lead's potential revenue.
Contact Client	Allows the Legacy app user to contact clients and leads: **Send Emails From**: **- Company -** Places the company email address in the "From" email address **- Employee -** Places the employee's email address in the "From" email address
View Leads	Allows the Legacy app user to view the lead list, as well as the right to view/edit a lead.
View Vendors	Allows the Legacy app user to view the vendor list and view/edit a vendor.
Make Work Assignments	Allows the Legacy app user to reassign work to another resource.

Edit Client Notes	Allows the Legacy app user to update notes to the client that appear on work order sheets, the Dispatch Board, and the client timeline view.
View Work Order	Allows the Legacy app user to view the work order and collect a signature on it.
Can Wipe Devices Remotely	Allows the user to wipe Legacy app data from a device under **Settings > User Roles & Rights > Mobile**.
Enable Push Notifications	This is for the Team app only.
Enable Drive Time	Allows the Legacy app user to track drive time.
Show Everyone's Work	Allows the Legacy app user to see job information for all resources.
Edit GPS Settings	Allows the Legacy app user to edit GPS settings.
Access App Settings	Allows the Team or Legacy app user to view and edit the app settings
Edit Job Quantity	Allows the Team and Legacy app user to edit the quantity for jobs
Edit Product Quantity	Allows the Team and Legacy app user to edit the quantity for products
View Product Cost	Allows the Legacy app user to view the product cost
Edit Product Cost	Allows the Legacy app user to edit the product cost
Edit Schedule Date	Allows the Legacy app user to move a job to a different date
Add Service	Allows the Team and Legacy app user to create a one-time job
View Rate	Allows the Legacy app user to view the rate for both services and products
Edit Rate	Allows the Legacy app user to edit the rate for both services and products
Add Waiting List Service	Allows the Legacy app user to create a waiting list job
Add Product	Allows the Team and Legacy app user to add products to existing jobs and installed products to clients

View Invoices	Allows the Legacy app user to view invoices for clients and invoices for completed jobs
Create Invoices	Allows the Legacy app user to create standalone invoices for clients, and edit invoices for completed jobs
Confirm Products	Allows the Legacy app user to confirm products on invoices for completed jobs
Edit Invoice Description	Allows the Legacy app user to edit the invoice description for both services and products
View Payments	Allows the Legacy app user to view payments for clients
Collect Payment	Allows the Legacy app user to collect payments for open invoices only
Require Chemical Logging	Requires Legacy app users to log chemical tracking information on jobs before completing them
Edit Timesheets	Allows the Legacy app user to adjust the time their team spent on each service and the time they clocked in and out for the day
Dispatch from Mobile	Allows the Legacy app user to start jobs from the calendar view
Hide Printed Job Notes	If route sheets are printed along with the use of the Legacy app, this will prevent job notes from being printed
Monitor Geofences	This is future functionality
Enable Estimates	Allows the Legacy app user to create estimates for clients and leads if they have access to clients and leads
Enable Expenses	Allows the Legacy app user to create expenses
Enable Bulk Clock In	Allows the Legacy app user to bulk clock-in to multiple jobs at one time, as well as multiple services at one time
Require View Job Notes	Forces the user to view and acknowledge job notes on the Legacy app before starting a job
Require "Before" Pictures	Prompts the Team or Legacy app user to take a photo before starting a job
Require "After" Pictures	Prompts the Team or Legacy app user to take a photo after completing a job

Edit Team	Allows the Team or Legacy app user to add/remove resources from the job team
Allow Copy Route	Allows the Legacy app user to copy a route; this is for the Snow system only
View Assets	Allows the Legacy app user to view assets and the asset list
Edit Assets	Allows the Legacy app user to edit any assets
View/Edit Asset Purchase Info	Allows the Legacy app user to view or edit information on the purchase of assets
View/Submit Forms	Allows the Legacy app user to view and edit V2 Forms and the Team app user to view and edit V3 Forms
View/Submit Asset Forms	Allows the Legacy app user to view and edit asset forms