

Role Permissions Summary:

- **Member Admin Agent:** Possesses the most comprehensive permissions, including the authority to manage price lists and Time & Materials (T&M) terms.
- **Member Estimator:** Holds the majority of permissions, with the exception of access to view or manage price lists and T&M terms.
- **Member Field Agent:** Has restricted access and lacks the capability to add billable items to a job page.

Full Descriptions

Member Admin Agent:

- Authorized to create new jobs and new customers.
- **Job Management:**
 - Can initiate new jobs.
 - Can modify all job information.
 - Can participate in job discussions.
 - Can add and view photographs.
 - Can add and view files and forms.
 - Can view the schedules of all company users and create new tasks.
 - Can edit price lists and T&M terms on current jobs, company profiles, and customer profiles.
 - Can create new Rough Order of Magnitude (ROM) areas and develop estimates.
 - Has full access to T&M billing functions.
- **Company Profile:**
 - Can edit all company information.
 - Can add new users and manage user notification settings.
 - Can create new and modify existing price lists and T&M terms.
 - Can connect the Quickbooks account.
 - Can change project milestones.
- **Customer Profile:**
 - Can edit all customer information.
 - Can add customer users.
 - Can create new and modify existing price lists and T&M terms.
- **Additional Permissions:**
 - **Hub:** Has full access to hub components and posting.
 - **Job Board:** Can view all company jobs.
 - **Customer Board:** Can view all customer profiles.
 - **Schedule:** Can view the schedules of all company users.
 - **Forms:** Can create new and modify current forms.
 - **Map:** Can view all map components.
 - **Inventory:** Can add new items and modify current inventory.

Member Estimator:

- Authorized to create new jobs and new customers.
- **Job Management:**
 - Can initiate new jobs.
 - Can modify all job information.
 - Can participate in job discussions.
 - Can add and view photographs.
 - Can add and view files and forms.
 - Can view the schedules of all company users and create new tasks.
 - Can create new ROM areas and develop estimates.
 - Has full access to T&M billing functions.
 - **Is NOT permitted to edit job-specific price lists and T&M terms.**
- **Company Profile:**
 - Can edit all company information.
 - Can add new users and manage user notification settings.
 - **Is NOT permitted to create new or modify existing price lists and T&M terms.**
 - Can connect the Quickbooks account.
 - Can change project milestones.
- **Customer Profile:**
 - Can edit all customer information.
 - Can add customer users.
 - **Is NOT permitted to create new or modify existing price lists and T&M terms.**
- **Additional Permissions:** (Identical to Admin Agent permissions)
 - **Hub:** Has full access to hub components and posting.
 - **Job Board:** Can view all company jobs.
 - **Customer Board:** Can view all customer profiles.
 - **Schedule:** Can view the schedules of all company users.
 - **Forms:** Can create new and modify current forms.
 - **Map:** Can view all map components.
 - **Inventory:** Can add new items and modify current inventory.

Member Field Agent:

- **Is NOT authorized to create new jobs or new customers.**
- **Job Management:**
 - Can view all job information; **is NOT permitted to edit.**
 - Can participate in job discussions.
 - Can add and view photographs.
 - Can add and view files, but **NOT forms.**
 - Can view their own schedule and create new tasks for themselves.
 - Can create new ROM areas, but **is NOT permitted to develop estimates/reserves.**

- **Has NO access to the T&M billing page.**
- **Company Profile:**
 - Can **ONLY view** company information.
 - Can manage user notification settings.
 - **Is NOT permitted to create new or modify existing price lists and T&M terms.**
 - Has **NO access** to Quickbooks linking or milestones.
- **Customer Profile:**
 - **Is NOT permitted to create new profiles, view current profiles, or make any modifications.**
- **Additional Permissions:**
 - **Hub:** Has full access to hub components and posting.
 - **Job Board:** Can view all company jobs.
 - **Schedule:** Can view **ONLY their own** schedule.
 - **Map:** Can view all map components.
 - **Is NOT permitted to view any customer profiles.**
 - **Is NOT permitted to view or create forms.**
 - **Is NOT permitted to add new items or modify the current inventory list.**