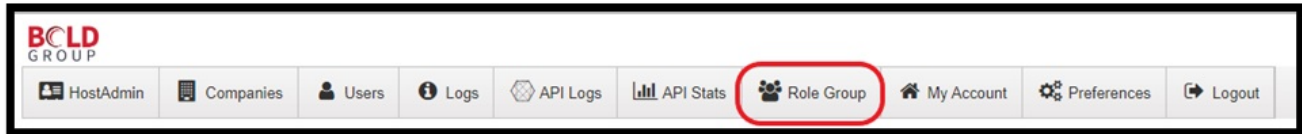


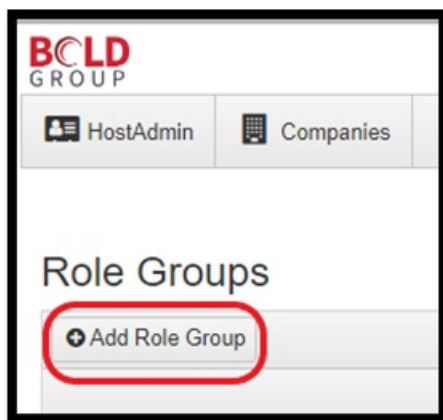
Custom Role Group Permissions for Sedona-X Mobile

12/28/2023 3:52 pm EST

To create a new Role Group in the API, you will need to open the Role Group tab in the API.



Then, Add Role Group.



Add a Group Name. The Description will be an option. Note: If a custom role group was created by Support, we will usually note the ticket it was created for there.

Next, Open the API permission to open the whole permissions tree.

Note: If you are unsure of what permissions to add to the Role Group, we recommend using Role Groups that are currently in use as a guide for what you want the technicians to have. For example, you can look at the Default Sr. Tech Role Group as a guide and then add any extra permissions that aren't currently available to that Role, or not include permissions you do not want techs to have access to.


Add Role Group

Group Name:

Group Description:

Permissions ⓘ

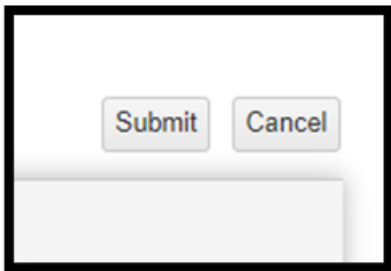
- API
- ▶ APP
- ▶ ACH
- ▶ APBILL
- ▶ ARPAYMENT
- ▶ BRANCH
- ▶ CATEGORY
- ▶ CHECK
- ▶ COLLECTIONSTATUS
- ▶ CONTRACTFORM
- ▶ CREDIT
- ▶ CREDITDETAIL
- ▶ CREDITREASON
- ▶ CRITICALMESSAGE



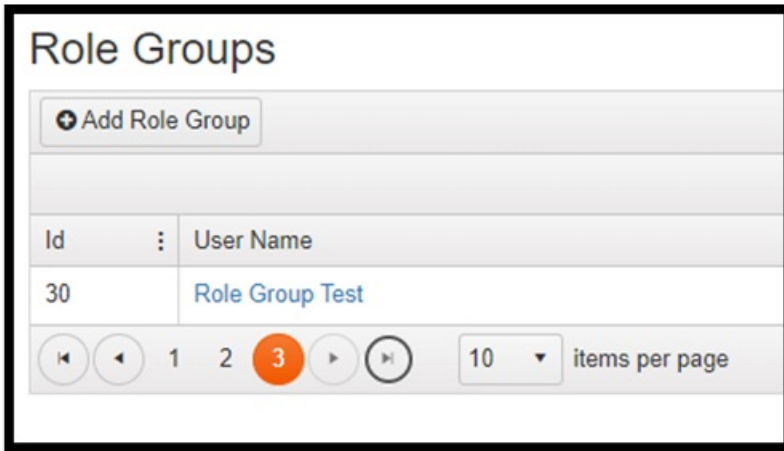
You can now add the necessary permissions. See below for example.

- ▶ ITEM
- ▶ JOB
 - JOB
 - GETALL
 - SEARCH_JOB
 - POST_JOB
 - UPDATE_JOB
 - JOB_QUEUE
 - ▶ {JOBID}
 - JOBWIZARDDATA

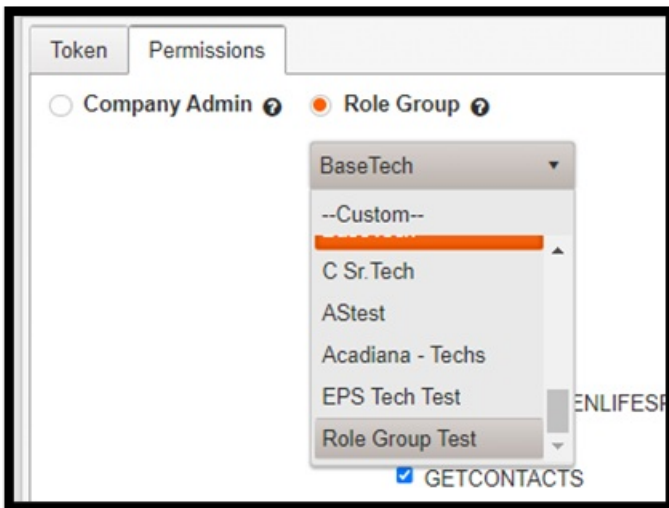
I've marked a few items that I want to grant permissions for in this new group I've created. Once all permissions you want to be granted to this group are added, go to the Submit button in the top right of the screen.



Click Submit to save.
You should now see the custom Role Group in the Role Groups list.



When you go to a user, you will see the group in their Role Group dropdown list.



Note: Any changes made to the Custom Role Group by editing it will not automatically update the group if it is currently selected for a tech. You will need to go to any techs/users who have the permission selected and change the group they have selected to something else and then switch it back again. You can check the permissions of the user to see that it is updated.