

How to Apply Permissions for Sedona-X in API

02/09/2024 12:19 pm EST

Issue:

Technicians cannot do certain things in Sedona-X such as Add Payment Method or Reschedule Appointments. Technicians are granted access to the Manager Role Group, but they don't have access to everything they need.

Resolution:

This is likely due to some of the selectable permissions not being marked on the user. While they may be granted access to the Manager Role Group, if they are not allowed access to those other items, which are not included in the Role Groups, then they will not be able to access them.

See image below. The group of optional permissions grants further access is boxed in red.



For example: Mark the Add Payment box if you wish for your techs to be able to add new payment methods instead of using what is already available to the customer.

Or, if you wish for the technician to access closed tickets, then you can mark the Closed Ticket option.

Closed Tickets and Add Payment Method are the most common permissions that get missed.