

How To Grant Access to All Items in Customer Accounts

12/05/2024 8:45 am EST

Issue:

User is unable to access anything under customer accounts. They are able to open Jobs using Job Management > Job Queue and Service Tickets by opening the Service Module but cannot access that within the customer account. When they try to open a Service Ticket or Job from the customer account, nothing happens. No errors or messages appear.

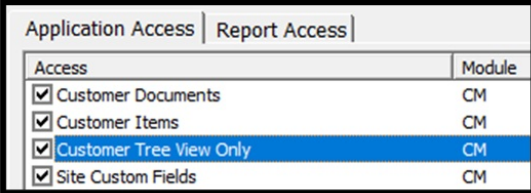
Resolution:

This is due to permissions.

Go to SedonaSetup > User Groups

Find the User Group assigned to the user or users experiencing this issue.

The Client Management permission are at the top, so scroll to the permission labeled Customer Tree View Only.



Application Access	Report Access
Access	Module
<input checked="" type="checkbox"/> Customer Documents	CM
<input checked="" type="checkbox"/> Customer Items	CM
<input checked="" type="checkbox"/> Customer Tree View Only	CM
<input checked="" type="checkbox"/> Site Custom Fields	CM

The box will most likely be marked. Unmark the box and click Apply to save the change.

The user should now be able to access Jobs and Service Tickets, as well as everything else they should have permissions to access, under the Customer accounts.
