User Roles and their Permissions [New]

This guide clarifies the permissions granted to each user role within OnceHub: Account Owner, Administrator, Team Manager, and Member. Each section details specific functionalities, summarized in easy to understand tables.

The Account Owner: Ultimate Control

The Account Owner holds the highest level of access and permissions in OnceHub. While possessing all Administrator capabilities, they also have exclusive rights:

- **Account Deletion:** Only the Account Owner can permanently delete the OnceHub account.
- **Ownership Transfer:** The Account Owner can transfer their role to another user within the account. Upon transfer, the previous Account Owner becomes an Administrator.
- **Non-Transferable Role:** No other user can transfer account ownership, ensuring the Account Owner maintains control until a formal transfer.

These privileges allow the Account Owner to maintain overall authority while delegating responsibilities for operational efficiency.

Subscription Management

Administrators have full access to manage and alter subscription plans, purchase seats, and add SMS credits, while Team Managers and Members can not make any changes.

Role	Manage Subscriptions	Purchase Seats	Purchase SMS Credits
Administrator	Yes	Yes	Yes
Team Manager	No	No	No
Member	No	No	No

Seats Management

Seat management permissions control the allocation and removal of seats within the platform.

Role	Assign Seats	Unassign Seats	Purchase Additional Seats

Administrator	Yes	Yes	Yes
Team Manager	Yes (team only)	Yes (team only)	No
Member	No	No	No

Key Notes: Team Managers can manage seats for their team members only. Members cannot assign or manage seats.

User Management Permissions

User management permissions encompass editing roles, assigning team managers, and transferring ownership, as detailed below.

Role	View All Users	Edit User Roles	Assign Team Manager Role	Delete Users
Administrator	Yes	Yes	Yes	Yes
Team Manager	Only team members	No	No	No
Member	No	No	No	No

Key Notes: Administrators manage roles, Team Managers handle teams, and Members have no user management permissions.

Contact Management Permissions

Contact management permissions define the level of access users have to view, edit, and manage guest contact records within OnceHub.

Role	View All Contacts	Edit or Manage Contact Details	Delete Contact
Administrator	Yes (all contacts across the account)	Yes	Yes
Team Manager	Yes (team only)	Yes (team only)	No
Member	Only contacts they own	Only contacts they own	No

Integrations

Users can connect and manage integrations, but with varying levels of access based on their role.

Role	Connect Integrations	Manage Settings	Disconnect Integrations

Administrator	Yes (own and account integrations)	Yes	Yes (own and account integrations)
Team Manager	Yes (own only)	Yes (team only)	Yes (own only)
Member	Yes (own only)	Yes (own only)	Yes (own only)

Key Notes: Members can manage their personal integrations but cannot alter settings or disconnect integrations for others.

Booking Calendars Permissions

Booking calendar permissions dictate who can create and manage calendars, including team-specific usage, as detailed below.

Role	Create Calendars	Edit Calendars	Delete Calendars	Set Hosts
Administrator	Yes	Yes	Yes	Yes
Team Manager	Yes	Yes	Yes (team only)	Yes (team only)
Member	Yes	Yes (own only)	Yes (only own)	No

Key Notes: Administrators have unrestricted access. Team Managers can work on calendars within their team, while Members are limited to their personal ones.

Chatbots Permissions

Chatbot permissions determine which roles can create, edit, and publish bots.

Role	Create Chatbots	Edit Chatbots	Publish Chatbots	Delete Chatbots
Administrator	Yes	Yes	Yes	Yes
Team Manager	Yes (team only)	Yes (team only)	Yes (team only)	Yes (team only)
Member	Only own	Only own	Only own	Only own

Key Notes: Administrators need to give Team Managers and Members access to Chatbots to be able to work with them.

Routing Forms Permissions

Routing form permissions cover who can create, edit, and publish forms for user workflows.

Role	Create Forms	Edit Forms (Team)	Publish Forms	Delete Forms
Administrator	Yes	Yes	Yes	Yes
Team Manager	Yes (team only)	Yes (team only)	Yes (team only)	Yes (team only)
Requires permission	Only own	Only own	Only own	Only own

Key Notes: Administrators need to give Team Managers and Members access to Chatbots to be able to work with them.

Final Notes

- **Role-specific Functionality:** Always consider team-specific roles when granting permissions. Team Managers control their teams, but cannot access areas outside of their scope.
- **Support:** For any adjustments or unique setup needs, reach out to your account administrator or technical support.