Pike13

Staff Member Permissions Guide

	Owner	Mgr.	Staff	Limited Staff
Services				
Add classes, appointments, and courses	✓	✓		
Edit classes, appointments, and courses	✓	✓		
Change instructors for a class	✓	✓	✓	
Cancel classes, appointments, and courses *Staff members can cancel appointments that they are leading.	✓	✓	✓	
Schedule/reschedule classes and courses, and appointments *Staff members cannot schedule classes or courses.	✓	✓	✓	
Enroll in clients in a service *Limited Staff can only enroll their own classes and appointments, not courses.	✓	✓	✓	✓
Book appointments	✓	✓	✓	
Cancel an appointment or enrollment in a class	✓	✓	✓	
Set a cancellation policy	✓	✓		
Add a note to a class *Limited Staff can only leave private notes unless permission is given to send public notes.	✓	✓	✓	✓
Plans & Passes				
Add new plans and passes	✓	✓		
Modify plans and passes	✓	✓		
Modify plan prices	✓	✓		
Change and create revenue categories	✓	✓		
Sell plans, passes, and retail products	✓	✓	✓	
Put a plan on hold	✓	✓	✓	
Cancel a plan	✓	✓	✓	

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Staff				
Add new staff members	✓	✓		
Edit staff member availability for appointments	✓	✓	✓	
Block out hours on the schedule	✓	✓	✓	
Set and adjust pay rates *Managers can only if permission is given	✓	✓		
Run payroll	✓			

	Owner	Mgr.	Staff	Limited Staff
Clients				
Add clients	✓	✓	✓	
See and edit client profile information	✓	✓	✓	
Deactivate clients	✓	✓		
See the roster and take attendance *Limited Staff only for the services they provide	✓	✓	✓	✓
Remove clients from services	✓	✓	✓	
Add and revise custom client fields	✓	✓		
Collect waiver signatures	✓	✓	✓	
Create public notes *Permission has to be given for Limited Staff	✓	✓	✓	✓
Create private notes	✓	✓	✓	✓
Delete notes	✓	✓		

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Integrations, Payments, Profiles, Reporting, and Website				
Take payments from clients	✓	✓	✓	
Refund payments and void charges	✓	✓	✓	
Add account credit to client accounts	✓	✓		
Set account credit limits	✓			
Reconcile unpaid visits	✓	✓	✓	
Discount an upcoming renewal	✓	✓	✓	
Update credit card information	✓	✓	✓	
Review profile, purchases, account details, signed documents	✓	✓	✓	
Create online documents	✓	✓		
See business financial data *Reporting access can be given to any staff member by owners	✓			
See business reports *Reporting access can be given to any staff member by owners	✓	✓		
Manage notifications	✓	✓	✓	✓
Customize Pike13 website	✓	✓		
Zapier Integration	✓			