

Roles

DOCUMENTATION · STAFF & HR

Roles and permissions

Everyone gets the pages their day needs. The rest — the books, the phone system, the settings — stays with administrators unless you tick a box to let someone in.

At a glance

- **There are two roles:** Admin, who can do everything, and User.
- **Every user has the day-to-day pages** — the dashboard, the dial pad, their own voicemail and the hotel desk.
- **Admin areas are opened one by one**, per person, with a tick.
- **Changes apply at once.** A demoted admin loses access on their next click.
- **You can sign anyone out of the Windows app** from the same page.

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1 The two roles

Admin

Every area, always. Manages people, settings, the subscription and the bill. Not listed in the permissions grid, because there is nothing to grant.

THE OWNER AND WHOEVER RUNS THE SYSTEM

User

The day-to-day pages, plus any admin areas you have ticked for them personally.

EVERYBODY ELSE

The idea is simple: **only the admin areas are locked**. A receptionist can take calls, check a guest in and listen to their voicemail on day one, without anyone setting a permission.

Signing in at all is a separate switch. Someone added without **Can sign in to this web interface** has no access to grant — see [Let them sign in](#).

2 The areas you can grant



Staff & Extensions

Add and edit people, departments, extensions, handsets and phone provisioning.



Phone System

Trunks, gateways, routing, caller-ID masking, feature codes and call-control rules.



Accounting

The books: invoicing, ledger, day book, purchases, payroll and statements.



Stock & Stores

Stores, stock tracking, recipes, issues, wastage and physical counts.



Front Desk

Rooms, bookings, check-in and check-out, guest folios, wake-up calls and the desk tills.



Restaurant manager

Cancel food already cooking, discounts above the limit, comps, bill voids, menu and floor setup. Includes the Front Desk and managing every till.



Service Connectors

Outside services, CRMs, databases, mail, payment gateways and registering card machines.



SMS & Auto Dialer

SMS providers and templates, and the automatic outbound dialer.



Call Records & Logs

Call records for every extension, the TV wallboard and the system log.



System Settings

Appearance, modules, office hours, the firewall and voicemail defaults.



Machine Administration

Backup and restore, updates, network, health, support and first-time setup.

You see only the areas your business runs: **Front Desk** is listed for a hotel and **Restaurant manager** for a restaurant — a business with neither sees neither.

3 Give someone an area

- 1 Open **Tune up** → **Permissions**. You must be an admin.
- 2 Find the person. Each is shown with their name and extension.
- 3 Tick the areas they should have. Untick to take one away.
- 4 Click **Save** on their row.

Permissions

Meera Iyer · Ext 109

☒ Accounting

☒ Stock & Stores

Front Desk · Phone System · System Settings — not ticked

Save

- A grant belongs to the **person**, not to a job title. Two cashiers can hold different areas.
- **Restaurant manager** brings **Front Desk** with it.
- The Permissions page itself can never be granted — only an admin decides who gets what.

4 Make someone an admin

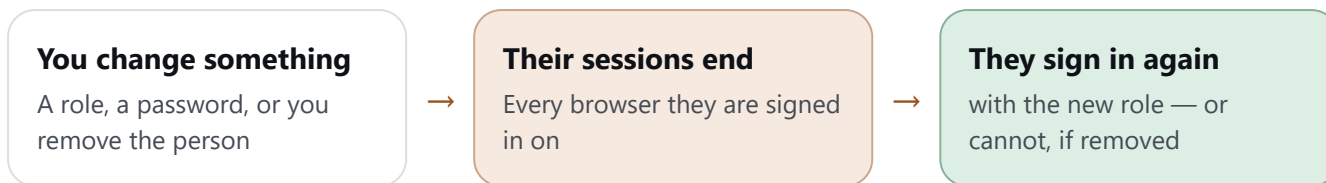
- 1 Open **Office** → **Employees** and click the pencil on the person's row.
- 2 Change **Role** from **User** to **Admin** and save.

The foot of the Permissions page lists every administrator, so you can always see who has full access.

Keep admins few. An admin can see salaries, change the subscription and remove people. For most managers, a couple of ticked areas is the right answer.

5 Sign-ins and signing out

Access is checked on every page, not only at sign-in — so what you change takes effect straight away:



Nobody keeps yesterday's access because a browser was left open.

Under **Windows app sign-ins**, the Permissions page lists each person signed in to the Windows app, with when they signed in and when they were last seen. Click **Sign out** to end one — for a lost laptop or someone who has left.

6 Who should have what

PERSON	ROLE	AREAS TO TICK
Owner, general manager	Admin	— everything already
Accountant, bookkeeper	User	Accounting; Stock & Stores if they value stock
Front office manager	User	Front Desk; Staff & Extensions
Restaurant manager	User	Restaurant manager
Storekeeper	User	Stock & Stores
IT or phone technician	User	Phone System; Staff & Extensions
Receptionist, waiter, agent	User	None — the day-to-day pages are enough

7 Questions

- Someone says a page is “not permitted”.

It is in an admin area they have not been granted. Tick that area for them on Permissions, or do the task yourself.

- Can staff see each other's voicemail or call records?

A user reaches their own voicemail. Call records for every extension are in **Call Records & Logs**, which is an admin area you grant deliberately.

- **The person I want is not in the grid.**

Either they are an admin — listed at the foot of the page — or they have no sign-in. Add a sign-in for them on Employees first.

- **Can a user grant permissions to others?**

No. Only admins can open the Permissions page, and it cannot be granted.

- **Does taking away an area delete anything they did?**

No. Their invoices, vouchers and bookings stay exactly as they are. They simply cannot open that area any more.

Open by default where it is safe, locked where it matters

New staff are productive on day one, and your books, your phone lines and your settings stay with the people you chose. One page shows who can do what.

Two roles

Admin and user — nothing to learn.

Per person

Tick only the areas each one needs.

Immediate

Changes apply on the next click.

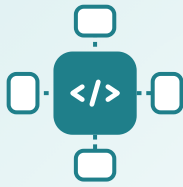
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Why Filantis

What to do next

If your people handle cash, set up their drawers: [Open, hand over and close a till](#).

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