What user roles are there?

Role	Description
Admin	Full access — can view and manage everything in the client portal.
Approver	Decision-maker for financial approvals; can approve or reject quotes.
Billing	Can view quotes, approve/reject quotes, and (coming soon) view and pay invoices.
End User (Tickets Only)	Standard end user; can see **their own** tickets and devices and submit new tickets.
Site Manager	Oversees a single location; has the same capabilities as an End User plus visibility over all items for that location.
VIP (Very Important Person)	Tag indicating the person is a high-priority contact.
Emergency	Designated emergency contact for critical issues.

What user roles should every client have?

Every client should designate at least:

- **Admin** – ensures someone has full control over the portal.
- **Emergency** – so we know who to contact for urgent issues.

All other roles are optional, but supplying them helps us tailor a more personal and efficient support experience.

Can portal users see everything?

No. Visibility is governed by **client boundaries** and **user roles**:

1. **Client boundary** – A user can never see information that belongs to another client. The portal's highest separation layer is the individual client record.
2. **Role-based scope within a client**
    - **Admin** – Full visibility of every asset, ticket, invoice, and quote for the entire client.
    - **Site Manager** – Sees all items (assets, tickets, etc.) tied to their assigned location, plus all End User capabilities.
    - **End User** – Sees only their own tickets, devices, and any assets explicitly assigned to them.
    - **Approver / Billing** – Primarily focused on financial items; can view and act on quotes (and invoices once enabled).
    - **VIP / Emergency** – These tags inherit the visibility of whichever primary role the user also holds (e.g., VIP + Admin).
3. **Tickets & comments** – Users only see ticket comments or attachments that are posted with **"Contact Everyone"** visibility.
4. **Internal-only data** – Technician notes and other internal fields remain hidden regardless of role.

We're gathering feedback on this visibility model during testing—please let us know if these boundaries don't meet your needs.

How do I give feedback? (including functional portal tests)

During the current testing phase:

- Open **Submit New Ticket** in the portal.
- Use the custom field **"Client Portal Feedback"** to log your comments, bug reports, or functional-testing results.
- Attach screenshots or steps-to-reproduce in the ticket body if helpful.

> **Note:** This process may evolve when we enter the broader user-beta stage—keep an eye out for updated instructions.