Default permissions of team member roles

Altegio sets these permissions when you select a role in **Team > Team members list > team member > Access**. You can change any permission before you click **Save**. Updated: November 2026.

✓ permission is on ✗ permission is off, its permission group is off, or the role does not have this permission **5 of 8** permission group is on, 5 of its 8 permissions are selected
Blue text default value of a drop-down list *Italic* setting without its own caption in the permissions window ↳ nested permission

Permission	System manager	Viewer	Professional	Receptionist	Call center	Accountant	Manager	Owner
Counted in the subscription	**No**	**No**	**Yes**	**Yes**	**Yes**	**Yes**	**Yes**	**Yes**
Appointment Calendar	**5 of 8**	**5 of 8**	**3 of 8**	**8 of 8**	**7 of 8**	✗	**8 of 8**	**8 of 8**
View schedule and bookings of positions	All positions	All positions	All positions	All positions	All positions	✗	All positions	All positions
View schedule and appointments of team members	Of all team members	Of all team members	Of all team members	Of all team members	Of all team members	✗	Of all team members	Of all team members
Limit access to history of schedule and appointments	Do not limit	Do not limit	Restrict previous days	Do not limit	Do not limit	✗	Do not limit	Do not limit
Change team member's work schedule and appointment time in the Appointment Calendar	✗	✗	✗	✓	✗	✗	✓	✓
Show phone number	✓	✓	✗	✓	✓	✗	✓	✓
Reschedule appointment	✗	✗	✗	✓	✓	✗	✓	✓
Show statistics	✓	✓	✗	✓	✓	✗	✓	✓
Show waiting list	✗	✗	✗	✓	✓	✗	✓	✓
Appointment window	**5 of 27**	**5 of 27**	**0 of 31**	**28 of 31**	**24 of 31**	✗	**28 of 31**	**31 of 31**
Add, edit and delete assistants	✗	✗	✗	✓	✗	✗	✓	✓
Edit assistant compensation share	✗	✗	✗	✓	✗	✗	✓	✓
Access to the clients' data (Including phone number)	✓	✓	✗	✓	✓	✗	✓	✓
Access to create new clients in the appointment	✗	✗	✗	✓	✓	✗	✓	✓
Access to drop-down list with client data	✓	✓	✗	✓	✓	✗	✓	✓
↳ Show phone number	✓	✓	✗	✓	✓	✗	✓	✓
View appointment custom fields	✓	✓	✗	✓	✓	✗	✓	✓
Create appointments	✗	✗	✗	✓	✓	✗	✗	✓
Change appointments	✗	✗	✗	✓	✓	✗	✓	✓
↳ *Period*	✗	✗	✗	Do not limit	Do not limit	✗	Do not limit	Do not limit
↳ Change appointments with the "Arrived" status	✗	✗	✗	✓	✓	✗	✓	✓
↳ Access to edit paid bookings in the "Arrived" status	✗	✗	✗	✓	✓	✗	✓	✓
↳ Access to edit paid appointments in the "Confirmed" status	✗	✗	✗	✓	✓	✗	✓	✓
↳ Change the cost of services	✗	✗	✗	✓	✓	✗	✓	✓
↳ Change the discount for services	✗	✗	✗	✓	✓	✗	✓	✓
↳ Change appointment custom fields	✗	✗	✗	✓	✓	✗	✓	✓
↳ Change team member and appointment time	✗	✗	✗	✓	✓	✗	✓	✓
↳ Change duration	✗	✗	✗	✓	✓	✗	✓	✓
↳ Change comment	✗	✗	✗	✓	✓	✗	✓	✓
↳ Change services	✗	✗	✗	✓	✓	✗	✓	✓

Permission	System manager	Viewer	Professional	Receptionist	Call center	Accountant	Manager	Owner
Delete bookings	✗	✗	✗	✗	✗	✗	✓	✓
↳ Delete appointments with the "Arrived" status	✗	✗	✗	✗	✗	✗	✓	✓
↳ Delete paid appointments	✗	✗	✗	✗	✗	✗	✓	✓
Sell products	✗	✗	✗	✓	✓	✗	✓	✓
↳ Create product transactions	✗	✗	✗	✓	✓	✗	✓	✓
↳ *Period*	✗	✗	✗	Do not limit	Do not limit	✗	Do not limit	Do not limit
↳ Edit transactions for products	✗	✗	✗	✓	✓	✗	✓	✓
↳ *Period*	✗	✗	✗	Do not limit	Do not limit	✗	Do not limit	Do not limit
↳ Change the cost of products	✗	✗	✗	✓	✓	✗	✓	✓
↳ Change the discount for products	✗	✗	✗	✓	✓	✗	✓	✓
Process the payment	✗	✗	✗	✓	✗	✗	✗	✓
↳ *Period*	✗	✗	✗	Do not limit	✗	✗	✗	Do not limit
↳ Make a payment from the client's personal account	✗	✗	✗	✓	✗	✗	✗	✓
Edit consumables	✗	✗	✗	✓	✓	✗	✓	✓
Client data access throughout a chain	✓	✓	✗	✓	✓	✗	✓	✓
Finance	**20 of 36**	**9 of 36**	**2 of 38**	**6 of 38**	**5 of 38**	**28 of 38**	**36 of 38**	**36 of 38**
Cash registers	Access to all cash registers	Access to all cash registers	Access to all cash registers	Access to all cash registers	Access to all cash registers	Access to all cash registers	Access to all cash registers	Access to all cash registers
View the cash flow	✓	✓	✗	✓	✓	✓	✓	✓
↳ *Period*	Do not limit	Do not limit	✗	Do not limit	Do not limit	Do not limit	Do not limit	Do not limit
↳ Create transactions	✗	✗	✗	✓	✓	✓	✓	✓
↳ *Period*	✗	✗	✗	Restrict previous days	Restrict previous days	Do not limit	Do not limit	Do not limit
↳ Edit transactions	✗	✗	✗	✓	✓	✓	✓	✓
↳ *Period*	✗	✗	✗	Restrict previous days	Restrict previous days	Do not limit	Do not limit	Do not limit
↳ Delete transactions	✗	✗	✗	✗	✗	✓	✓	✓
↳ Export the cash flow to Excel	✓	✗	✗	✗	✗	✓	✓	✓
↳ *Transaction types*	Access to all types of transactions	Access to all types of transactions	✗	Access to all types of transactions	Access to all types of transactions	Access to all types of transactions	Access to all types of transactions	Access to all types of transactions
Access to accounts and cash register	✓	✓	✗	✗	✗	✓	✓	✓
↳ Access to balance	✓	✓	✗	✗	✗	✓	✓	✓
Access to counterparties	✓	✓	✗	✗	✗	✓	✓	✓
↳ Access to creation	✗	✗	✗	✗	✗	✓	✓	✓
↳ Access to editing	✗	✗	✗	✗	✗	✓	✓	✓
↳ Access to removal	✗	✗	✗	✗	✗	✓	✓	✓
↳ Access to download to Excel	✓	✗	✗	✗	✗	✓	✓	✓
Access to the payment category	✓	✓	✗	✗	✗	✓	✓	✓
↳ Access to creation	✗	✗	✗	✗	✗	✓	✓	✓
↳ Access to editing	✗	✗	✗	✗	✗	✓	✓	✓

Permission	System manager	Viewer	Professional	Receptionist	Call center	Accountant	Manager	Owner
↳ Access to removal	✗	✗	✗	✗	✗	✓	✓	✓
Operations with POS	✓	✗	✗	✗	✗	✓	✓	✓
POS settings	✓	✗	✗	✗	✗	✗	✓	✓
↳ Access to editing	✗	✗	✗	✗	✗	✗	✓	✓
Online payments	✓	✗	✗	✗	✗	✗	✓	✓
↳ Access to editing	✗	✗	✗	✗	✗	✗	✓	✓
Access to payment settings	✓	✗	✗	✗	✗	✗	✓	✓
↳ Access to editing	✗	✗	✗	✗	✗	✗	✓	✓
Access to payroll calculation schemes	✓	✗	✗	✗	✗	✓	✓	✓
Access to payroll calculation	✓	✗	✗	✗	✗	✓	✓	✓
↳ *Period*	Do not limit	✗	✗	✗	✗	Do not limit	Do not limit	Do not limit
↳ Access to payroll	✗	✗	✗	✗	✗	✓	✓	✓
↳ *Period*	✗	✗	✗	✗	✗	Do not limit	Do not limit	Do not limit
Access to a specific team member payroll calculation	✗	✗	✓	✗	✗	✗	✗	✗
↳ *Team member*	✗	✗	The invited team member	✗	✗	✗	✗	✗
↳ *Period*	✗	✗	Do not limit	✗	✗	✗	✗	✗
↳ Access to payroll	✗	✗	✗	✗	✗	✗	✗	✗
↳ *Period*	✗	✗	✗	✗	✗	✗	✗	✗
Access to the report for the period	✓	✓	✗	✗	✗	✓	✓	✓
↳ Permission to export the report for the period to Excel	✓	✗	✗	✗	✗	✓	✓	✓
Access to the annual report	✓	✓	✗	✗	✗	✓	✓	✓
↳ Permission to export the annual report to Excel	✓	✗	✗	✗	✗	✓	✓	✓
Access to receipt printing	✗	✗	✗	✓	✓	✓	✓	✓
Access to daily cashier report	✓	✓	✗	✗	✗	✓	✓	✓
↳ *Period*	Do not limit	Do not limit	✗	✗	✗	Do not limit	Do not limit	Do not limit
↳ Access to download to Excel	✓	✗	✗	✗	✗	✓	✓	✓
View payment policies	✗	✗	✗	✓	✗	✗	✓	✓
Manage payment policies	✗	✗	✗	✗	✗	✗	✓	✓
Products	**17 of 39**	**10 of 39**	✗	**26 of 39**	**26 of 39**	**39 of 39**	**39 of 39**	**39 of 39**
Storage locations	Access to all storage locations	Access to all storage locations	✗	Access to all storage locations	Access to all storage locations	Access to all storage locations	Access to all storage locations	Access to all storage locations
View the prime cost of products and consumables	✓	✓	✗	✓	✓	✓	✓	✓
View product movements	✓	✓	✗	✓	✓	✓	✓	✓
↳ *Period*	Do not limit	Do not limit	✗	Do not limit	Do not limit	Do not limit	Do not limit	Do not limit
↳ Transfer products between inventories	✗	✗	✗	✓	✓	✓	✓	✓
↳ Create product transactions	✗	✗	✗	✓	✓	✓	✓	✓
↳ *Period*	✗	✗	✗	Do not limit	Do not limit	Do not limit	Do not limit	Do not limit
↳ Record product receipts	✗	✗	✗	✓	✓	✓	✓	✓

Permission	System manager	Viewer	Professional	Receptionist	Call center	Accountant	Manager	Owner
↳ Record product sales	✗	✗	✗	✓	✓	✓	✓	✓
↳ Edit transactions for products	✗	✗	✗	✓	✓	✓	✓	✓
↳ *Period*	✗	✗	✗	Do not limit	Do not limit	Do not limit	Do not limit	Do not limit
↳ Record product receipts	✗	✗	✗	✓	✓	✓	✓	✓
↳ Record product sales	✗	✗	✗	✓	✓	✓	✓	✓
↳ Delete transactions for products	✗	✗	✗	✗	✗	✓	✓	✓
↳ Permission to download product movements to Excel	✓	✗	✗	✗	✗	✓	✓	✓
↳ *Product transaction types*	Access to all types of transactions	Access to all types of transactions	✗	Access to all types of transactions	Access to all types of transactions	Access to all types of transactions	Access to all types of transactions	Access to all types of transactions
↳ Access to inventory control	✓	✓	✗	✓	✓	✓	✓	✓
↳ Access to create and edit inventory	✗	✗	✗	✓	✓	✓	✓	✓
↳ Access to delete inventory	✗	✗	✗	✗	✗	✓	✓	✓
↳ Permission to download stocktakes to Excel	✓	✗	✗	✓	✓	✓	✓	✓
↳ Access to the stock on hand report	✓	✓	✗	✗	✗	✓	✓	✓
↳ Permission to download stock on hand to Excel	✓	✗	✗	✗	✗	✓	✓	✓
↳ Access to the sales report	✓	✓	✗	✗	✗	✓	✓	✓
↳ Permission to download the sales report to Excel	✓	✗	✗	✗	✗	✓	✓	✓
↳ Access to the consumables write-off report	✓	✓	✗	✗	✗	✓	✓	✓
↳ Permission to download the consumables write-off report to Excel	✓	✗	✗	✗	✗	✓	✓	✓
↳ Access to the product write-offs report	✓	✓	✗	✗	✗	✓	✓	✓
↳ Permission to download the product write-offs report to Excel	✓	✗	✗	✗	✗	✓	✓	✓
↳ Access to turnover report	✓	✓	✗	✗	✗	✓	✓	✓
↳ Permission to download the turnover report to Excel	✓	✗	✗	✗	✗	✓	✓	✓
↳ Access to product management	✓	✓	✗	✓	✓	✓	✓	✓
↳ Access to creating products	✗	✗	✗	✓	✓	✓	✓	✓
↳ Access to editing products	✗	✗	✗	✓	✓	✓	✓	✓
↳ Name, SKU, Barcode	✗	✗	✗	✓	✓	✓	✓	✓
↳ Category	✗	✗	✗	✓	✓	✓	✓	✓
↳ Price	✗	✗	✗	✓	✓	✓	✓	✓
↳ Prime cost	✗	✗	✗	✓	✓	✓	✓	✓
↳ Units	✗	✗	✗	✓	✓	✓	✓	✓
↳ Critical stock level, Desired stock level	✗	✗	✗	✓	✓	✓	✓	✓
↳ Weight	✗	✗	✗	✓	✓	✓	✓	✓
↳ Comment	✗	✗	✗	✓	✓	✓	✓	✓
↳ Access to archiving and restoring products	✗	✗	✗	✓	✓	✓	✓	✓
↳ Access to deleting products	✗	✗	✗	✓	✓	✓	✓	✓
Team	**7 of 8**	✗	✗	✗	✗	✗	**8 of 8**	**8 of 8**

Permission	System manager	Viewer	Professional	Receptionist	Call center	Accountant	Manager	Owner
Create team members	✓	✗	✗	✗	✗	✗	✓	✓
Edit team members	✓	✗	✗	✗	✗	✗	✓	✓
Delete team members	✓	✗	✗	✗	✗	✗	✓	✓
Dismiss team members	✓	✗	✗	✗	✗	✗	✓	✓
Access to Positions section	✓	✗	✗	✗	✗	✗	✓	✓
↳ Create positions	✓	✗	✗	✗	✗	✗	✓	✓
↳ Remove positions	✓	✗	✗	✗	✗	✗	✓	✓
Edit work schedule	✗	✗	✗	✗	✗	✗	✓	✓
Services	**0 of 12**	✗	✗	✗	✗	✗	**12 of 12**	**12 of 12**
Create services	✗	✗	✗	✗	✗	✗	✓	✓
Edit services	✗	✗	✗	✗	✗	✗	✓	✓
↳ The name of service and Name for online booking	✗	✗	✗	✗	✗	✗	✓	✓
↳ Service category	✗	✗	✗	✗	✗	✗	✓	✓
↳ Service price	✗	✗	✗	✗	✗	✗	✓	✓
↳ Uploading and changing images	✗	✗	✗	✗	✗	✗	✓	✓
↳ Displaying the service in the booking widget	✗	✗	✗	✗	✗	✗	✓	✓
↳ Online payment for the service	✗	✗	✗	✗	✗	✗	✓	✓
↳ Service resources	✗	✗	✗	✗	✗	✗	✓	✓
Change team members' services and their duration	✗	✗	✗	✗	✗	✗	✓	✓
Modify bills of materials	✗	✗	✗	✗	✗	✗	✓	✓
Delete services	✗	✗	✗	✗	✗	✗	✓	✓
Notifications	**2 of 2**	✗	✗	✗	✗	✗	**2 of 2**	**2 of 2**
Access to the SMS Notifications section	✓	✗	✗	✗	✗	✗	✓	✓
Access to the Email Notifications section	✓	✗	✗	✗	✗	✗	✓	✓
Settings	**6 of 10**	✗	✗	**0 of 10**	**0 of 10**	✗	**8 of 10**	**10 of 10**
Access to system settings	✓	✗	✗	✗	✗	✗	✓	✓
Access to location settings	✓	✗	✗	✗	✗	✗	✓	✓
Manage users	✓	✗	✗	✗	✗	✗	✓	✓
↳ Remove users	✓	✗	✗	✗	✗	✗	✓	✓
↳ Invite users to manage a location	✓	✗	✗	✗	✗	✗	✓	✓
↳ Configure user notifications	✗	✗	✗	✗	✗	✗	✓	✓
↳ Manage user rights	✓	✗	✗	✗	✗	✗	✓	✓
↳ *Scope of rights*	Manage all rights	✗	✗	✗	✗	✗	Manage rights within your rights set	Manage all rights
Change Webhook settings	✗	✗	✗	✗	✗	✗	✗	✓
Change settings for receiving payment documents	✗	✗	✗	✗	✗	✗	✗	✓
Set up the list of client categories	✗	✗	✗	✗	✗	✗	✓	✓
All clients	**10 of 26**	**10 of 26**	✗	**18 of 26**	**18 of 26**	✗	**24 of 26**	**26 of 26**

Permission	System manager	Viewer	Professional	Receptionist	Call center	Accountant	Manager	Owner
Show phone numbers and email in client list	✗	✗	✗	✓	✓	✗	✓	✓
Show the phone number and email in the client's card	✗	✗	✗	✓	✓	✗	✓	✓
View client last name and middle name	✓	✓	✗	✓	✓	✗	✓	✓
↳ Edit client last name and middle name	✗	✗	✗	✓	✓	✗	✓	✓
Edit client data in client's card	✗	✗	✗	✓	✓	✗	✓	✓
View client loyalty list	✓	✓	✗	✓	✓	✗	✓	✓
View client card comment	✓	✓	✗	✓	✓	✗	✓	✓
↳ Edit client card comment	✗	✗	✗	✓	✓	✗	✓	✓
Delete clients	✗	✗	✗	✗	✗	✗	✗	✓
Export the client list	✗	✗	✗	✗	✗	✗	✗	✓
View comments	✓	✓	✗	✓	✓	✗	✓	✓
Add comments	✗	✗	✗	✓	✓	✗	✓	✓
Delete your own comments	✗	✗	✗	✗	✗	✗	✓	✓
Delete others' comments	✗	✗	✗	✗	✗	✗	✓	✓
View and download files	✓	✓	✗	✗	✗	✗	✓	✓
↳ Upload files	✗	✗	✗	✗	✗	✗	✓	✓
↳ Delete files	✗	✗	✗	✗	✗	✗	✓	✓
View client custom fields	✓	✓	✗	✓	✓	✗	✓	✓
↳ Edit client custom fields	✗	✗	✗	✓	✓	✗	✓	✓
Show the clients	Of all team members	Of all team members	✗	Of all team members	Of all team members	✗	Of all team members	Of all team members
View client visit history	✓	✓	✗	✓	✓	✗	✓	✓
Accounts	✓	✓	✗	✓	✓	✗	✓	✓
↳ Open an account	✗	✗	✗	✓	✓	✗	✓	✓
↳ Replenish account	✗	✗	✗	✓	✓	✗	✓	✓
↳ View account transaction history	✓	✓	✗	✓	✓	✗	✓	✓
Set up loyalty programs	✗	✗	✗	✗	✗	✗	✓	✓
Reports	**24 of 25**	**21 of 25**	✗	**6 of 25**	✗	✗	**25 of 25**	**25 of 25**
Main dashboard	✓	✓	✗	✗	✗	✗	✓	✓
View the list of bookings	✓	✓	✗	✓	✗	✗	✓	✓
↳ *Period*	Do not limit	Do not limit	✗	Do not limit	✗	✗	Do not limit	Do not limit
↳ Export the list of bookings to Excel	✓	✗	✗	✓	✗	✗	✓	✓
↳ Show phone numbers in bookings	✓	✓	✗	✓	✗	✗	✓	✓
Events	✓	✓	✗	✓	✗	✗	✓	✓
Visits	✓	✓	✗	✓	✗	✗	✓	✓
↳ Show phone numbers in the summary	✓	✓	✗	✓	✗	✗	✓	✓
Return rate	✓	✓	✗	✗	✗	✗	✓	✓
Team members workload	✓	✓	✗	✗	✗	✗	✓	✓
Receptionist analytics	✓	✓	✗	✗	✗	✗	✓	✓

Permission	System manager	Viewer	Professional	Receptionist	Call center	Accountant	Manager	Owner
Sales by team members	✓	✓	✗	✗	✗	✗	✓	✓
Sales by team member over time	✓	✓	✗	✗	✗	✗	✓	✓
Sales by services	✓	✓	✗	✗	✗	✗	✓	✓
Sales by clients	✓	✓	✗	✗	✗	✗	✓	✓
Promotions	✓	✓	✗	✗	✗	✗	✓	✓
View reviews	✓	✓	✗	✗	✗	✗	✓	✓
↳ Delete reviews	✗	✗	✗	✗	✗	✗	✓	✓
View the details of messages	✓	✓	✗	✗	✗	✗	✓	✓
↳ Export the details of messages to Excel	✓	✗	✗	✗	✗	✗	✓	✓
↳ Show phone numbers in messages	✓	✓	✗	✗	✗	✗	✓	✓
Calls	✓	✓	✗	✗	✗	✗	✓	✓
↳ Export calls to Excel	✓	✗	✗	✗	✗	✗	✓	✓
↳ Show phone numbers in calls	✓	✓	✗	✗	✗	✗	✓	✓
Data exports	✓	✓	✗	✗	✗	✗	✓	✓
Data changes	✓	✓	✗	✗	✗	✗	✓	✓
Loyalty	**1 of 8**	**1 of 8**	✗	**4 of 8**	**4 of 8**	✗	**8 of 8**	**8 of 8**
Issuance and removal of client loyalty cards	✗	✗	✗	✓	✓	✗	✓	✓
Manual credit/debit of loyalty cards	✗	✗	✗	✓	✓	✗	✓	✓
Membership balance editing	✗	✗	✗	✗	✗	✗	✓	✓
Membership validity editing	✗	✗	✗	✗	✗	✗	✓	✓
View membership history	✓	✓	✗	✓	✓	✗	✓	✓
Editing the balance of gift cards	✗	✗	✗	✗	✗	✗	✓	✓
Editing the expiration date of gift cards	✗	✗	✗	✗	✗	✗	✓	✓
Purchase with gift card and membership without code	✗	✗	✗	✓	✓	✗	✓	✓
Billing	**1 of 1**	✗	✗	✗	✗	**1 of 1**	**0 of 1**	**1 of 1**
Access to the Billing section	✓	✗	✗	✗	✗	✓	✗	✓
Online booking	**0 of 1**	✗	✗	✗	✗	✗	**1 of 1**	**1 of 1**
Manage processing of personal data	✗	✗	✗	✗	✗	✗	✓	✓
Allow access to the location only from IP addresses (v4, v6)	✗	✗	✗	✗	✗	✗	✗	✗
Resources	✓	✓	✗	✗	✗	✗	✓	✓
Send bulk SMS to clients	✗	✗	✗	✗	✗	✗	✓	✓
Add locations to the chain	✗	✗	✗	✗	✗	✗	✓	✓

Allow access to the location only from IP addresses (v4, v6) restricts access instead of granting it. When you turn it on, a field for the allowed IP addresses appears below it. In every role this permission is off by default, so there is no IP address restriction.