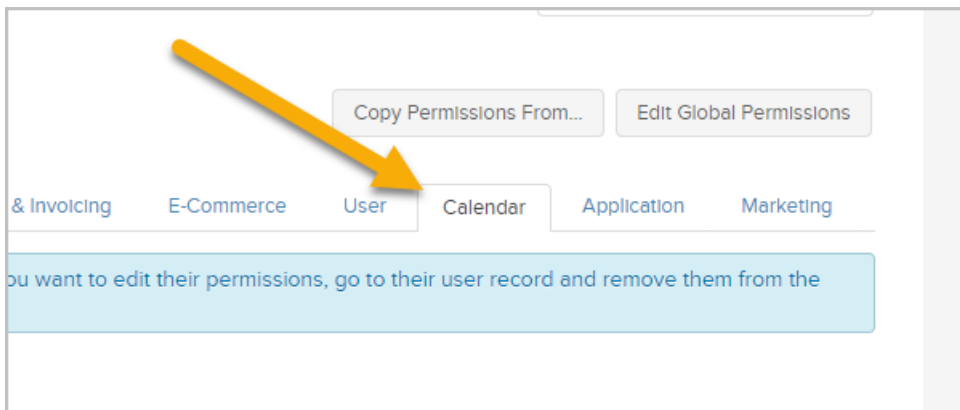


User Permissions - Calendar

The Calendar permissions determine the ability to view and use the Infusionsoft calendaring tools to schedule appointments and create tasks. An admin can change these permissions by going to **Admin > Users** and clicking the **Edit Permissions** link next to the user name.

Task / Appointments / Note



These permissions control the ability to view, add, edit and delete tasks, appointments and notes.

- **Can view all records:** This permission controls the ability to view the tasks, appointments, and notes assigned to other users. If it is set to *No*, the user can only see the summary view of the tasks, appointments, or notes assigned to others. They will receive an *access denied* message if they click on the link to view the details.
- **Can edit all records:** This permission controls the ability to update the tasks, appointments, and notes assigned to other users. If it is set to *No*, the user can click on the detail link to view additional information, but will not see the *Save* button. If the *can delete permission* is set to *Yes*, the user will still be able to delete items assigned to other users. If the *can add permission* is set to *Yes*, the user will still be able to add a new task, appointment or note for another user, but will not be able to edit it after saving it the first time.
- **Can add:** This permission controls the ability to create new tasks, appointments, or notes. If it is set to *No*, the user will not see the option to add these items or will receive an *access denied* message when trying to create one of them through the calendar screen.
- **Can search:** This permission controls the ability to view the general task list from the user toolbar. If it is set to *No*, the user will not see the *Task* menu option listed.
- **Can delete:** This permission controls the ability to delete tasks, appointments, and notes. If it is set to *No*, the user will not see the *Delete* option in the *Actions* drop down menu or the *Delete* button when viewing individual records.
- **Can assign tasks:** This permission controls the ability to assign a task, appointment, or note to other users. If it is set to *No*, the user can add and edit appointments, but cannot assign them to other users or reassign them after they are created.
- **Can view unassigned records:** This permission controls the ability to view tasks, appointments, and notes that are not assigned to any user. You may need to assign a user to monitor unassigned records. If it is set to *No*, the user will not be able to see the details for any unassigned items.
- **Can edit unassigned records:** This permission controls the ability to update tasks, appointments, and notes that are not assigned to any user. If it is set to *No*, the user will not be able to save changes to unassigned records; which

means they cannot assign a users to them.

Email

Can create shared POP accounts: This permission controls the ability to share a POP email account. If it is set to *No*, the user can set up a new POP account but cannot share it with other users. The list of users will be hidden from view.

Calendar

Can view calendar for {user}: This permission restricts the ability to view another user's calendar. It is also a necessary setting in order to view another user's Tasks. If it is set to *No*, the user will not be able to view the calendar for the specified user. There is a permission for each user. If the permission is set to *Yes*, the user will be able to select and view that user's Infusionsoft calendar.

Pro Tip! To see other Users **Tasks/Calendar** you must also go to "**Application Tab**" and change "**Can see other Users**" to "**yes**", if it's not already indicated.

