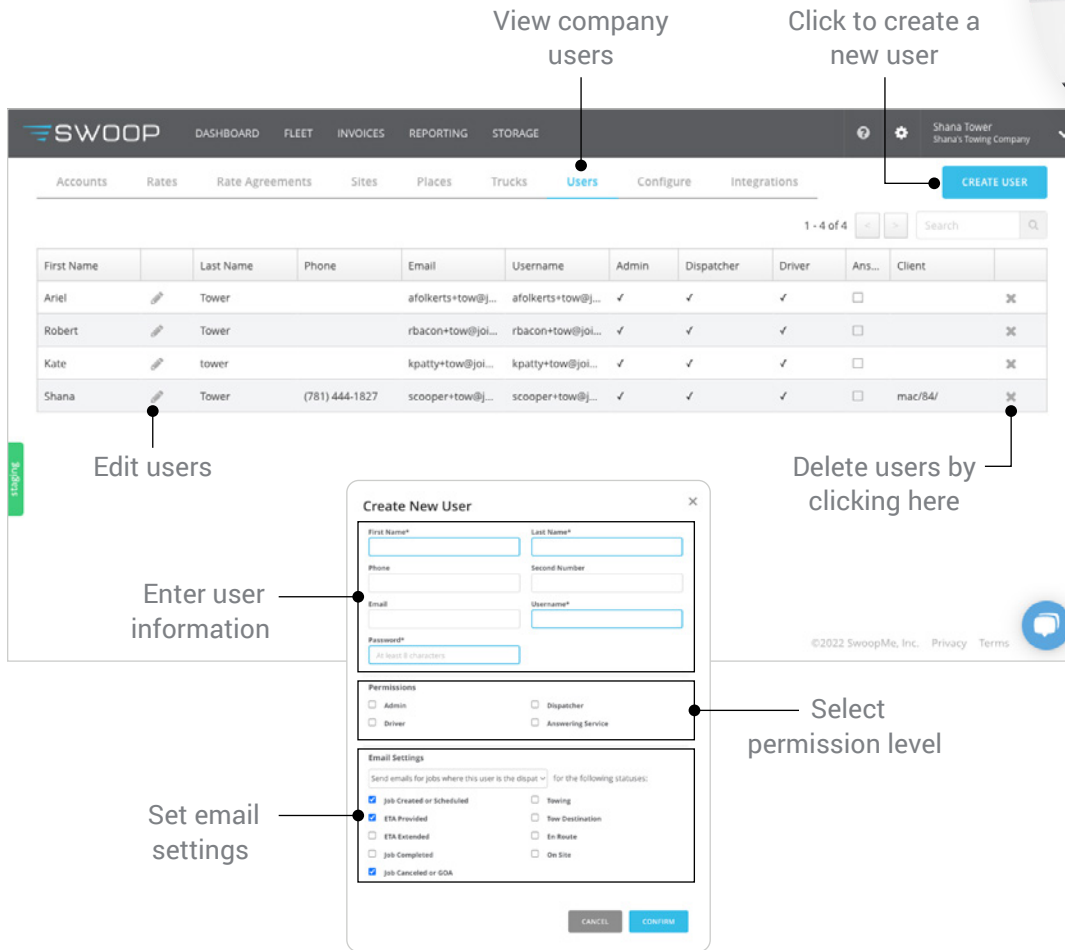Agero.
Powered by SWOOP®

User Management on Swoop

QUICK START GUIDE
Everything you need to empower your team at your fingertips

Settings Overview

View company users

Click to create a new user

Edit users

Delete users by clicking here

Enter user information

Select permission level

Set email settings

Benefits

Grow with your business
Easily scaled so ready to support both the big and small.

Work the way you want to
The tools you need whether you are in the office or on the road.

Integrate with your systems
Seamlessly integrates with your existing software or use ours to support your business.

Best choice for drivers
All the details, notifications and automation to support your team.

Types of Users

ADMIN - Admin users have full access to your company settings including user creation, site creation, configuration, reporting and integrations. They can also create and monitor jobs.
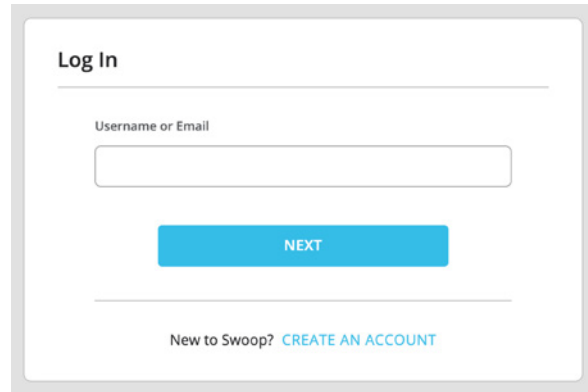
DISPATCHER - Dispatchers can create and monitor jobs for sites they are associated with.

DRIVERS - Drivers can be assigned and update jobs. Drivers do not have access to create jobs or adjust company settings.

Setting Up a New User

1 Log into Swoop as an Admin User

Log In

Username or Email

[   ]

NEXT

New to Swoop? CREATE AN ACCOUNT

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2 Click on the settings icon in the upper right corner

⚙

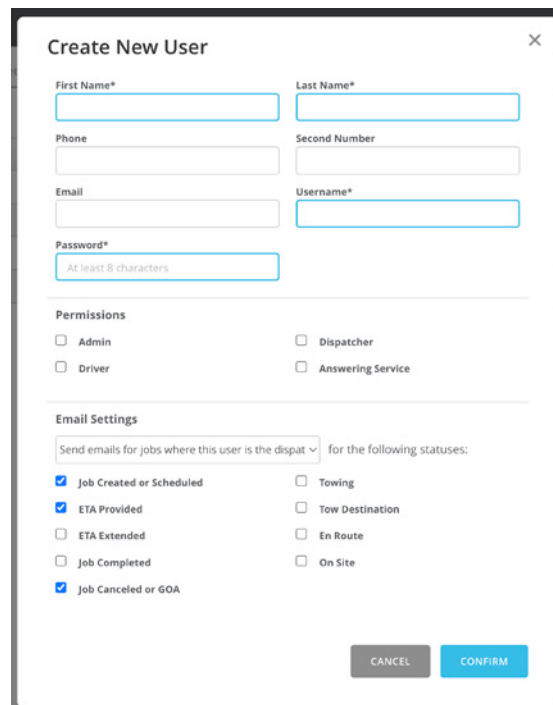**3** Select the Users tab from the settings menu

...aces   **Users**   Config...

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4 Click on Create User

Create User

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5 **ENTER THE FOLLOWING FIELDS**

+ First Name

+ Last Name

+ Phone

+ Email

+ Copy Email to Username Field

+ Select Permission: Admin, Dispatch or Driver

Create New User   ×

First Name*   Last Name*
[   ]   [   ]

Phone   Second Number
[   ]   [   ]

Email   Username*
[   ]   [   ]

Password*
[At least 8 characters]

Permissions

☐ Admin   ☐ Dispatcher
☐ Driver   ☐ Answering Service

Email Settings

[Send emails for jobs where this user is the dispat ∨] for the following statuses:

☑ Job Created or Scheduled   ☐ Towing
☑ ETA Provided   ☐ Tow Destination
☐ ETA Extended   ☐ En Route
☐ Job Completed   ☐ On Site
☑ Job Canceled or GOA

CANCEL   CONFIRM

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6 Enter a temporary password

Password*

[At least 8 characters]

NOTE: It is important to enter a cell phone number for your drivers. Phone calls and text messages will be sent to the driver when jobs are assigned to them.

Editing a User

1 Select the Users tab from the settings menu

aces   **Users**   Config

2 Click on the pencil icon to edit a user

3 Edit any of the fields. Click Confirm to save your changes

REPORTING   STORAGE

Edit User   ✕

First Name*
Shana

Last Name*
Tower

Phone
(781) 444-1827

Second Number
(781) 444-1827

Email*
scooper+tow@joinswoop.com

Username*
scooper+tow@joinswoop.com

New Password
At least 8 characters

Permissions

☑ Admin ☑ Dispatcher
☑ Driver ☐ Answering Service

Notifications

New job assigned to Shana's Towing Company   Text ▼
ETA submission accepted   Text ▼
Job dispatched to me   Text ▼

Email Settings

Send emails for jobs where Shana is the dispatch ▼   for the following statuses:

☑ Job Created or Scheduled ☐ Towing
☑ ETA Provided ☐ Tow Destination
☐ ETA Extended ☐ En Route
☐ Job Completed ☐ On Site
☑ Job Canceled or GOA

CANCEL   CONFIRM

Deleting a User

1 Select the Users tab from the settings menu

aces   **Users**   Config

2 Click on the X icon next to the user you would like to delete

3 You will be asked to confirm this action. Select Delete to confirm.

Delete User   ✕

Are you sure you want to delete this user?

Cancel   Delete