Users and Billing

Only admins can access the manage organization tab under the profile icon on the top right of the screen. For admins, they can click manage organization, and click the three lines in the top left to access users. Here they can click the +new button and add a new user. If the user is a client manager, their default permissions will be to have no access to payments or forms, but you can change that by editing client manager role permissions. Full users do not have access to manage organization but they can do everything else. NOTE before adding a new user you must update your subscriptions (only admins can do this). Your subscription information is in the billing section of manage organization. When you click on the billing tab and click update plan to select how many users and which type you would like to add. At the bottom you can access your customer portal where you can login with your email to pay your sobriety hub subscription. NOTE the customer portal is different from the payment portal, customer portal is for your subscription to Sobriety Hub while the payment portal is for your residents payments to you. Back in the manage organization page you can click on payouts to see all payouts earned on Sobriety hub. Remember, available funds are automatically paid out weekly on Fridays to your bank account. It typically takes until Sunday to reach your account.

Q: Who can access the Manage Organization tab?
A: Only admins can access the Manage Organization tab under the profile icon on the top right of the screen.

Q: How can admins add a new user?
A: Admins can click "Manage Organization" and then click the three lines in the top left to access Users. From there, they can click the "+New" button and add a new user.

Q: how can i customize user permissions
A: when adding a new user, you can choose to customize their permissions and select which permissions you would like them to have. You can do this by going into the manage organization tab under your profile and clicking roles. Click the role you would like to customize and click manage. Here you can customize the role. You can also create new roles at the top by clicking the plus button.

Q: What are the default permissions for a client manager?
A: If the user is a client manager, their default permissions are to have no access to payments or forms. However, you can change this by editing the client manager role permissions.

Q: Do full users have access to Manage Organization?
A: No, full users do not have access to Manage Organization, but they can do everything else.

Q: What must be done before adding a new user?
A: Before adding a new user, you must update your subscription. Only admins can do this.

Q: Where can I find subscription information?
A: Your subscription information is in the Billing section of Manage Organization.

Q: How do I update my plan to add new users?
A: In the Billing tab, click "Update Plan" to select how many users and which type you would like to add.

Q: How do I pay for my Sobriety Hub subscription?
A: At the bottom of the Billing section, you can access your Customer Portal, where you can log in with your email to pay your Sobriety Hub subscription.

Q: What is the difference between the Customer Portal and the Payment Portal?
A: The Customer Portal is for your subscription to Sobriety Hub. The Payment Portal is for collecting payments from your residents.

Q: How can I view my payouts from Sobriety Hub?
A: In the Manage Organization page, you can click on "Payouts" to see all payouts earned on Sobriety Hub.

Q: When are funds paid out to my bank account?
A: Available funds are automatically paid out weekly on Fridays. It typically takes until Sunday to reach your bank account.

Users and Billing FAQ

Q: How do I invite a house user to access Sobriety Hub?
A: Click in the top right, click manage organization, and scroll down to users and roles. Custom Roles are a set of permissions for the user which allows you to restrict their access as much as you want. If you already have a role created for the user, then click the plus button to add a user. Make sure your subscription pays for enough users. If you don't have any additional seats for more users, you will have to scroll up and app them in the billing section. Please note that client manager users are pre-restricted users intended to be used for house leads.

Q: What parts of Sobriety Hub can a house manager access vs an admin?
A: By default managers only see Residents and Houses tabs and cannot access Payments, Cloud, Forms or Outcomes. Access can be controlled via user roles. Admin has full access by default. For managers, you can restrict access to payments and other areas in the Organization settings.

Q: How should house managers who are also residents be set up in the system?
A: For house managers who are also residents:
1. Have them complete the resident process first (application and intake forms)

2. Then add them as a house manager with appropriate access permissions
3. They can be given specific permissions like access to forms
4. When logged in as house manager, they will only see information for their assigned house

Q: How does customizing roles and permissions work?
A: An admin can access all permissions in Sobriety Hub. To add a new user, click on the profile icon on the top right and click manage organization. From there, the admin can click users, and click the plus button on the top right. This allows the admin to enter someone's email, and determine if they are a full user, a client manager, or an admin. Under role, you can select program director or full user. You can decide to customize their roles from here to determine what they can and cannot see.

Q: what are the different color codes between user types
A: Blue = admin user, purple = client manager, orange = program director/full user

Q: what are the default permissions for each user type
A: client manager = no access to payments or forms, but you can change that by editing client manager role permissions, full user = everything except for manage organization permissions, admin = everything including manage organization, only one person should have this role