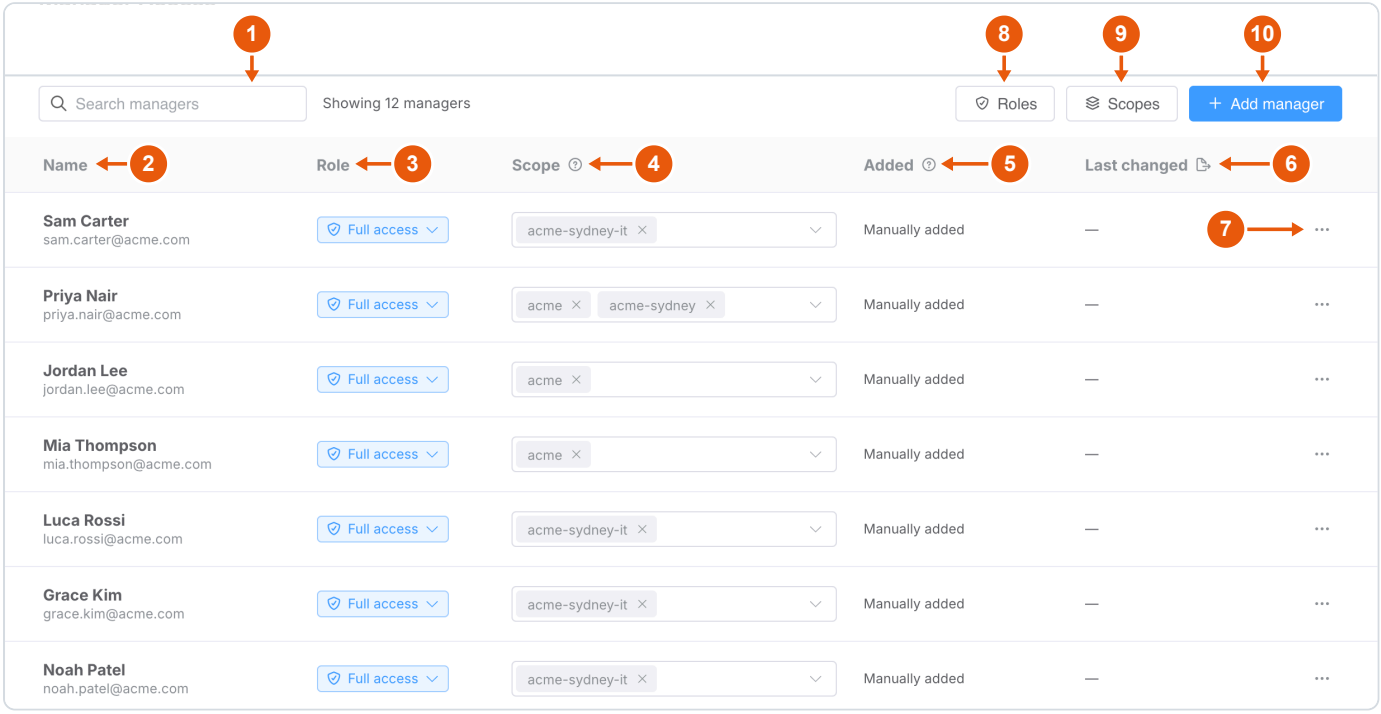
Manager Access: Quick Guide

Yellowbox Partner Dashboard, sidebar > **Manager Access**. Who can do what, and where.

> **Role** = *what* a manager can do: which dashboard pages they see and which actions they can take.

> **Scope** = *where* they can do it: which locations, bays and lockers they cover.

The managers table

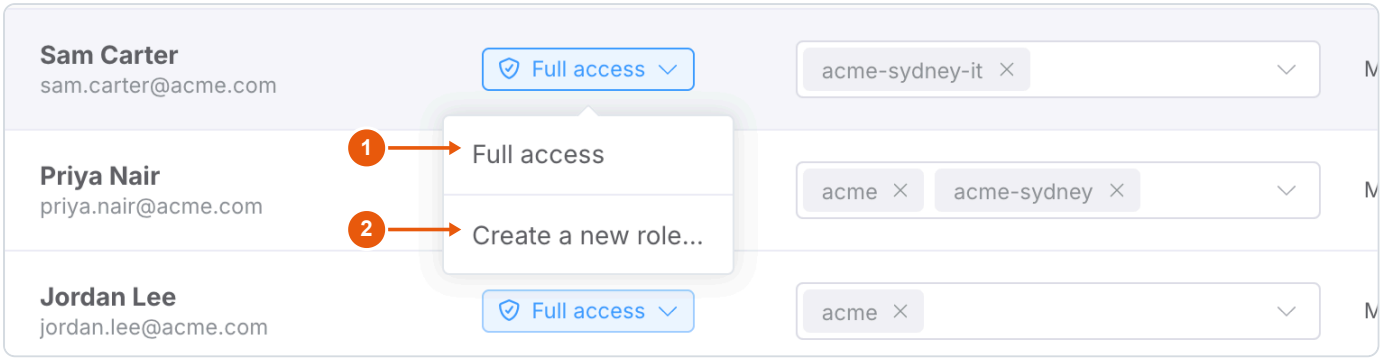


1. **Search** managers by name or email.
2. **Name**: the manager and their email.
3. **Role**: click to change it (see below).
4. **Scope**: click to add or remove the scopes they cover.
5. **Added**: who made them a manager. "Identity sync" means your own directory (for example Entra or Okta) did it.
6. **Last changed**: their latest change. The icon exports the full history as a CSV.
7. **··· menu**: *Remove manager access*. The person stays a user; they just stop being a manager.
8. **Roles**: create and edit roles.
9. **Scopes**: create and edit scopes.
10. **Add manager**: make an existing user a manager.

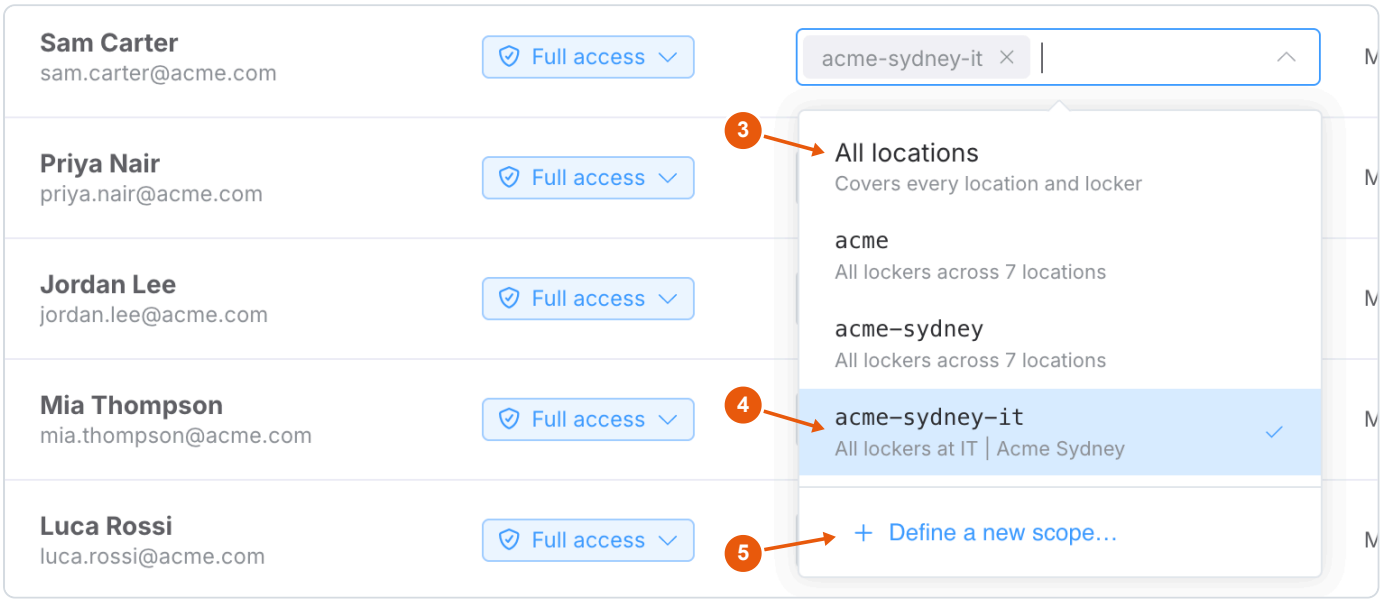
Who can use this page: organisation admins can do everything. Managers whose role includes *Manage roles* can change existing managers' roles and scopes, but cannot add or remove managers or change organisation admins. If you look after more than one organisation, pick one from the **Organisation** menu at the top right.

Change a manager's role or scope from the table

Changes made in the table save straight away.

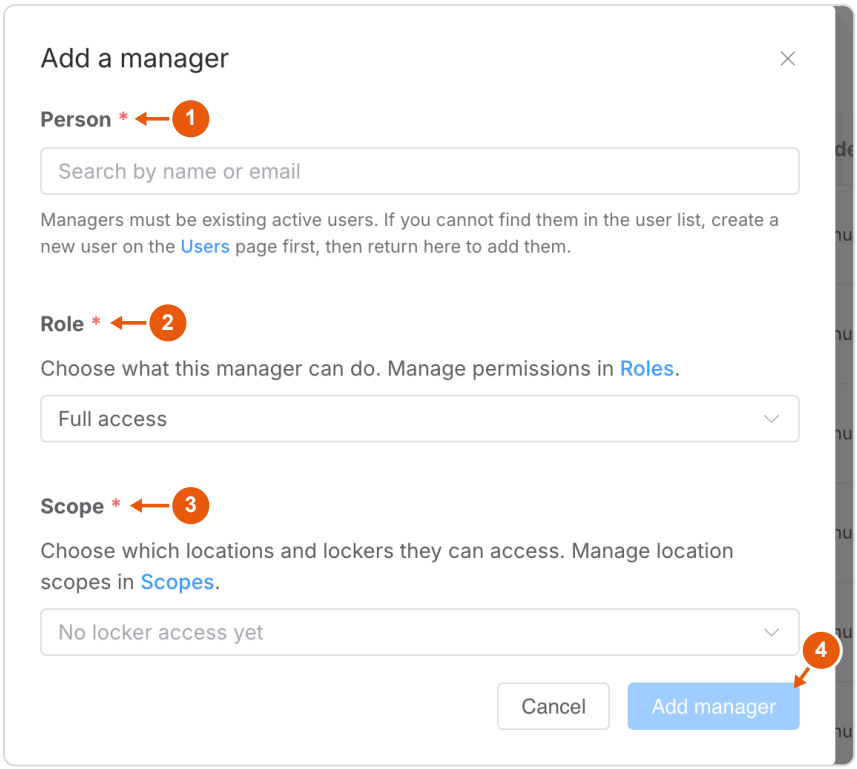


1. Pick a role. **Full access** is the built-in role with every permission.
2. **Create a new role…** opens the Roles window.



3. **All locations** covers every location and locker in the organisation.
4. Tick one or more named scopes. Each shows what it covers.
5. **Define a new scope…** opens the Scopes window.

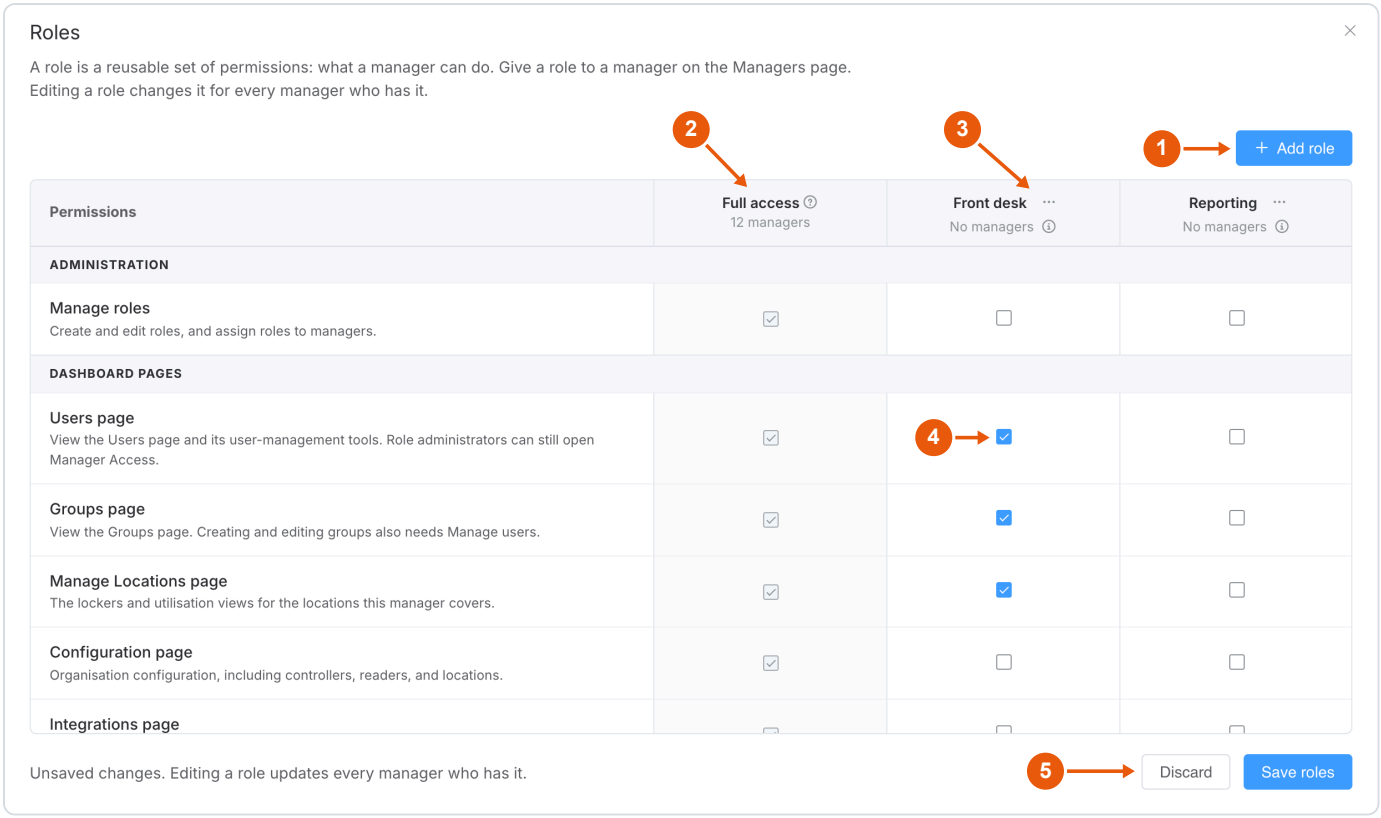
Add a manager



1. **Person**: search by name or email. They must already be an active user; if not, create them on the **Users** page first.
2. **Role**: Full access or one of your roles.
3. **Scope**: All locations or one or more scopes. Someone who was a manager before gets their old scopes pre-filled.
4. Click **Add manager**.

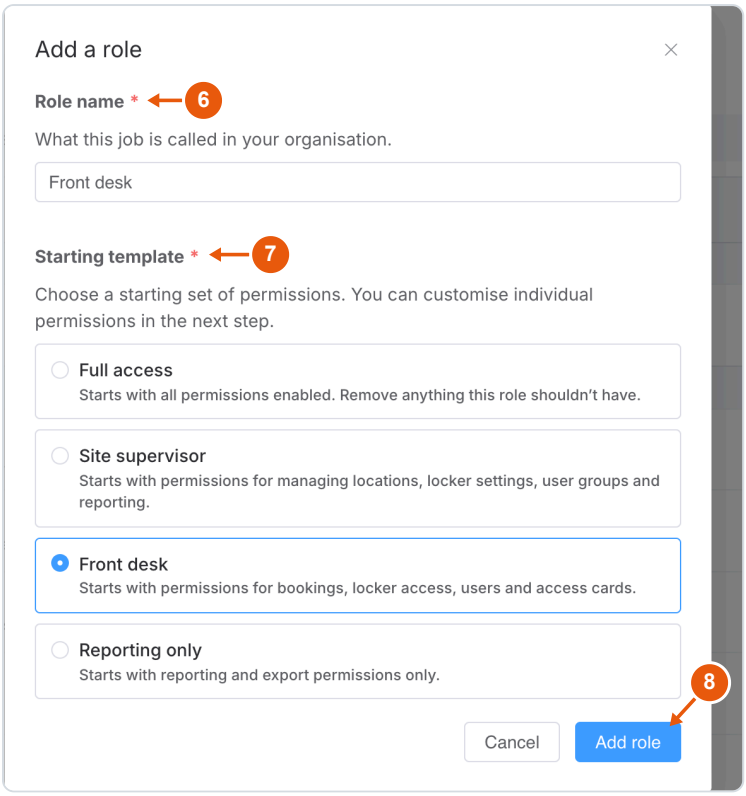
Roles

Click **Roles** on the toolbar. Each role is a column, so you can compare them at a glance. A manager with no role has **Full access** (still limited to their scope).



1. **Add role**: name it and pick a starting template (next picture).
2. **Full access**: the built-in baseline, for comparison.
3. **⋯ on a role**: Rename, Duplicate or Delete. Deleting a role that is in use asks what those managers get instead.
4. Tick or untick each permission. You can only grant permissions you hold yourself; the rest are locked.
5. Nothing is saved until you click **Save roles** (or **Discard**). Editing a role changes it for every manager who has it.

Add a role



6 **Role name**, for example "Front desk".

7 **Starting template**: Full access, Site supervisor, Front desk or Reporting only. You can change any permission afterwards.

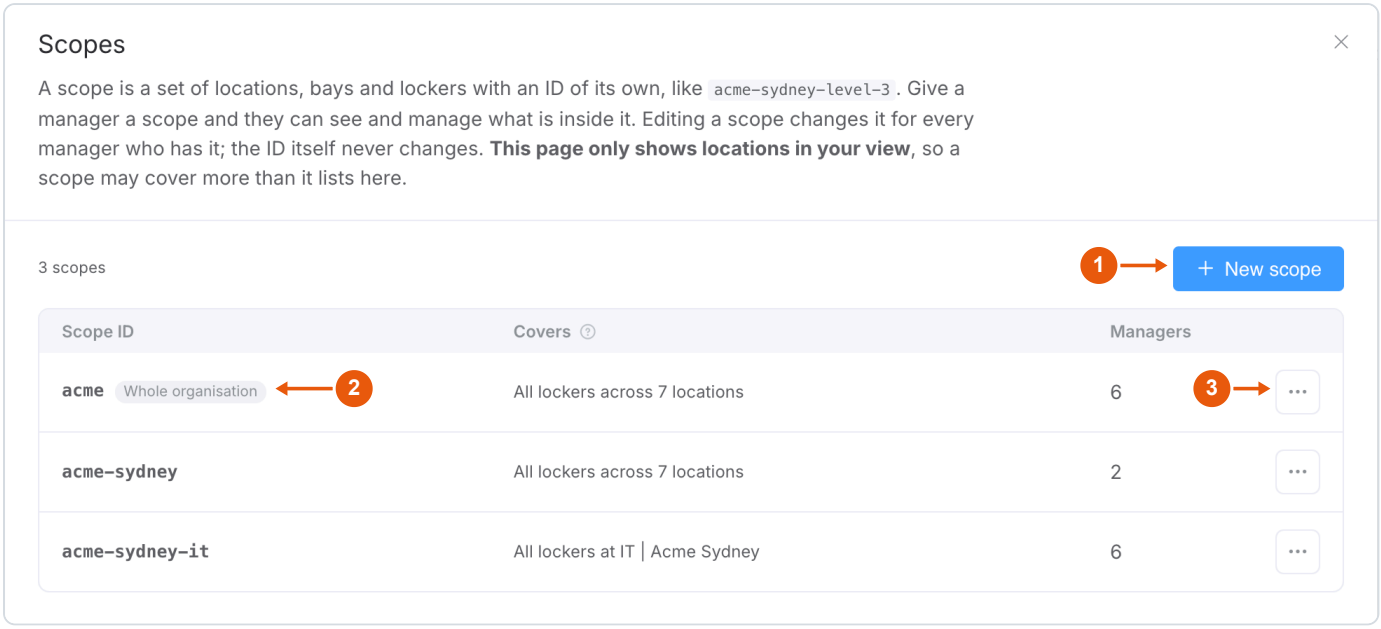
8 **Add role** adds it to the table, ready to adjust and save.

The permissions

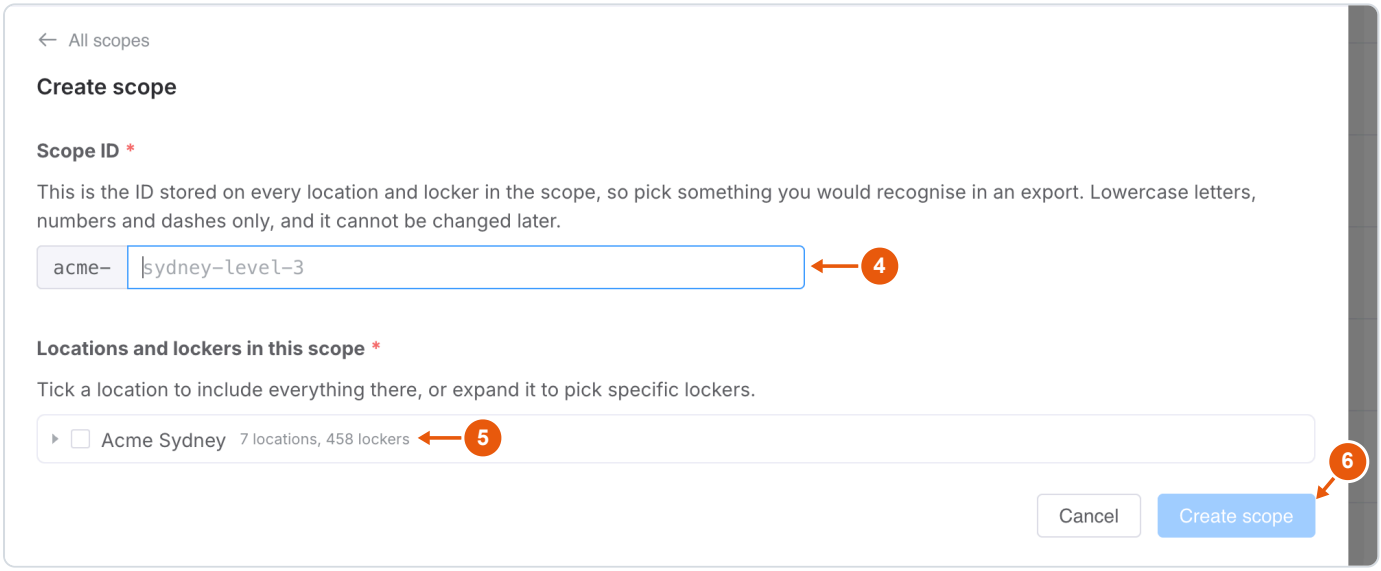
Permission	Lets the manager…
Administration	
Manage roles	Create and edit roles and give them to managers.
Dashboard pages	
Users page	See the Users page.
Groups page	See the Groups page (editing groups also needs Manage users).
Manage Locations page	See lockers and utilisation for their locations.
Configuration page	Configure the organisation: controllers, readers and locations.
Integrations page	See and configure integrations.
Reporting	See reports and statistics.
Data Export	Use the Data Export page and export buttons.
Support page	Raise and read Yellowbox support tickets. Turn off if managers should use your own help desk.
Locker actions (only on lockers in the manager's scope)	
Manage bookings	Create, end and change bookings.
Open lockers	Open lockers remotely from the dashboard.
Locker configuration tools	Change locker settings: availability, access, types and PINs.
Location configuration	Change a location's name, description and cleaner PIN (only for locations fully inside their scope).
Users & cards	
Manage users	Add, edit, disable and delete users.
Manage cards	Add and remove access cards.

Scopes

Click **Scopes** on the toolbar. A scope is a named set of locations, bays and lockers.

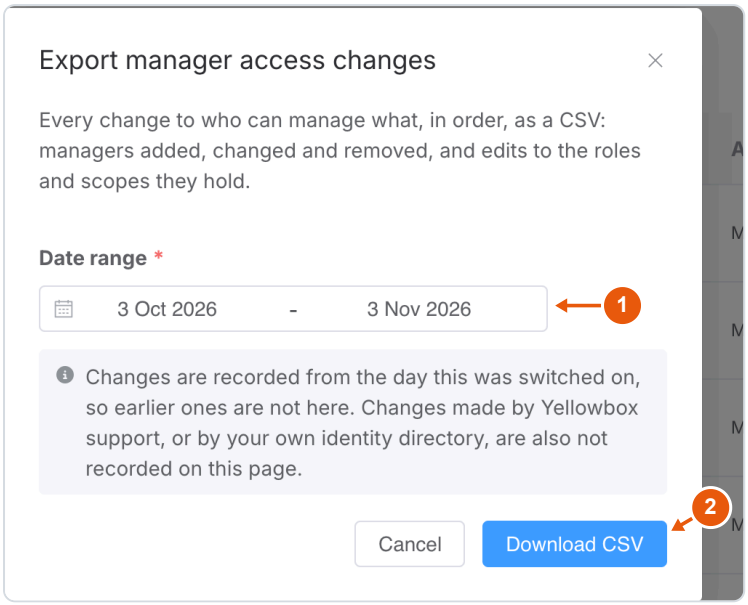


1. **New scope**: create one (next picture).
2. **Whole organisation**: the scope that covers everything your organisation has.
3. **⋯ on a scope**: Edit lockers or Delete. Editing a scope changes it for every manager who has it.



4. **Scope ID**, for example `acme-sydney-level-3`. It can't be changed later; to rename, create a new scope and delete the old one.
5. Tick a whole location (this also covers lockers added there later), or expand it to pick specific lockers.
6. **Create scope**.

Export the history



1. Pick a date range.
2. **Download CSV**: every manager added, changed or removed, and every edit to roles and scopes.

Not included: changes before the page started recording (late September 2026), changes made by Yellowbox support, and changes made by your identity system.

Link roles and scopes to your identity system

If your users sync from Entra, Okta or SailPoint, an organisation admin can link a role or a scope to one of its groups, in the Roles or Scopes window.

- **Role linked to a group:** everyone in the group becomes a manager with that role. Adding someone to the group makes them a manager; removing them takes it away.
- **Scope linked to a group:** everyone in the group covers that scope.
- Before a link is saved, the dashboard lists exactly who will be affected.
- Linked managers show a **From [group] in your identity system** tag, and their role or scope can only be changed in the identity system.

Tips

- **Want to restrict a manager?** Create a role with fewer permissions and give it to them. Until you do, every manager has Full access within their scope.
- **Changes not showing for someone?** Ask them to sign out and back in.
- **Need help?** Contact Yellowbox at contact@yellowbox.app.

Screenshots use sample data.