



User Management Guide

Create and Manage Administrator and Customer profiles

Users in your account will appear either in the Admin > Administrators list or the Customers list depending on the roles assigned to them.

From these pages you can view all of your customers/administrators, as well as Edit or Archive them.

Each user can be setup with a password and can login to view their own bookings or help manage your venue if they have been given administrator access.

Users will need to have verified their email address in order to receive system emails from Hallmaster (see Email verification section below for more information about this)

Create a New Profile

To create a new user, go to the relevant page and press the 'Create New' button.

1. An email address is required for every user, and each user must have a unique address so no two user profiles can have the same email address.
2. If you have set Customer Addresses to 'Required' in the Admin > Venue Settings menu, you can enter the address information for this user. You can add extra billing addresses later when editing this profile.
3. If this user will be a customer of your venue (ie, they will have booking) then you will need to add at least one activity and rate to the profile. These are used to calculate the total on the invoices for their bookings, as well as the data shown in the Reports menus.
4. Next, assign the roles for this user (covered in more detail below)
5. Finally, you can either Save this user, or Save and Email a password link. This will email the user a link they can follow to setup a password and login for the first time. Once this button has been pressed and they have setup a password, this button will be replaced with a 'Send Password Reset Link' button. Password create/reset links will double as email verification links too, so you don't need to send a verification link too if you have already sent the password link.

Passwords and Security

Each user in Hallmaster has a password they use to login with. We strongly recommend that you don't share logins, and that each user for your venue has their own separate email address and password they login with. This helps ensure better security for each account, as well as making the Audit Log clearer, and avoiding accidental account locking.

Accounts will become locked if an incorrect password is used to try to login to the account 6 times in a row. Once the account is locked, you will need to contact Hallmaster Support for us to unlock it from our end.



User Roles

Every user has basic Customer access to your venue, meaning they can access the Bookings and Invoicing menus to view their own bookings and invoices. If your venue has enabled it, they can make booking requests from here too.

Administrator roles can then be assigned to add further permissions to the user. Any user's roles can be changed at any time by editing their profile. Changes to a user's permissions will take effect immediately to maximise your control and security for your venue.

There are five roles that a user can have:


- Customer – This role means the user only has customer access for your venue, so has no administrator access – this is effectively just short-hand for 'No extra access or permissions'.
- Hallmaster – This role provides access to the Reports menu, and the Admin menu. This is intended for administrators looking to manage Hall setup details like price rates, room setup and other administrators.
- Booking – This role allows administrator access to the Bookings menu, where bookings can be viewed, edited, created or deleted. A booking administrator is the only administrator that can modify existing bookings and create new bookings from scratch – All other users can only make booking requests.
- Invoicing – This role allows administrator access to the Invoicing menu, where invoices can be created, edited or deleted, and have payments assigned to them. An invoicing administrator is the only administrator that can create or modify invoices or allocate payments. This role also provides limited 'Read-Only' access to the Bookings list, as this is required to raise invoices against the bookings.
- Manage Customer – This role allows access to the Customers menu, and the 'Create New Customer' menu on the Administrator booking form. Administrators with this role can create, update and archive Customers in your venue. They cannot modify Administrators.

NOTE: If you remove the 'Hallmaster' role from your profile, you will not be able to edit your profile to add it back again – Make sure there is always at least one user with the Hallmaster role assigned so you don't lock yourself out of your venue!

Search, Edit and Archive Users

The following applies to both the Customers menu and the Admin > Administrators menu.

You can search through the grid using the magnifying glass icons next to each column. If you are unable to find a profile in this list, make sure you don't have any filter running that might be excluding them from the results.

Users are never permanently deleted, they are instead marked as 'Archived' using the  icon. An archived user will not show up in this list and will not be suggested when searching for a customer in the Booking form. All of their existing bookings and invoices will remain intact, however. To view any archived users for your venue, tick the box for 'Include Archived Customers/Administrators' and wait for the results to load. Archived users will be highlighted in red.

NOTE: archived administrators will not receive any Booking or Invoicing emails, even if they have the relevant roles assigned, unless their email is set as the Primary Email.



Email addresses must be unique to each user, so cannot be used for multiple user profiles. If you need to create a new profile with an email address that is already in use by a profile you no longer need, follow these steps to free up the address for later use.

1. Find the old profile in the list and edit them
2. Add 'OLD' to either side of their email address (eg 'OLDcustomer@yourvenue.co.ukOLD')
3. Press Save
4. Find this profile in the list again and Archive them.
5. Use the 'Create New' button to create a new profile
6. Fill in the new users details along with the email address you wish to use for this user.

NOTE: Any bookings or invoices the old user may have will still be assigned to that profile, they will not automatically move over to the new user.

You may see a message like this:

This customer uses Hallmaster in other venues, so you will not be able to edit the name and email address fields.

This means this user is also registered with another venue that also happens to use Hallmaster to manage their bookings. Because of this, you will not be able to change this user's email address or name information. You can still freely change the billing address, activities/rates and roles for this user as these are unique to your venue.

To Change a customer into an administrator, go to the Customers list and edit their profile. At the bottom of the page, untick the 'Customer' role, and tick the relevant permissions this user should have access to - then press Save. This profile will then move out of the Customers list, and into the Admin > Administrators list.

The process is the same for changing an administrator into a customer. Go to the Admin > Administrators list and edit the profile, then untick the administrator roles and tick the Customer role box. The press Save.

New Customers

If you have enabled public bookings for your venue, then new customers can register themselves with your venue. When they do this, they will be assigned your venue's default Hire Charge.

New customers will be highlighted in green in your customers list, and a notification on the Customers button on the Dashboard will alert you to any new customers. They will stay 'New' until you edit their profile and confirm that the price rates etc are correct by pressing 'Save'.

Email Verification

User emails must be verified before Hallmaster can send any system emails to them. A user can verify their own email address using the provided button when they log in, or you can send them the verification link yourself. To do this, you can use the 'Email' button on the Dashboard to send in bulk, or press the '@' symbol next to this users profile in the Customers or Administrators list. The '@' symbol will show in red if the email address has not been verified, and green if it has.