



Creating New Users

Help Documentation

Creating New Users

To create a new user, log into SmarterTrack as an agent and click on the Users / Organizations icon. Then click New in the content pane toolbar. A new user window will open that the agent will use to create the user.

The new user window contains a tab to set the profile information for the user, a tab to configure standard options, such as a user's signature and avatar, a tab to choose roles to be associated to the user and a tab where the user's custom field data can be entered.

Details

Use this tab to configure the profile details of the user:

- Username - The username that will be used to log into SmarterTrack.
- Authentication Method - The method used to log into SmarterTrack. The administrator can choose to allow users to log in using a standard password, using active directory authentication or via an external provider that ties into a third-party product, such as a CRM or control panel. For more information, see External Providers .
- Authentication Domain - When using active directory authentication, the domain used for authentication of the login username and password.
- New Password - When using password authentication, this allows administrators to change the login password by typing a new password in this field.
- Confirm Password - When using password authentication, this allows administrators to verify the new password by retyping it in this field.
- Email Address - The user's email address.
- Display Name - The friendly name used to identify the user within the SmarterTrack system.
- Address - The physical address of the user.
- Time Zone - To specify the time zone, select the appropriate time zone from the list.
- Preferred Language - The language the Web interface should be shown in to this user. The list of languages in the drop down menu is pulled from the list of configured Supported Languages.

Contact Info

Use this tab to set specific contact details for the user:

- Website - The user's personal website.
- Home Phone - The user's home phone number.
- Cell Phone - The user's cell phone number.
- Work Phone - The user's work phone number.

- Other Phone - The user's alternate phone number.
- Company - The name of the company the user works for
- Address - The user's physical address.

Portal Settings

Use this tab to configure standard Portal options for the user:

- Avatar Provider - SmarterTrack allows users to use popular services for maintaining consistency with the avatars they use across the Internet. This dropdown lists several, along with the option to upload a custom avatar.
- Avatar - The display picture as provided by the Avatar Provider or one uploaded. Note: Avatars are compressed after 30 days of inactivity to reduce disk space and reduce the number of files on the server.
- Subscribe to community posts automatically - Checking this box allows the user to automatically be subscribed to Community threads that they create or post in.
- Email summaries of subscribed community posts - Checking this box allows notification emails for Community threads users are subscribed to that have had a new reply or the status or type changed.
- Email new messages from conversations - Checking this box allows notification emails for new messages received in the Community.
- Banned from community - Checking this box will ban the user from participating within the Community. While Community threads may be viewed, the user will not be able to reply to threads, comment on replies, vote on threads, etc. Banning a user here will display the user on the Banned tab within the Community, and banning a user in the Community will enable this setting. Note: Banning a user in the Community can only be done if the user has been reported for abuse.
- Portal Signature - Use this field to create an HTML-rich signature that will be displayed in the Portal, such as in Community threads and replies.

Roles

This tab displays the roles assigned to the user. A user's permissions are defined by the roles to which he/she is assigned. For more information, see Roles .

To assign a Role to a User from Roles tab, simply select the checkbox next to the Role you want to assign. Then be sure to save your changes.

To remove a Role, simply uncheck it from the list and save your changes.

Custom Fields

This tab displays the available custom fields for the user preferences. For more information on custom fields, see [Custom Fields](#) .