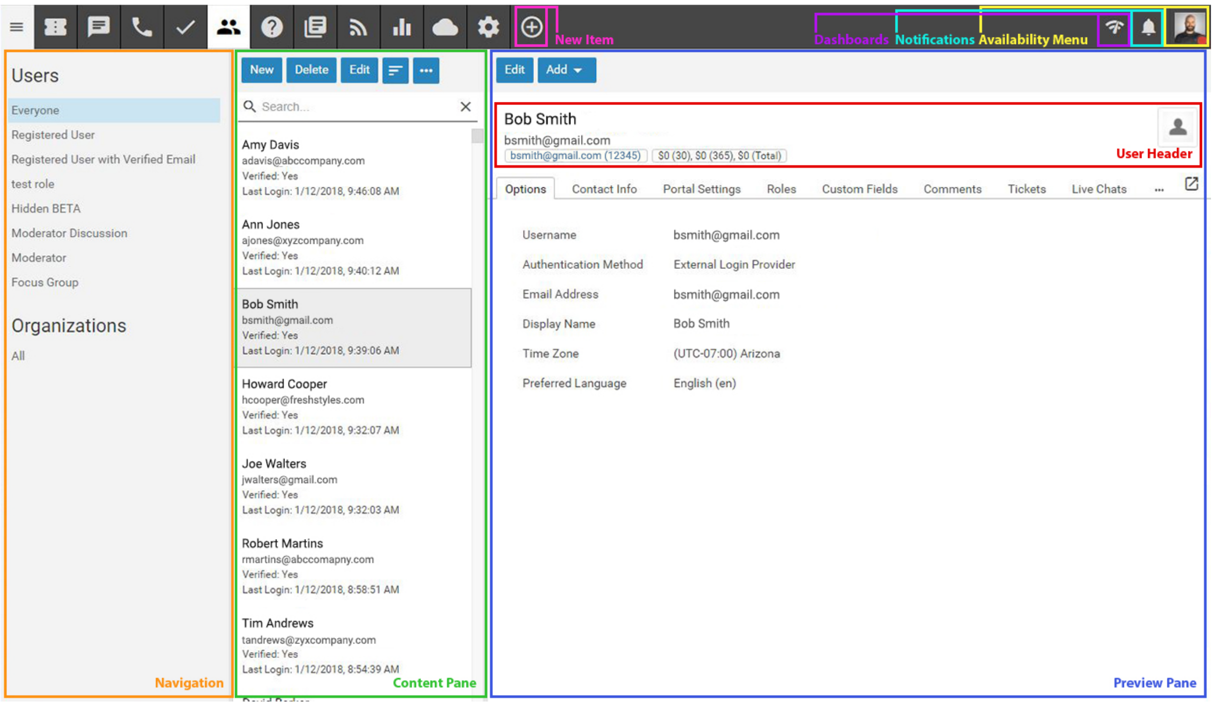
Viewing Users

Help Documentation

Viewing Users

To view a user, simply click on the desired row and the user details will load in the preview pane. If you would rather view the user in a popup window, double-click the user instead. Note: Double-clicking a user also enables you to edit the user.



In general, the following options are available from the preview pane toolbar:

- Edit - Allows the agent or administrator to modify the selected user.
- Add - Allows you to add itmes to the paricular user:
- Comment - Add a comment about a particular user that's available to other agents and managers, but NOT available to the general public.
- New Ticket - Creates a new ticket with the user’s email address in the To field.
- New Call Log - Creates a new call log with the user’s email address in the Email field.

Tabs within a User Preview

A user’s details are organized within the following tabs:

- Details - Displays the profile information for the user, such as their username, email address, preferrend language, etc.
- Contact Info - Lists any contact information about the user, such as their phone number(s), home address, etc.
- Portal Settings - Shows the user's portal settings, such as their avatar, the settings selected for community actions and more.

- Roles - Lists the available roles and denotes which of them are assigned to the user.
- Custom Fields - Displays the custom fields that have been configured for the user.
- Comments - Displays any agent-added user comments. Note: User comments can be added by clicking Add in the toolbar of the User pop up window.
- Tickets - Displays all of the tickets that have been submitted under the user's email address.
- Live Chats - Displays all of the live chats this user has started with their account email address.
- Calls - Displays all of the call logs the user is associated to.
- Surveys - Displays all survey results for surveys the user has completed.
- Statistics - Displays statistics regarding the user’s ticket submissions, live chats, calls and time logs.
- History - Displays information about the date and time of the user’s last login, ticket, live chat, call and time log.

Viewing Users by Role

The navigation pane lists every role that can be applied to end users. To view a list of all users assigned to a specific role, expand the Users folder and click on the desired role. The list of users will load in the content pane.