



# Users / Organizations Overview

Help Documentation

## Users / Organizations Overview

The Users / Organizations section allows agents to view all customer communication from one, convenient location. Users (those who use SmarterTrack to submit the inquiries, issues and comments that agents work on) can be viewed individually to see their profile information, statistics of their contact with your agents, communication via tickets, live chats and calls, survey history and more.

Multiple users can also be grouped together into an Organization that displays all of the tickets, live chats, call logs and surveys associated with its users. This is convenient for when more than one person is in contact with your company. For example, two users may be working together to complete a purchase. One of them will decide which product is needed; the other will complete the purchase. When the purchaser calls in to make complete the transaction, rather than searching through all tickets, live chats and calls, the agent can simply look at their Organization to see their collaborative wants and needs.

To access the users and organizations, click the Users / Organizations icon . A list of all configured users will load in the content pane.

For help understanding the different areas of the Users / Organizations section, see the two interface diagrams for Users and Organizations .

### Navigating Users

In general, the following columns are available in the content pane when viewing users:

- **Checkbox** - Use these boxes to select multiple users. Users must be selected before choosing an action from the toolbar.
- **User** - The display name of the user.
- **Email Address** - The end user's email address.
- **Role** - Indicates that the end user has a User role.
- **Verified Email** - A yes/no indication of whether the user's email address has been verified.
- **Last Login** - The date and time in which the employee last logged into SmarterTrack.

### Navigating Organizations

In general, the following columns are available in the content pane when viewing organizations:

- **Checkbox** - Use these boxes to select multiple organizations. Organizations must be selected before choosing an action from the toolbar.
- **Organization** - The name of the organization.
- **Website** - The website associated to the organization.

- Phone Number - The phone number that is associated to the organization.
- Filters - The number of filters used to customize the organization's list of users.

## **Performing User / Organization Actions**

In general, the following actions are available from the content pane toolbar:

- New - Creates a new user or organization.
- Delete - Deletes the selected users or organizations. For more information, see [Deleting Users](#) and [Deleting Organizations](#) .
- Refresh - Refreshes the grid to show the most updated data.