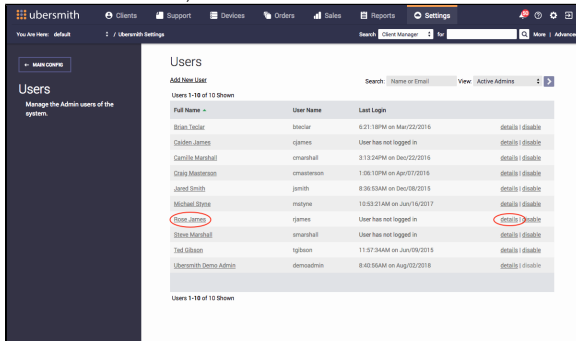


Managing Users

Once you have [created users](#), you can perform various actions on them.

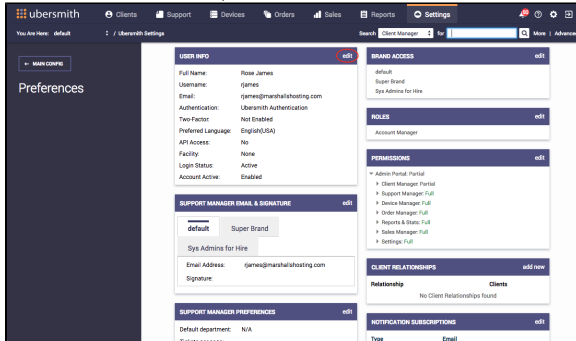
Editing User Info

1. [Access the Users page](#).
2. From the *User's* row, click their name or **details**.



The *Preferences* page appears.

3. In the *Users Info* section, click **edit**.



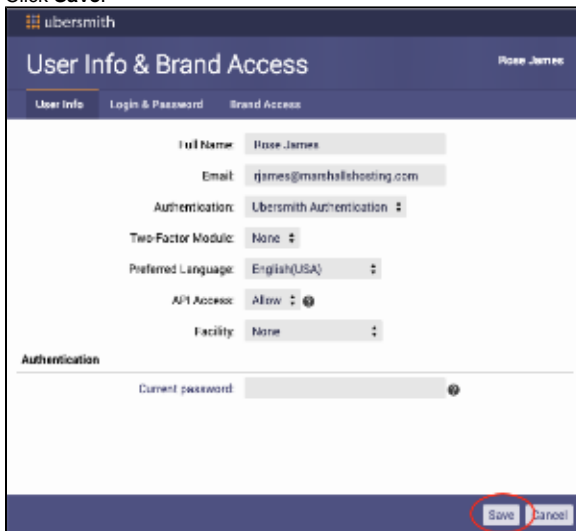
The *User Info & Brand Access* page appears.

4. Make any necessary changes.

Note

Note: If you need to change a user's email address, you must first provide **your** current password.

5. Click **Save**.



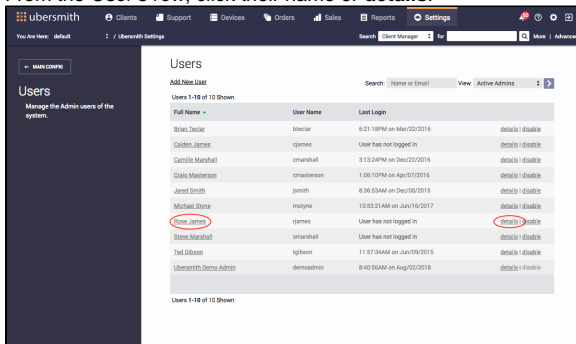
On this page:

On this page:

- [Editing User Info](#)
- [Editing Brand Access](#)
- [Editing User Roles](#)
- [Editing Permissions](#)
- [Configuring Client Relationships](#)
- [Configuring Event Alert Preferences](#)
- [Configuring API Tokens](#)
 - [Generating API Tokens](#)
 - [Extending API Tokens](#)
 - [Deleting API Tokens](#)
- [Configuring Support Manager Emails, Signatures, and Avatars](#)
 - [Complete the Default Tab](#)
 - [Complete the Brand Tab](#)
- [Configuring Support Manager Preferences](#)
 - [Complete the Support Manager Preferences Tab](#)
- [Configuring Support Department Preferences](#)
 - [Complete the Support Dept Preferences Tab](#)
- [Configuring the Order Manager Preferences Section](#)
 - [Complete the Order Manager Preferences Tab](#)
- [Configuring the Client Manager Preferences Section](#)
 - [Complete the Client Manager Preferences Tab](#)
- [Configuring the Sales Manager Preferences Section](#)
 - [Complete the Sales Manager Preferences Tab](#)
- [Disabling Users](#)
- [Enabling Users](#)
- [Viewing Login History](#)
- [Viewing Event Log](#)
- [Viewing Device Event Log](#)
- [Viewing Ticket Event Log](#)
- [Viewing Ticket List](#)
- [Viewing Active Sessions](#)
- [Related Topics](#)

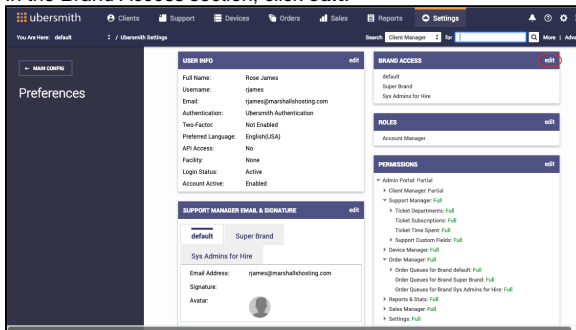
Editing Brand Access

1. Access the [Users page](#).
2. From the *User's* row, click their name or **details**.



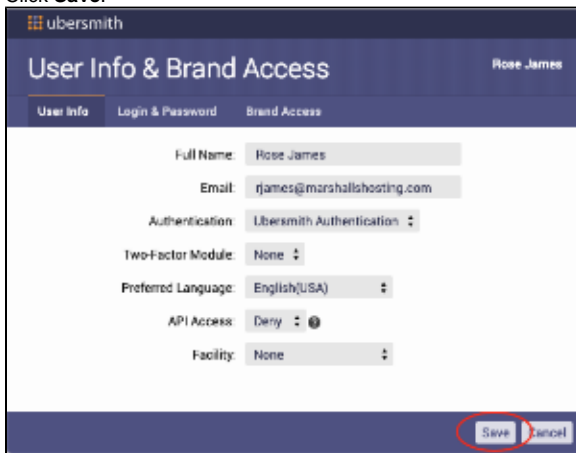
The *Preferences* page appears.

3. In the *Brand Access* section, click **edit**.



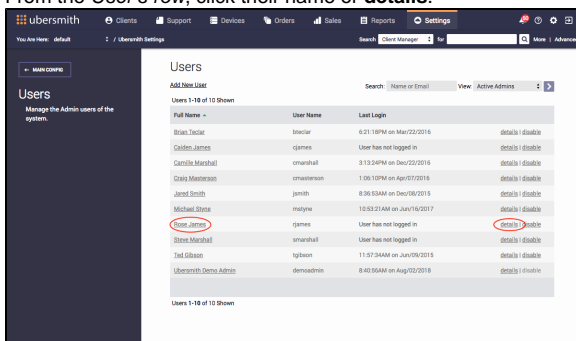
The *User Info & Brand Access* page appears.

4. Make any necessary changes.
5. Click **Save**.



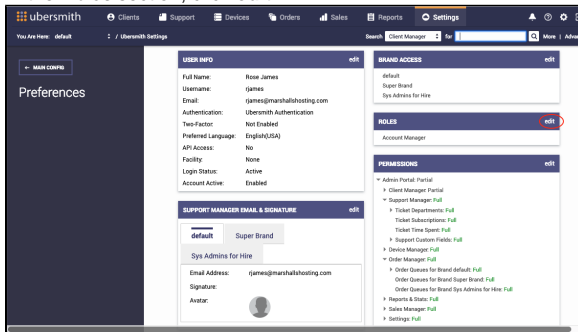
Editing User Roles

1. Access the [Users page](#).
2. From the *User's* row, click their name or **details**.



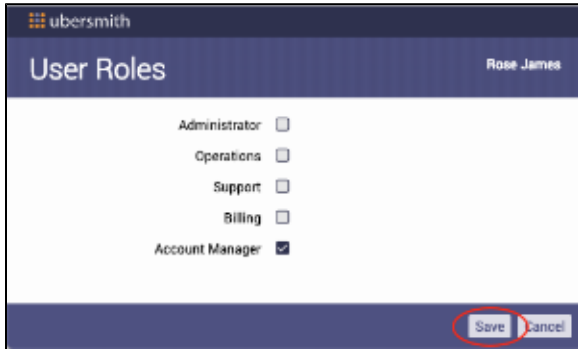
The *Preferences* page appears.

3. In the *Roles* section, click **edit**.



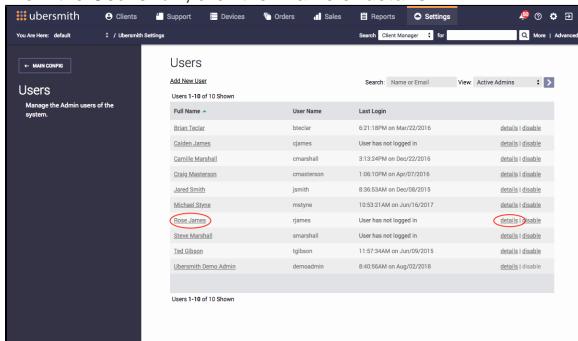
The *User Roles* page appears.

4. Make any necessary changes.
5. Click **Save**.



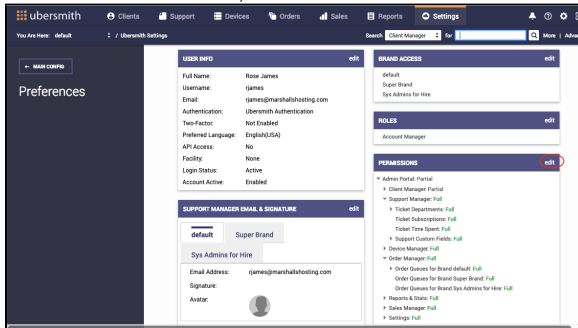
Editing Permissions

1. Access the *Users* page.
2. From the *User's* row, click their name or **details**.



The *Preferences* page appears.

3. In the *Permissions* section, click **edit**.



The *User Permissions* page appears.

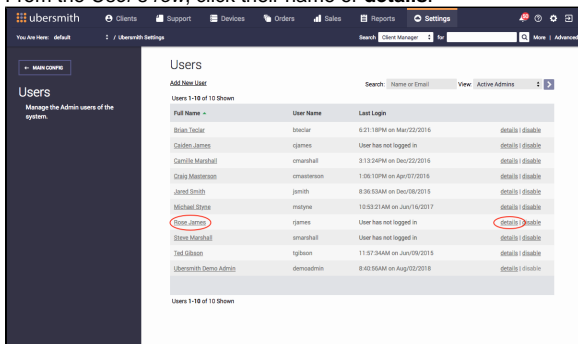
4. Make any necessary changes.

5. Click **Update**.



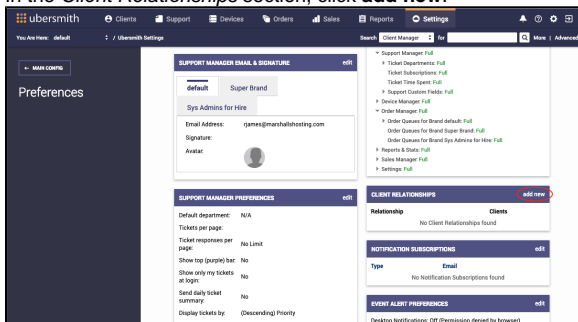
Configuring Client Relationships

1. Access the **Users** page.
2. From the **User's** row, click their name or **details**.



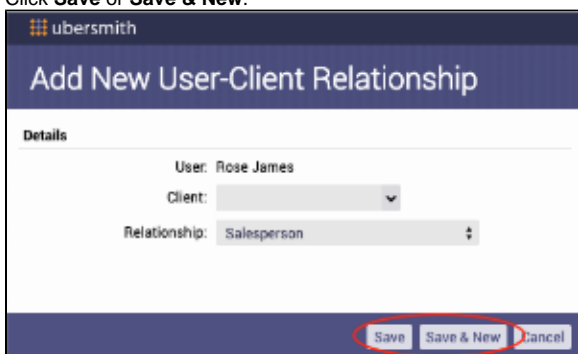
The **Preferences** page appears.

3. In the **Client Relationships** section, click **add new**.



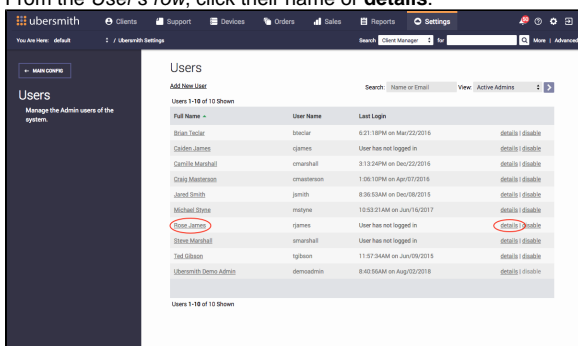
The **Add New User-Client Relationship** page appears.

4. In the **Client** field, select the client for which you want to assign a relationship.
5. In the **Relationship** field, select the type of relationship to assign.
6. Click **Save** or **Save & New**.



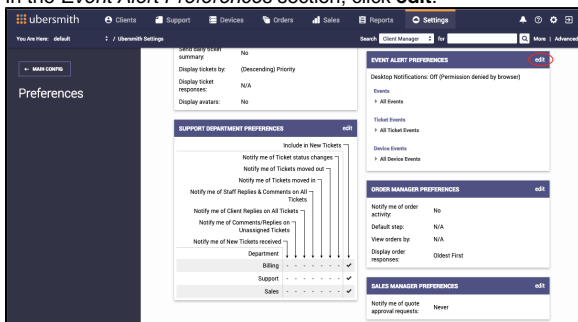
Configuring Event Alert Preferences

1. Access the [Users page](#).
2. From the *User's* row, click their name or **details**.



The *Preferences* page appears.

3. In the *Event Alert Preferences* section, click **edit**.



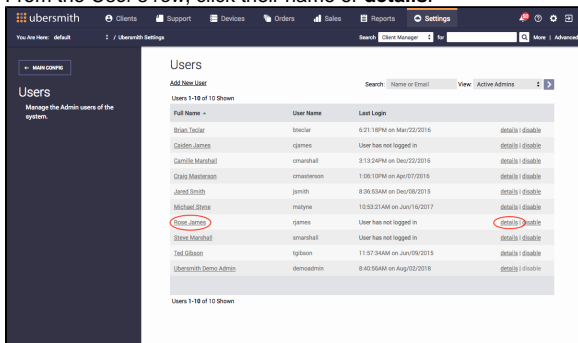
The *Event Alert Preferences* page appears. See [Using Event Alerts](#) for more information.

Configuring API Tokens

You can configure API tokens for users to use in place of passwords for accessing the Ubersmith API. This section displays if the **API Access** field is **Yes** in the *User Info* section.

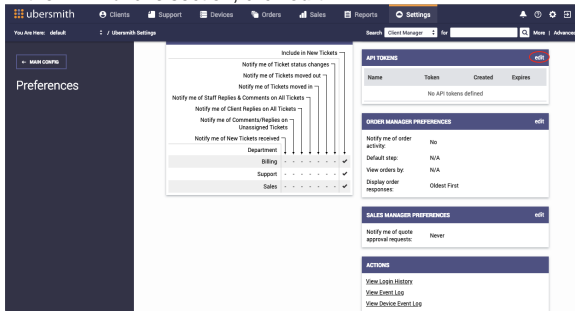
Generating API Tokens

1. Access the [Users page](#).
2. From the *User's* row, click their name or **details**.



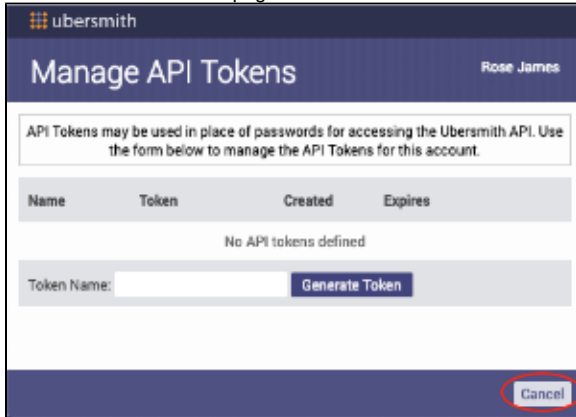
The *Preferences* page appears.

- In the **API Tokens** section, click **edit**.



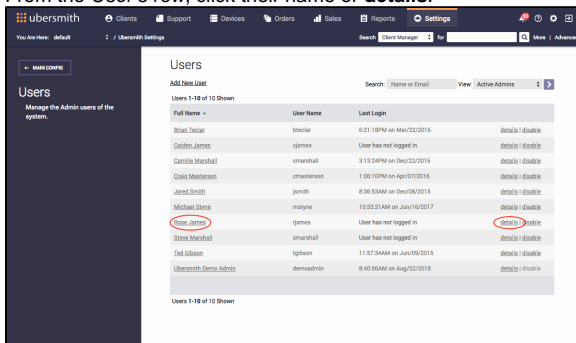
The **Manage API Tokens** page appears.

- In the **Token Name** field, enter the name of the token.
- Click **Generate Token**, which grants access to the API for a year.
- Click **Cancel** to close the page.



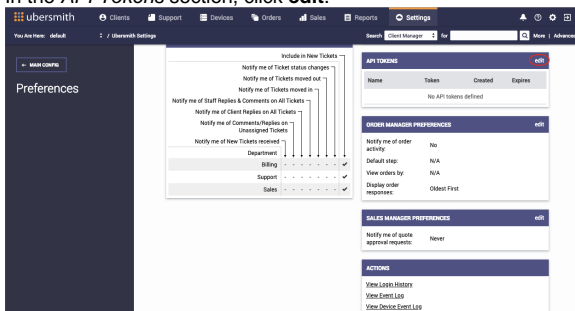
Extending API Tokens

- After you have created an API token for a user, you can extend the default expiration date of one year, by another year.
- [Access the Users page.](#)
- From the **User's** row, click their name or **details**.



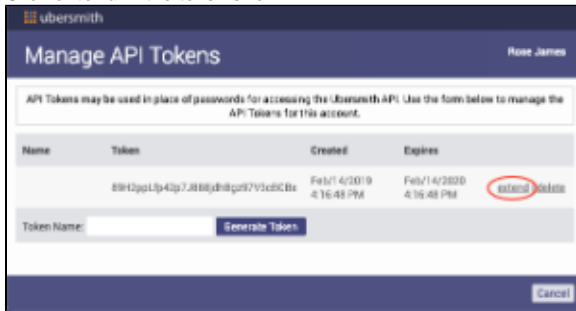
The **Preferences** page appears.

- In the **API Tokens** section, click **edit**.



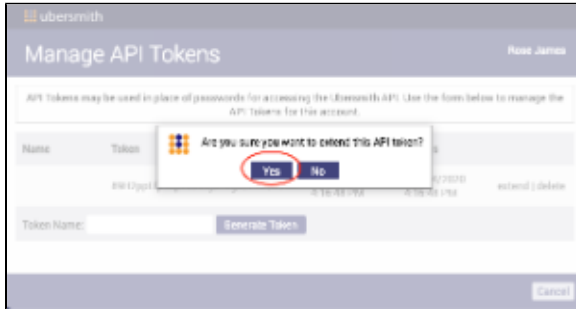
The **Manage API Tokens** page appears.

- Click **extend** in the token's row.



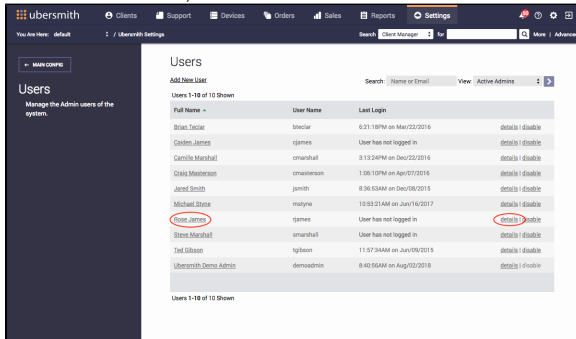
A confirmation message appears.

- Click **Yes**.



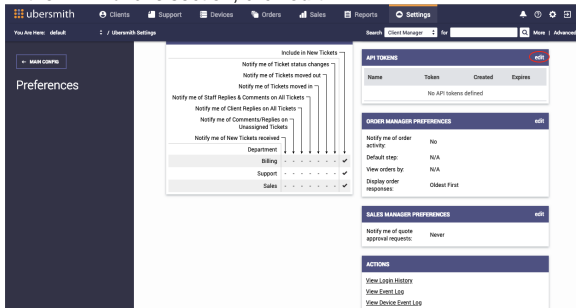
Deleting API Tokens

- Access the [Users](#) page.
- From the *User's* row, click their name or **details**.



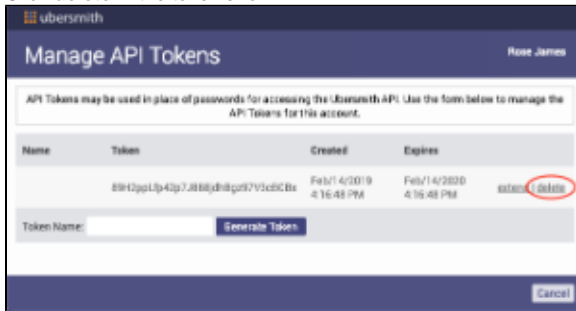
The *Preferences* page appears.

- In the *API Tokens* section, click **edit**.



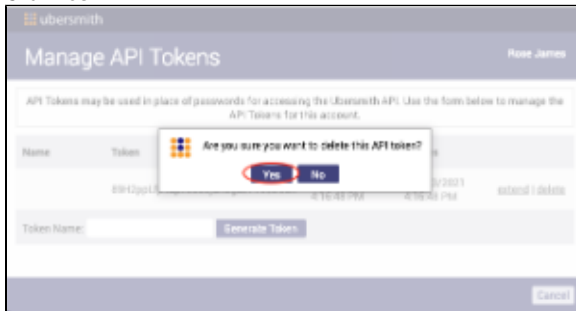
The *Manage API Tokens* page appears.

- Click **delete** in the token's row.



A confirmation message appears.

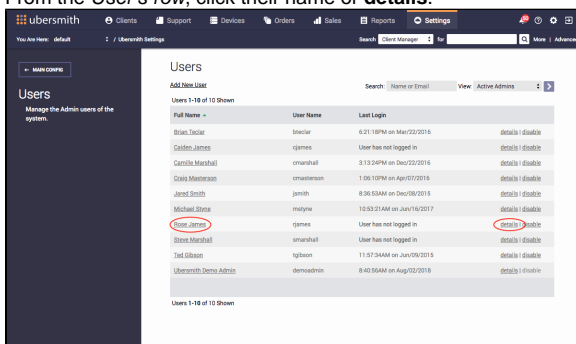
- Click **Yes**.



Configuring Support Manager Emails, Signatures, and Avatars

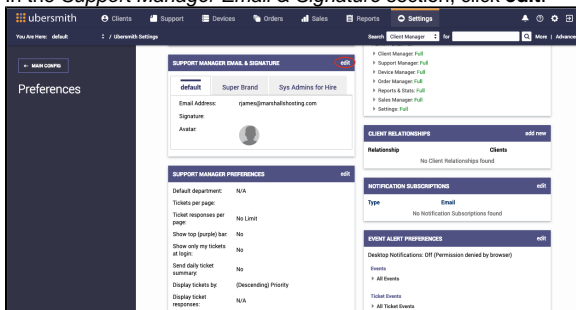
You can configure your emails, email signatures and avatars for the Support Manager.

- Access the [Users](#) page.
- From the *User's* row, click their name or **details**.



The *Preferences* page appears.

- In the *Support Manager Email & Signature* section, click **edit**.



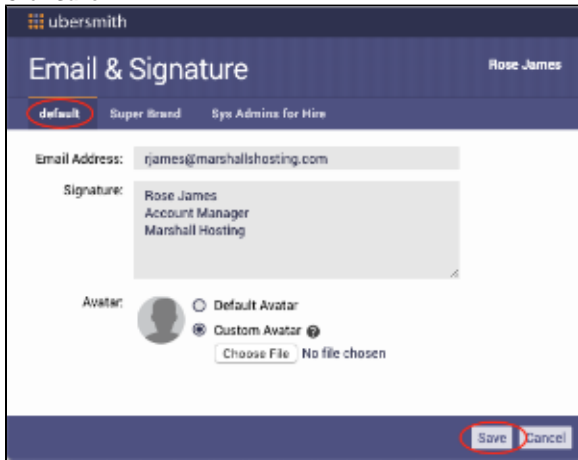
The *Email & Signature* page appears.

Complete the Default Tab

The default tab configures your email address, signature, and avatar for your default company brand.

- In the **Email Address** field, enter your default company email address.
- In the **Signature** field, enter text to display as your email signature for your default company.
- In the **Avatar** field, select either **Default Avatar** or **Custom Avatar**. If you selected **Custom Avatar**, the **Choose File** field enables.

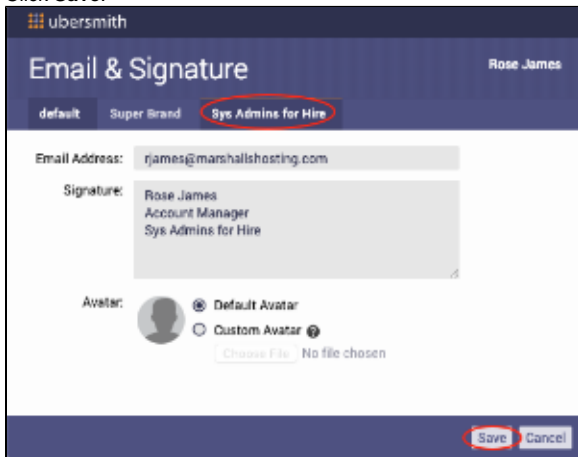
4. Click **Choose File**, navigate to the location of your avatar file, and click **Open**. A 50 x 50 pixel GIF, JPG, or PNG file can be uploaded and used as your avatar. In order to enable the **Avatar** field, you must select either **Admin Interface Only** or **Admin & Client Interface** in the Support General Settings page. To display client avatars, your client needs to upload a file to gravatar.com, which Ubersmith will pull from.
5. Click **Save**.



Complete the Brand Tab

The brand tab configures your email address, signature, and avatar for any other company brands you have set up.

1. Click the *brand* tab. If there is more than one brand, a tab for each brand displays.
2. In the **Email Address** field, enter your brand company email address.
3. In the **Signature** field, enter text to display as your email signature for your brand company.
4. In the **Avatar** field, select either **Default Avatar** or **Custom Avatar**. If you selected **Custom Avatar**, the **Choose File** field enables.
5. Click **Choose File**, navigate to the location of your avatar file, and click **Open**. A 50 x 50 pixel GIF, JPG, or PNG file can be uploaded and used as your avatar. In order to enable the **Avatar** field, you must select either **Admin Interface Only** or **Admin & Client Interface** in the Support General Settings page. To display client avatars, your client needs to upload a file to gravatar.com, which Ubersmith will pull from.
6. Click **Save**.

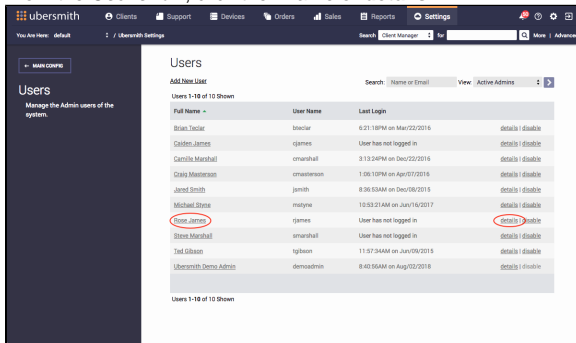


Configuring Support Manager Preferences

You can set your own preferences for the *Support Manager Dashboard*.

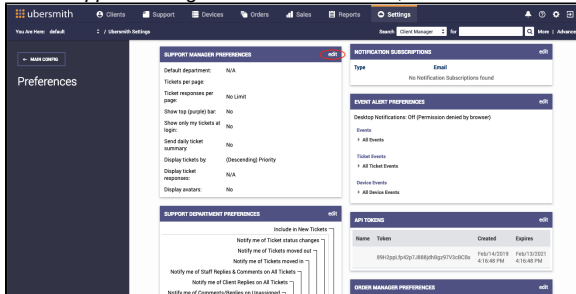
1. [Access the Users page.](#)

- From the *User's* row, click their name or **details**.



The *Preferences* page appears.

- In the *Support Manager Preferences* section, click **edit**.



The *Support, Order, Client & Sales Manager Preferences* page appears.

Complete the Support Manager Preferences Tab

- In the **Default departments** field, select the support department you want to set as your default department. See Adding Support Departments for more information.
- In the **Tickets per page** field, enter how many tickets you want to display per page.
- In the **Ticket responses per page** field, enter how many ticket responses you want to display per page.
- In the **Show top (purple) bar** field, select **Yes** to display the *Support Manager title* (purple bar) in the interface.
- In the **Show only my tickets at login** field, select **Yes** to display only tickets you are assigned to when you first login to Ubersmith.
- In the **Send daily ticket summary** field, select **Yes** to receive a daily report of your support tickets.
- In the **Display tickets by** field, select the first method of displaying the tickets, and in ascending or descending order. In the **then by** field, select the second method of sorting the tickets by ascending or descending order, and the **second then by** field, select the third way to sort.
- In the **Display ticket responses** field, either **Oldest First** or **Newest First**.
- In the **Display avatars** field, select **Yes** to display other user's avatars.
- Click **Save**.



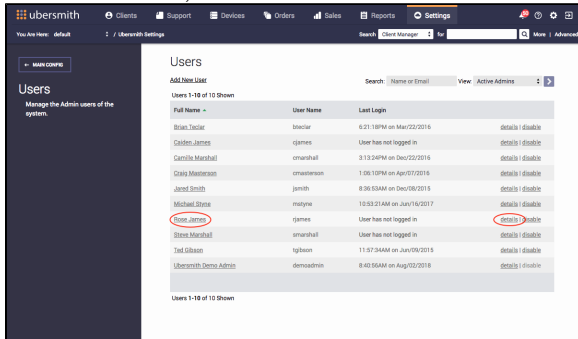
Configuring Support Department Preferences

Most Support Manager events create a notification email. If the event occurs to a ticket that is assigned to you or one that you are subscribed, you will always receive an email notification of the activity.

You can configure the Support Manager to automatically notify you when set ticket activity occurs for tickets that you are not explicitly assigned to for each support department.

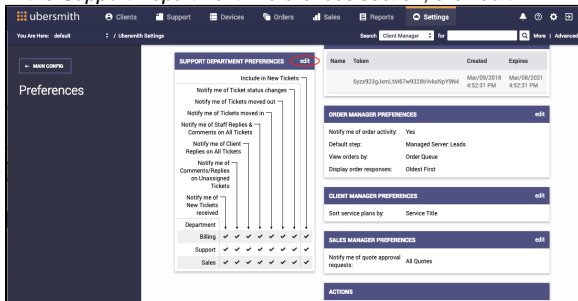
You can select from a matrix of options, what kinds of ticket actions to be notified of for each support department from this tab.

1. [Access the Users page.](#)
2. From the *User's* row, click their name or **details**.



The *Preferences* page appears.

3. In the *Support Department Preferences* section, click **edit**.

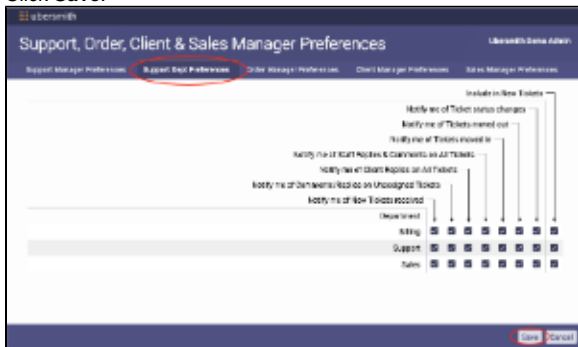


The *Support, Order, Client & Sales Manager Preferences* page appears.

Complete the Support Dept Preferences Tab

You can select from a matrix of options, what kinds of ticket actions to be notified of for each support department from this tab.

1. Click the *Support Dept Preferences* tab.
2. Select **Notify me of New Tickets received** to see all new tickets entered into the department.
3. Select **Notify me of Comments/Replies on Unassigned Tickets** to see any comments or client/staff follow ups posted to tickets not currently assigned to a user in the department.
4. Select **Notify me of Client Replies on All Tickets** to see all client follow ups in the department regardless of which user the ticket is explicitly assigned to.
5. Select **Notify me of Staff Replies & Comments on All Tickets** to see all staff follow ups or comments in the department regardless of which user the ticket is explicitly assigned to.
6. Select **Notify me of Tickets moved in** to see any ticket that is moved into the department.
7. Select **Notify me of Tickets moved out** to see any ticket that is moved out of the department.
8. Select **Include in New Tickets** to specify whether the tickets in the particular department are to be included when viewing the list of new tickets in the support manager.
9. Click **Save**.

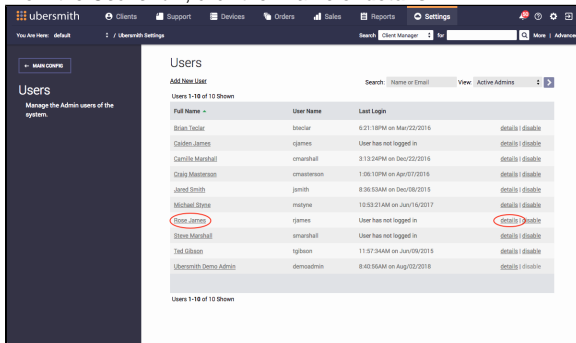


Configuring the Order Manager Preferences Section

You can set your own preferences for the *Order Manager Dashboard*.

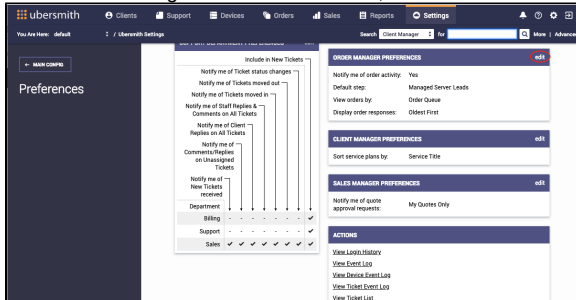
1. [Access the Users page.](#)

- From the *User's* row, click their name or **details**.



The *Preferences* page appears.

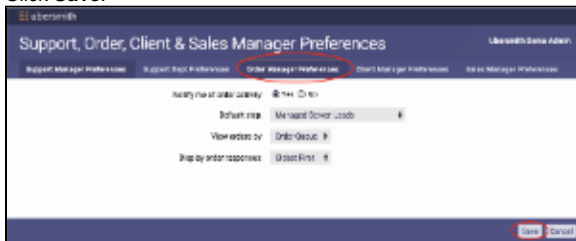
- In the *Order Manager Preferences* section, click **edit**.



The *Support, Order, Client & Sales Manager Preferences* page appears.

Complete the Order Manager Preferences Tab

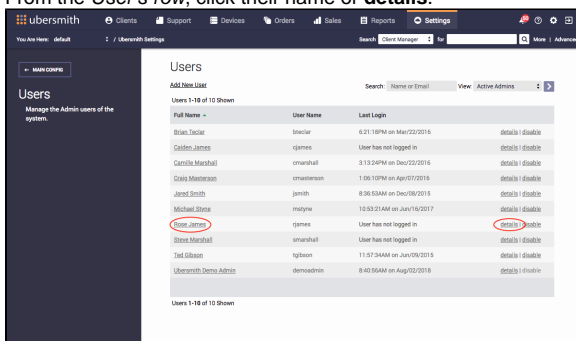
- In the **Notify me of order activity** field, select **Yes** to receive a notification when any actions occur in the *Order Manager*.
- In the **Default step** field, select the order step to be expanded in the *Order Manager View Panel*.
- In the **View orders by** field, select the default view for the *Order Manager View Panel*, either **Order Queue** or **Order Status**.
- In the **Display order responses** field, select **Oldest First** or **Newest First**.
- Click **Save**.



Configuring the Client Manager Preferences Section

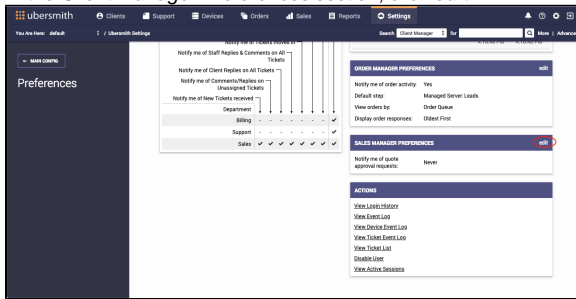
You can set your own preferences for the *Client Manager Dashboard*.

- Access the [Users](#) page.
- From the *User's* row, click their name or **details**.



The *Preferences* page appears.

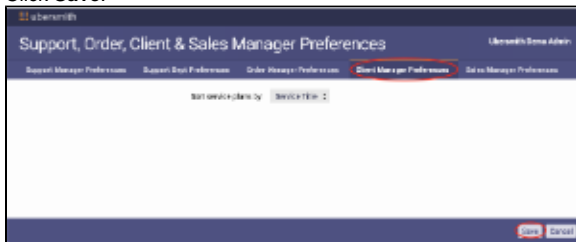
3. In the *Client Manager Preferences* section, click **edit**.



The *Support, Order, Client & Sales Manager Preferences* page appears.

Complete the Client Manager Preferences Tab

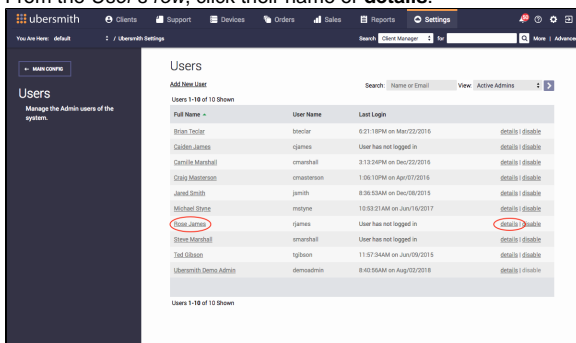
1. In the **Sort service plans by** field, select **Service Title** to sort your service plan by service title or **ID** to sort your service plans by service ID.
2. Click **Save**.



Configuring the Sales Manger Preferences Section

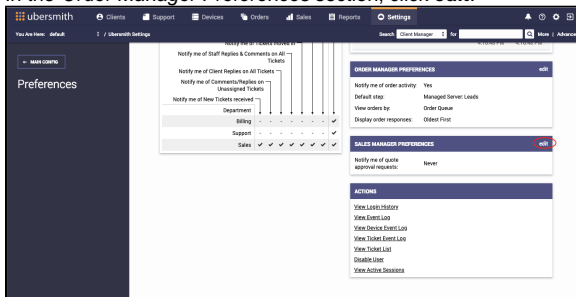
You can set your own preferences for the *Sales Manager Dashboard*.

1. [Access the Users page](#).
2. From the *User's* row, click their name or **details**.



The *Preferences* page appears.

3. In the *Order Manager Preferences* section, click **edit**.

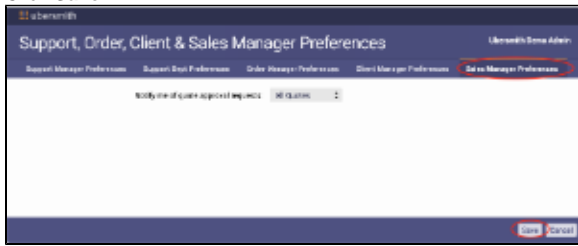


The *Support, Order, Client & Sales Manager Preferences* page appears.

Complete the Sales Manager Preferences Tab

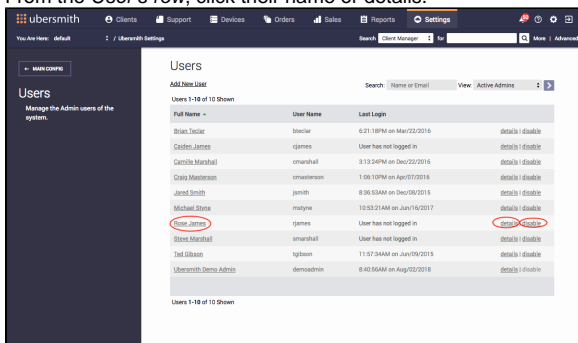
1. In the **Notify me of quote approval request** field, select **Never**, **My Quotes Only**, or **All Quotes**.

2. Click **Save**.



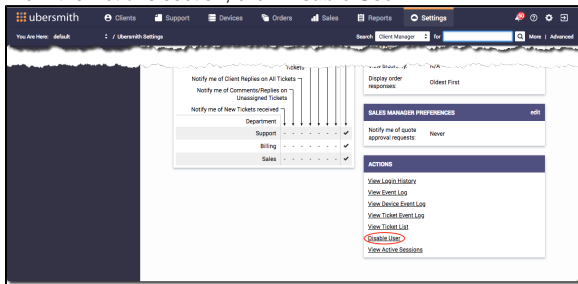
Disabling Users

1. Access the [Users](#) page.
2. From the *User's* row, click **disable**.
- or -
- From the *User's* row, click their name or details.



The *Preferences* page appears.

3. From the *Actions* section, click **Disable User**.

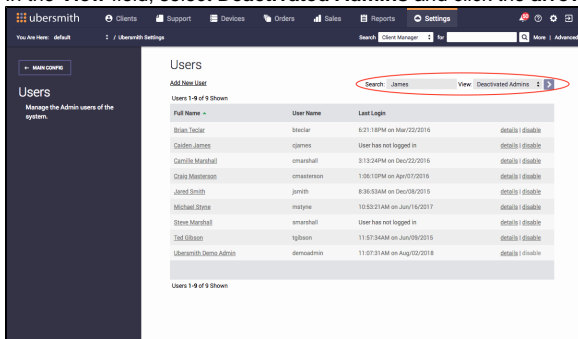


4. A confirmation message appears.
5. Click **Yes**.

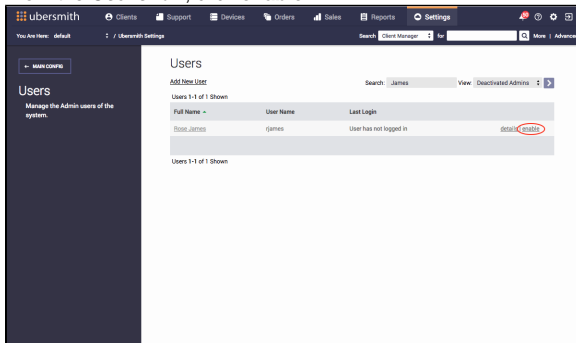


Enabling Users

1. Access the [Users](#) page.
2. In the **Search** field, enter the user's name, if necessary.
3. In the **View** field, select **Deactivated Admins** and click the arrow.



- From the *User's* row, click **enable**.



A confirmation message appears.

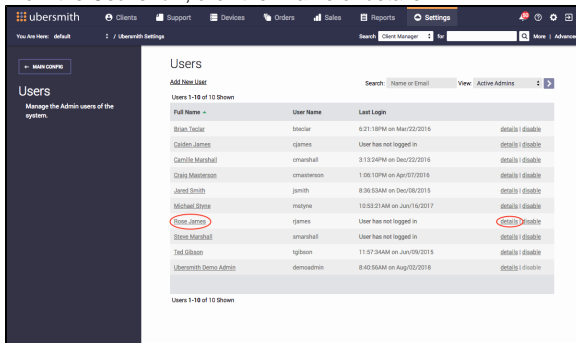
- Click **Yes**.



Viewing Login History

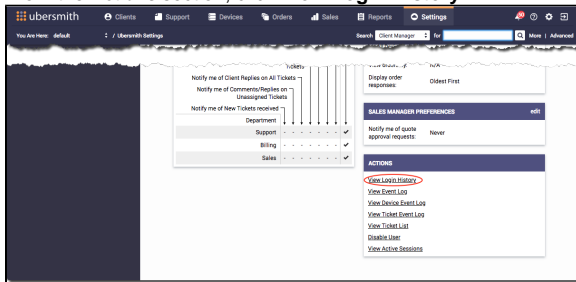
The *Login History* reports displays the date and time the user logged in and logged out of Ubersmith.

- Access the *Users* page.
- From the *User's* row, click their name or details.



The *Preferences* page appears.

- From the *Actions* section, click **View Login History**.



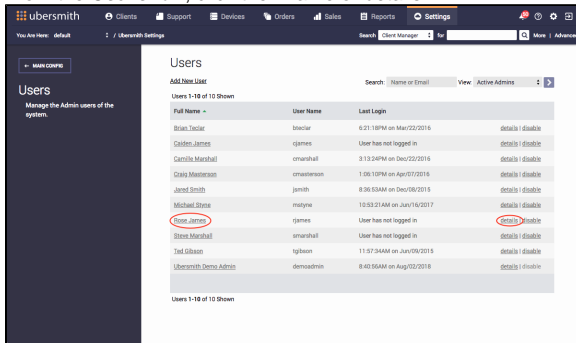
The *Admin User Log* page appears.

Viewing Event Log

The *Event Log* displays the user's actions taken in Ubersmith.

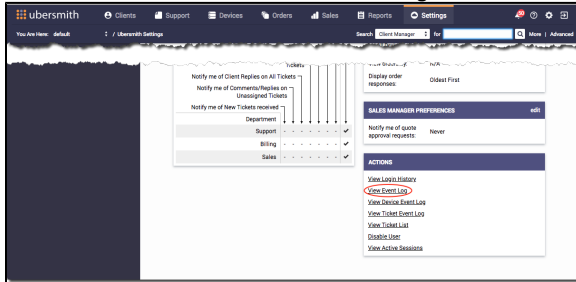
- Access the *Users* page.

2. From the *User's* row, click their name or details.



The *Preferences* page appears.

3. From the *Actions* section, click **View Event Log**.

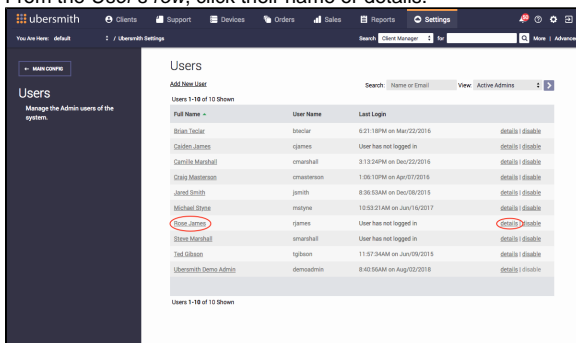


The *Event Log* page appears.

Viewing Device Event Log

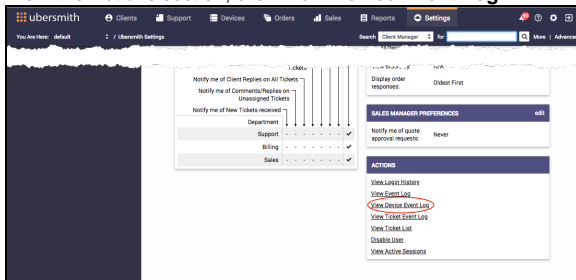
The *Device Event Log* displays the user's actions taken on devices in Ubersmith.

1. [Access the Users page.](#)
2. From the *User's* row, click their name or details.



The *Preferences* page appears.

3. From the *Actions* section, click **View Device Event Log**.



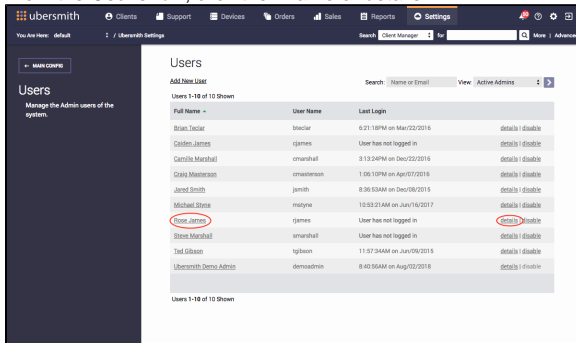
The *Device Event Log* page appears.

Viewing Ticket Event Log

The *Ticket Event Log* displays the user's support ticket actions taken in Ubersmith.

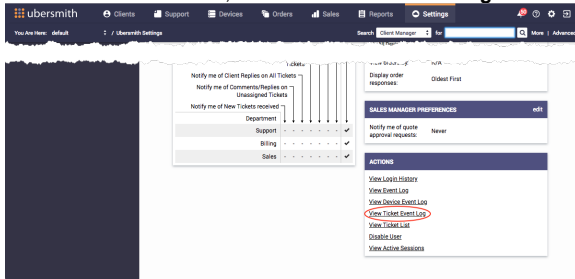
1. [Access the Users page.](#)

- From the *User's* row, click their name or details.



The *Preferences* page appears.

- From the *Actions* section, click **View Ticket Event Log**.

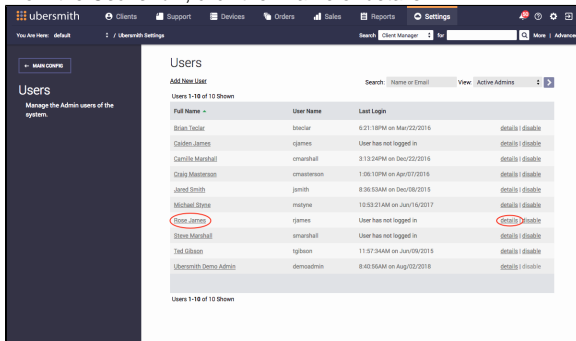


The *Ticket Event Log* page appears.

Viewing Ticket List

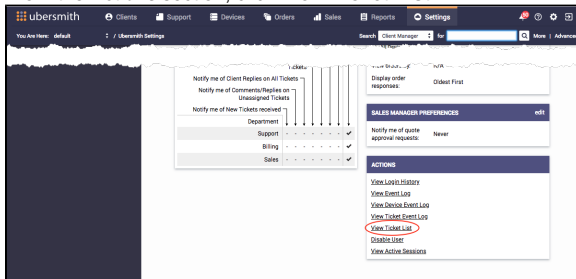
The *Open/On Hold Tickets* displays the user's assigned open and on hold support tickets.

- Access the *Users* page.
- From the *User's* row, click their name or details.



The *Preferences* page appears.

- From the *Actions* section, click **View Ticket List**.



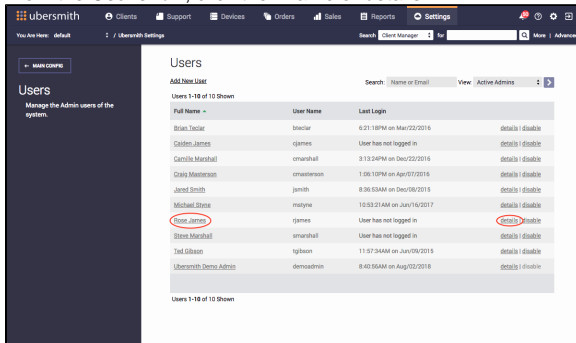
The *Open/On Hold Tickets* page appears.

Viewing Active Sessions

The *Active Sessions* report displays users currently logged into Ubersmith.

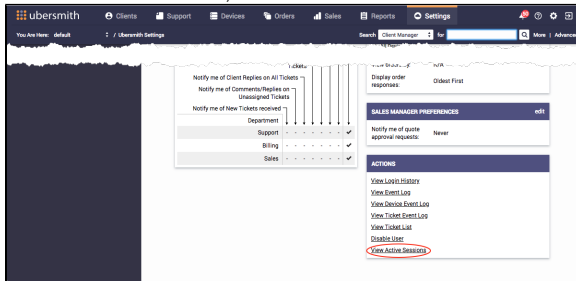
- Access the *Users* page.

2. From the *User's* row, click their name or details.



The *Preferences* page appears.

3. From the *Actions* section, click **View Active Sessions**.



The *Active Sessions* page appears.

Related Topics

[Adding Users](#)

[Adding User Roles](#)

[Managing User Roles](#)