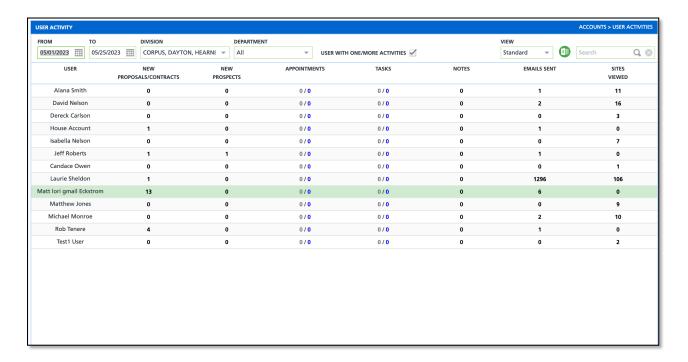
User Activities

Last Modified on 12/11/2024 12:54 pm PST

Pathway: Accounts > User Activity

The User Activity screen monitors and presents the activities of user accounts in an interactive grid for review. This screen offers two view options that modify the displayed content. Filters can be applied to narrow down the returned data to a specific set of users and time frame.



Permissions

The following permissions are required to view the User Activity screen:

Permission ID	Permission Name
65	User Activities, Leads and Opportunities

Filter Descriptions

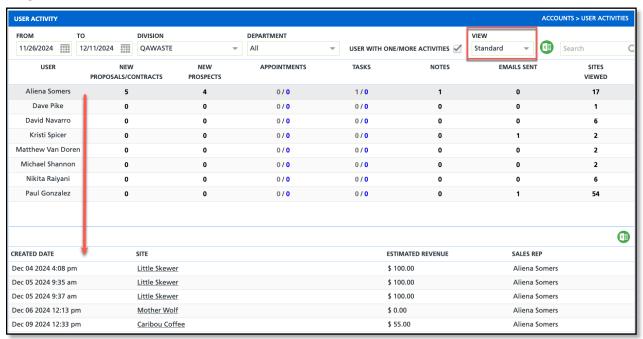
The following descriptions apply to only the filters found on the User Activity screen.

Filter Type	Description
To / From	Creates a date range to limit what displays. Only user accounts with activities falling within the From and To dates entered are shown.
Division	Filter to only see the activities of users of a specific division.
Department	Filters to only display users of the selected department. Departments are assigned to users in their user account.
User With One/Or More Activities	Check the box to filter out user accounts with no user activity to display.
View Services	Changes what is displayed on the screen. User Activities are split between two views, Standard or Services.

Filter Type	Description
Search	Option to search for a specific user.

Standard View Field Descriptions

The Standard view of the User Activity screen allows you to select an activity from a user's row to view its details in the grid at the bottom.



Field Descriptions	Description	
NOTE: Values and the information they contain are specific to the user account.		
User	Displays the name of the user the information applies.	
New Proposals/Contracts	Displays a count of new proposals and contracts created by the associated user account. Select this value to populate the new proposals and contracts in the grid below.	
New Prospects	Displays a count of new prospects created by the associated user account. Select this value to populate the new prospect accounts in the grid below.	
Appointments	Displays a count of pending and completed appointments scheduled for the associated user. Select this value to populate the appointments in the grid below.	
Tasks	Displays a count of pending and completed tasks the user has assigned to them. Select this value to populate the tasks in the grid below.	
Notes	Displays a count of notes the user has added to accounts. Select this value to populate the accounts and see the note in the grid below.	
Emails Sent	Displays a count of emails the user has sent from their Navusoft account. Select the value to view recipient and message details for each email in the lower grid.	
Service Locations Viewed	Displays a count of service locations the viewed by the user's account. Select the value and the service locations will populate in the grid below.	

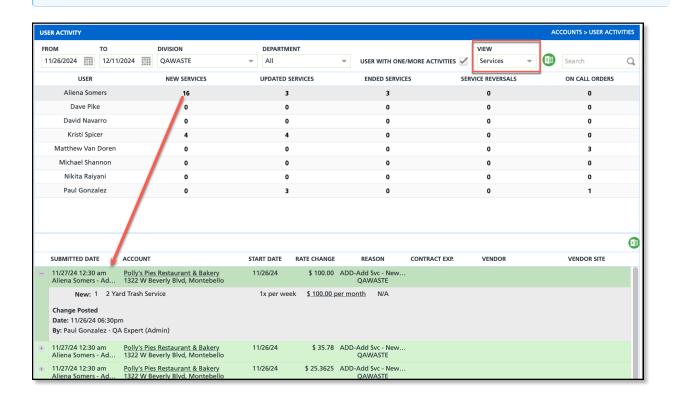
Services View Field Descriptions

The Services view of the User Activity screen allows you to select service related activities from a user's row to view its details in the grid at the bottom.



Services are color coded based on the status of the service.

- New Services display green
- Current Services no color displays
- Ending Services and services on hold-display red



Field Descriptions	Description	
NOTE: Values and the information they contain are specific to the user account.		
User	Displays the name of the user the information applies.	
New Services	Displays a count of new services created by the user. Select the value to view the details of the new service including the customer, the rate and the new service's effective date.	
Updated	Displays a count of services the user has updated. Select the value to view the details of the	
Services	change including the date it was applied, rate changes and the reason for the change.	
Ended	Displays a count of services that have been ended by the associated user account. Select the	
Services	value to view a list of accounts with ended services.	
Service	Displays a count of services reversed by the associated user account. Select the value to view a	
Reversals	timestamp of when services were reversed by the user.	
On Call	Displays a count of On Call Orders created by the associated user account. Select the value to	
Orders	view the status and work order information for the on call orders.	