

User Activities

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Pathway: Accounts > User Activity

The User Activities 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.

USER ACTIVITY							ACCOUNTS > USER ACTIVITIES	
FROM	TO	DIVISION	DEPARTMENT	VIEW				
05/01/2023	05/25/2023	CORPUS, DAYTON, HEARNI	All	Standard		<input checked="" type="checkbox"/> USER WITH ONE/MORE ACTIVITIES <input type="text" value="Search"/>		
USER	NEW PROPOSALS/CONTRACTS	NEW PROSPECTS	APPOINTMENTS	TASKS	NOTES	EMAILS SENT	SITES VIEWED	
Alana Smith	0	0	0 / 0	0 / 0	0	1	11	
David Nelson	0	0	0 / 0	0 / 0	0	2	16	
Dereck Carlson	0	0	0 / 0	0 / 0	0	0	3	
House Account	1	0	0 / 0	0 / 0	0	1	0	
Isabella Nelson	0	0	0 / 0	0 / 0	0	0	7	
Jeff Roberts	1	1	0 / 0	0 / 0	0	1	0	
Candace Owen	0	0	0 / 0	0 / 0	0	0	1	
Laurie Sheldon	1	0	0 / 0	0 / 0	0	1296	106	
Matt lori gmail Eckstrom	13	0	0 / 0	0 / 0	0	6	0	
Matthew Jones	0	0	0 / 0	0 / 0	0	0	9	
Michael Monroe	0	0	0 / 0	0 / 0	0	2	10	
Rob Tenere	4	0	0 / 0	0 / 0	0	1	0	
Test1 User	0	0	0 / 0	0 / 0	0	0	2	

Permissions

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

Permission ID	Permission Name
48	Dashboard Activities in NavuSales

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.

Filter Type	Description
View Services	Changes what is displayed on the screen. User Activities are split between two views, Standard or Services.
Search	Option to search for a specific user.

Standard View Field Descriptions

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

USER ACTIVITY		ACCOUNTS -> USER ACTIVITIES						
FROM	TO	DIVISION	DEPARTMENT	USER WITH ONE/MORE ACTIVITIES		VIEW	Search	
11/01/2023	02/20/2024	CORPUS, DAYTON, HILLSBC	All	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Standard	<input type="text"/>	
USER	NEW PROPOSALS/CONTRACTS	NEW PROSPECTS	APPOINTMENTS	TASKS	NOTES	EMAILS SENT	SITES VIEWED	
Alice Smith	0	0	0 / 0	0 / 0	3064	0	0	
Aliena Somers	3	27	0 / 3	1 / 0	3	13	137	
Barbara Jones	0	0	0 / 0	0 / 0	422	0	0	
Bill Jones	0	0	0 / 0	0 / 0	4	0	0	
Brad Sovich	0	1	0 / 0	0 / 0	0	9	15	
Carolyn McDonald	0	0	0 / 0	0 / 0	4544	0	0	
Chris Fairchild	1	3	0 / 0	2 / 0	0	29	30	
Dave Pike	0	1	0 / 0	0 / 0	0	0	17	
David Navarro	0	1	0 / 0	1 / 0	0	8	68	
Ed Sulek	1	1	0 / 0	0 / 1	0	1	8	
Ferlin Jefferson	0	0	0 / 0	5 / 0	6	0	0	
House Acct non Sys...	15	1	0 / 0	0 / 0	0	1	0	
Janice Berns	0	0	0 / 0	0 / 0	5234	0	0	
APPOINTMENT TIME	SITE	TYPE	SALES REP	STATUS				
Fri Jan 12 2024 9:00 am	Navusoft - Demo	Follow Up	Aliena Somers	COMPLETED				
Fri Feb 9 2024 10:00 am	Navusoft - Demo	Introduction	Aliena Somers	COMPLETED				
Wed Feb 14 2024 9:00 am	Dollar Tree	Account Retention	Aliena Somers	COMPLETED				

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.

Field Descriptions	Description
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.
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 Activities 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

USER ACTIVITY ACCOUNTS > USER ACTIVITIES

FROM: 11/01/2023 TO: 02/20/2024 DIVISION: CORPUS, DAYTON, HILLSBC DEPARTMENT: All USER WITH ONE/MORE ACTIVITIES **VIEW** Services Search

USER	NEW SERVICES	UPDATED SERVICES	ENDED SERVICES	SERVICE REVERSALS	ON CALL ORDERS
Alexis Smith	0	100	0	0	0
Alice Cuevas	0	85	0	0	0
Aliena Somers	40	3	0	0	11
Barbara Jones	0	0	0	0	0
Bill Jones	0	0	0	0	0
Brad Sovich	7	0	0	0	1
Carolyn McDonald	0	4	0	0	0
Chris Fairchild	3	1	0	0	0
Dave Pike	3	3	0	0	1
David Navarro	2	0	0	0	2
Ed Sulek	0	0	0	0	0
Ferlin Jefferson	0	0	0	0	0
House Acct non System	24	2381	9	0	0
Janice Berns	0	10	0	0	0

SUBMITTED DATE	ACCOUNT	START DATE	RATE CHANGE	REASON	CONTRACT EXP.	VENDOR	VENDOR SITE
01/15/24 6:32 pm	The Perk 2222 4th St, White Bear Lake	02/01/24	\$ 60.00	CHG-Price Increase HOUSTON			
01/12/24 8:54 pm	El Tiempo 1234 Hwy 8, Houston	02/01/24	\$ 11.25	CHG-Price Increase HOUSTON			
01/29/24 7:35 pm	Clone Test 2 222 S Hope St, Los Angeles	01/15/24	\$ 100.00	CHG-Service Increase QAWASTE			

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 Services	Displays a count of services the user has updated. Select the value to view the details of the change including the date it was applied, rate changes and the reason for the change.
Ended Services	Displays a count of services that have been ended by the associated user account. Select the value to view a list of accounts with ended services.

Field Descriptions	Description
Service Reversals	Displays a count of services reversed by the associated user account. Select the value to view a timestamp of when services were reversed by the user.
On Call Orders	Displays a count of On Call Orders created by the associated user account. Select the value to view the status and work order information for the on call orders.
