

Custom User Groups - Now Available

Published - 1/10/19 — Good Morning, we've been working on integrating a new feature known as "User Groups" to complement our Merchandising and Field Sales Management service. If you're a client of this service, being able to group and filter and report on users based on pre-defined lists is a welcome new feature. To utilize this feature - we've added a new option within "Manage Your Team" - called "Manage User Groups". See below. Once you click in here you can see and edit existing user groups in the list on the left. Clicking on the name of the group will display the users on the right. Adding a new user group can be done easily as well - simply click on the toolbar button and select the users you'd like to be members of the group. We've added filtering capabilities into the Payroll Time & Mileage filters and reports and notifications for now - but look forward to seeing this functionality expand elsewhere into relevant insight panels and more in the coming weeks!

The screenshot shows the ACME BRICK user interface. The top navigation bar includes the user name "Hi, Joe Jenkins (891)" and the current retailer "Home Depot". The sidebar on the left contains navigation options: Home, Avanalytics Admin, Raw Data Upload, Manage Your Team, Assign Retail Locations, Manage Time & Mileage, Manage Tasks, Notification Messaging, Manage User Groups, and Reporting. The main content area is titled "Manage Custom User Groups" and includes a "Add New User Group" button. Below the title is a description: "Creating custom user groups allows you to utilize them for filtering in reporting and other functionality. Using the interface below, you can manage your custom groups and view account-wide groups. You can also create new groups and, if permitted, allow them to be viewed and used by other users." There is a "Filter Here" input field. Below the input field is a table with columns "Owner", "User Group Name", and "Share?". The table contains one row: "Joe Jenkins", "Joe & Pat", and "N/A". Below the table are "Previous", "1", and "Next" navigation buttons. To the right of the table is the text "Choose a list to the left to view its users here."

Adding A New Group

When adding a new group - you have two options - pick one or more names from list below or if you already have a list in Excel or elsewhere with the users' customerID - you can copy past in the lower portion!



Enter a group name and a list of users customer IDs below separated by commas.

Group Name:

Select Users:

- 5222 - Matt...ntHelper
- 57...
- 57...
- 5771 - John Arc...
- ...
- 57...
- ...
- ...
- ...
- ...
- 5203 - Chad Blackwelder

Customer IDs:

Create Group

Dismiss