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New Feature: Keep Files On Your Users (Literally)

2016-04-12 - Ben Henley - [Σχόλια \(0\)](#) - [Product](#)

It's important to know about your users. DeskPRO already enables you to keep detailed profiles for users and organizations, with notes, contact information, and easy access to past tickets and activity history.

We've added the ability to store files right on CRM records, for quick reference by your agents. It might be the custom software driver you made for a user, a VIP client's biography, a company operating manual, a set of invoices... anything that will improve your service.

The screenshot shows a user profile page in DeskPRO. At the top, there are tabs for 'PROPERTIES' and 'ORGANIZATION'. The 'PROPERTIES' tab is active, showing 'Timezone: Europe/London (GMT +1)' and 'Local Time: Thur, 7th Aug 2014 4:57 pm'. Below this is the 'FILES' section, which has a sub-tab 'ADD FILE' and a list of files. One file is visible: 'YHartwell-Get-Big-Fast.mobi.pdf' with the subtitle 'His autobiography', uploaded by 'Lucida Cram' on 'Thur, 7th Aug 2014'. There are 'delete' and 'edit' links for this file. To the right of the main content, there are partial views of 'ORGANIZATION' (showing 'CEO, Tes') and 'USERGROUPS' (showing 'Registered'). At the bottom, there are tabs for 'NOTES', 'ACTIVITY STREAM', and 'DETAIL'.

When your DeskPRO helpdesk is upgraded to the latest version, you'll see a new **Files** section in user and organization profiles.

The screenshot shows an organization profile page in DeskPRO. At the top, there are tabs for 'MEMBERS' (with a count of 5) and 'TICKETS' (with a count of 1). Below these is a search bar 'Add a person to this organization' with a magnifying glass icon. A list of members is shown, each with a profile picture, name, and position: 'Saifa Auron' (No position set), 'Dan Browdown' (No position set), 'Yossarian Glix' (No position set), 'Yolo Hartwell' (CEO), and 'Quentin Small' (Tester). Each member entry has a speech bubble icon and a red minus sign. Below the members list is the 'FILES' section, which has a sub-tab 'ADD FILE' and a list of files. One file is visible: 'Company-Prospectus.pdf' with the subtitle 'Good info here', uploaded by 'Sam Bibro' on 'Thur, 7th Aug 2014'. There are 'delete' and 'edit' links for this file.