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New Feature: Keep Files On Your Users (Literally)

2016-04-12 - Ben Henley - [Kommentarer \(0\)](#) - [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 interface. 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 count of '1'. A file entry is shown: 'YHartwell-Get-Big-Fast.mobi.pdf' by 'Lucida Cram' on 'Thur, 7th Aug 2014'. The file description is 'His autobiography'. There are 'delete' and 'edit' links for the file. 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 interface. At the top, there are tabs for 'MEMBERS' (count 5) and 'TICKETS' (count 1). Below the tabs is a search bar 'Add a person to this organization'. A list of members is shown: 'Saifa Auron' (No position set), 'Dan Browdown' (No position set), 'Yossarian Glix' (No position set), 'Yolo Hartwell' (CEO), and 'Quentin Small' (Tester). Each member has a profile picture, name, position, and a red minus icon. Below the members list is the 'FILES' section, which has a sub-tab 'ADD FILE' and a count of '1'. A file entry is shown: 'Company-Prospectus.pdf' by 'Sam Bibro' on 'Thur, 7th Aug 2014'. The file description is 'Good info here'. There are 'delete' and 'edit' links for the file.