

Users List

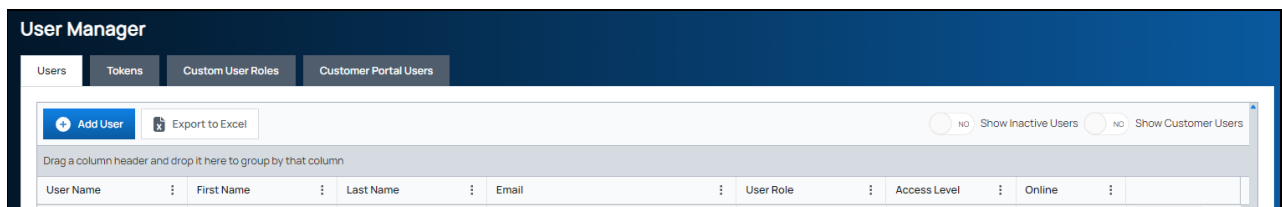
Last Modified on 01/08/2026 11:03 am EST

There are several tools available to manage the list of users.

- Export to Excel
- Filter by active or inactive users
- Filter by internal users or customer users
- Sort by any column in the grid
- Column grouping
- Arrange grid column order by drag and drop
- Open the menu (to the right of the column name) to sort, hide, show columns, or filter

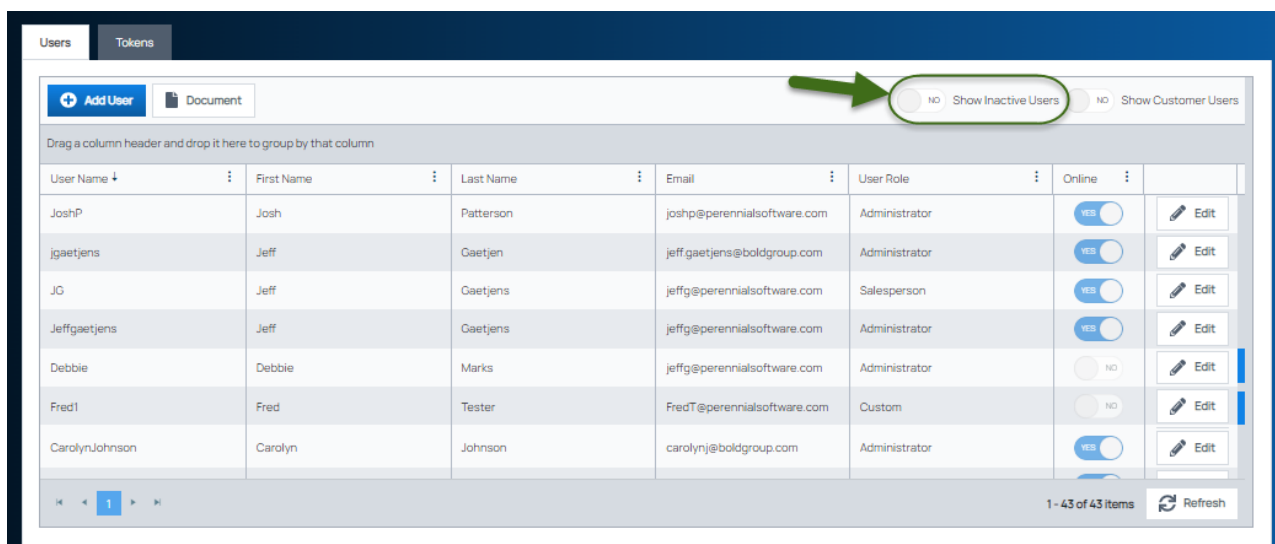
Export to Excel

Click the Export to Excel button to export the users shown on all grid pages to one spreadsheet. In the spreadsheet, the users are in the order shown on the grids with column headings for the visible columns on the grid.



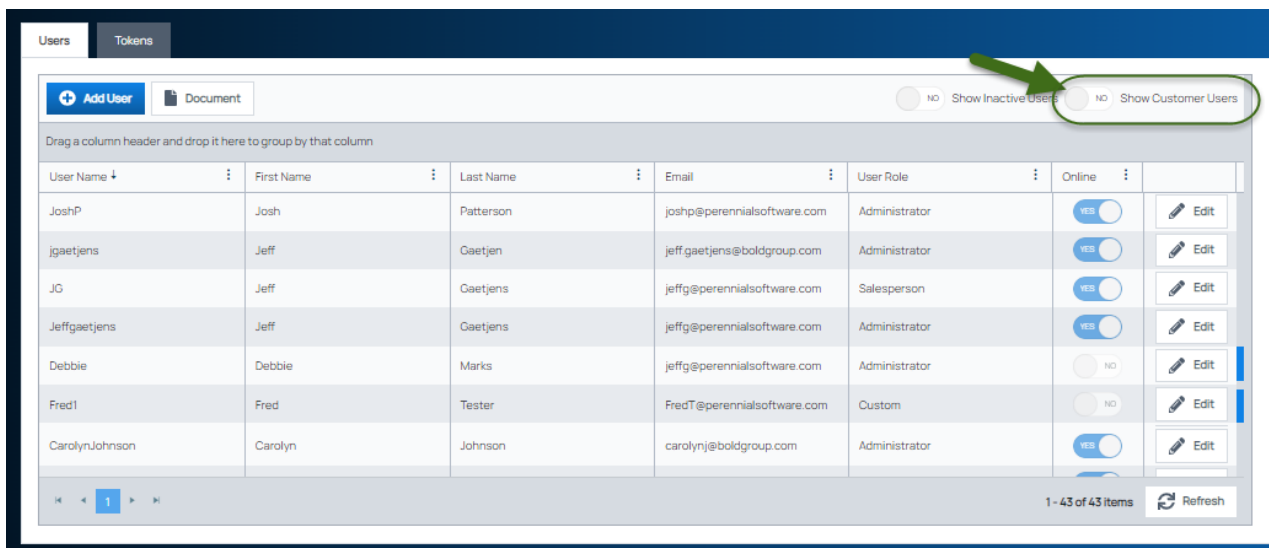
Filter by Active or Inactive

At the upper right of the list is a toggle button that you can use to show active only or inactive only records.



Filter by User Type

At the upper right of the list is a toggle button that you can use to show internal users only or customer users only.



Users Tokens

[Add User](#) [Document](#)

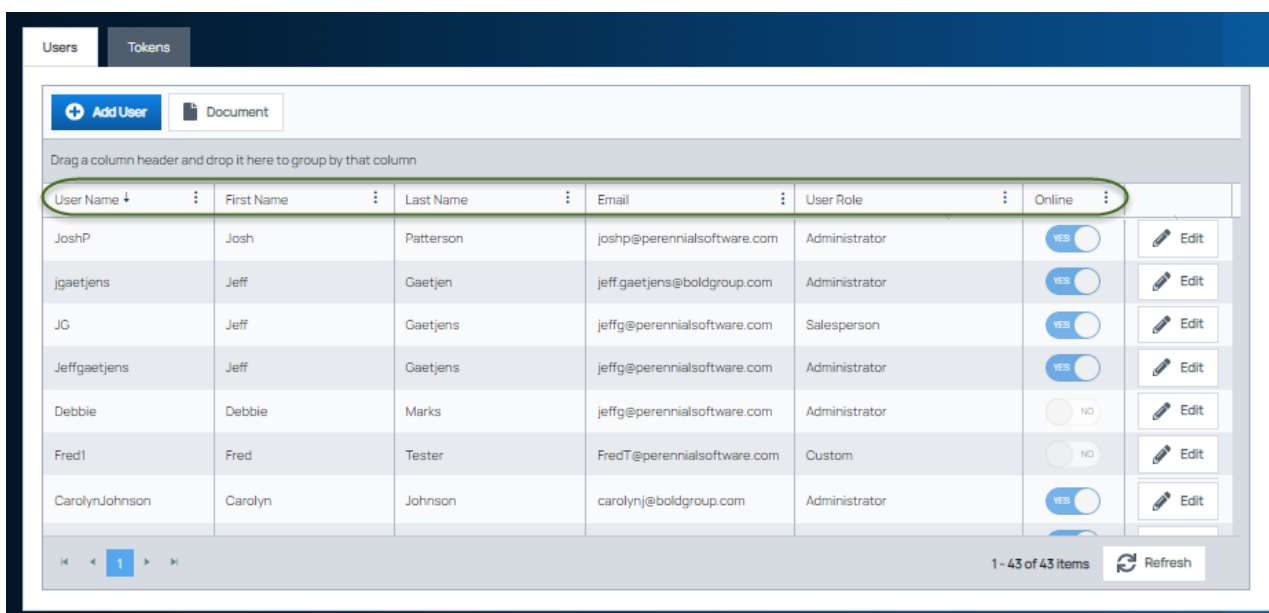
Drag a column header and drop it here to group by that column

User Name	First Name	Last Name	Email	User Role	Online	
JoshP	Josh	Patterson	joshp@perennialsoftware.com	Administrator	<input checked="" type="checkbox"/>	Edit
jgaetjens	Jeff	Gaetjen	jeff.gaetjens@boldgroup.com	Administrator	<input checked="" type="checkbox"/>	Edit
JG	Jeff	Gaetjens	jeffg@perennialsoftware.com	Salesperson	<input checked="" type="checkbox"/>	Edit
Jeffgaetjens	Jeff	Gaetjens	jeffg@perennialsoftware.com	Administrator	<input checked="" type="checkbox"/>	Edit
Debbie	Debbie	Marks	jeffg@perennialsoftware.com	Administrator	<input type="checkbox"/>	Edit
Fred1	Fred	Tester	FredT@perennialsoftware.com	Custom	<input type="checkbox"/>	Edit
CarolynJohnson	Carolyn	Johnson	carolynj@boldgroup.com	Administrator	<input checked="" type="checkbox"/>	Edit

1 - 43 of 43 items [Refresh](#)

Sort by Column

Clicking on any column header within the user list re-sorts the information displayed in the grid. When first accessing the user list, the information displayed in the grid shows each user in the order in which they were created. Clicking on a column header sorts the list in ascending order. Clicking a second time sorts in descending order, and clicking a third time returns to the initial view.



Users Tokens

[Add User](#) [Document](#)

Drag a column header and drop it here to group by that column

User Name	First Name	Last Name	Email	User Role	Online	
JoshP	Josh	Patterson	joshp@perennialsoftware.com	Administrator	<input checked="" type="checkbox"/>	Edit
jgaetjens	Jeff	Gaetjen	jeff.gaetjens@boldgroup.com	Administrator	<input checked="" type="checkbox"/>	Edit
JG	Jeff	Gaetjens	jeffg@perennialsoftware.com	Salesperson	<input checked="" type="checkbox"/>	Edit
Jeffgaetjens	Jeff	Gaetjens	jeffg@perennialsoftware.com	Administrator	<input checked="" type="checkbox"/>	Edit
Debbie	Debbie	Marks	jeffg@perennialsoftware.com	Administrator	<input type="checkbox"/>	Edit
Fred1	Fred	Tester	FredT@perennialsoftware.com	Custom	<input type="checkbox"/>	Edit
CarolynJohnson	Carolyn	Johnson	carolynj@boldgroup.com	Administrator	<input checked="" type="checkbox"/>	Edit

1 - 43 of 43 items [Refresh](#)

Column Grouping

Users can group the data displayed in the grid by one or multiple columns within the grid.

To group the data, hold the left mouse button down on the column you want to group by, and then drag up into the grouping bar and release the mouse button.

User Manager

Users Tokens

[Add User](#) [Document](#) ☐ NO Show Inactive Users ☐ NO Show Customer Users

Drag a column header and drop it here to group by that column [+ User Role](#)

User Name	First Name	Last Name	Email	User Role	Online	
bestsecurity	Travis	Papay	papayt@gmail.com	Administrator	<input checked="" type="checkbox"/>	Edit
Michael	Michael	Marks	michael@alarmbill.com	Administrator	<input type="checkbox"/>	Edit
Luke	Luke	Marks	mkmmarks@me.com	Custom	<input type="checkbox"/>	Edit
Debbie	Debbie	Marks	jeffg@perennialssoftware.com	Administrator	<input type="checkbox"/>	Edit
aprlm@perennialssoftware.com	Drew	Jones	aprlm@perennialssoftware.com	Customer	<input type="checkbox"/>	Edit
Natasha	Natasha	Papay	papayt@gmail.com	Administrator	<input type="checkbox"/>	Edit
papayt@gmail.com	Travis	Papay	papayt@gmail.com	Customer	<input type="checkbox"/>	Edit
tech	John	Smith	papayt@gmail.com	Technician	<input checked="" type="checkbox"/>	Edit
rebeccadoc	Rebecca	Hall	rebecca.ann59@gmail.com	Administrator	<input checked="" type="checkbox"/>	Edit

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In the example, we are grouping by User Role. When you want to remove the grouping, click the "X" of the grouping column name on the grouping bar.

User Manager

Users Tokens

[Add User](#) [Document](#) ☐ NO Show Inactive Users ☐ NO Show Customer Users

[+ User Role](#) X

▼ User Role: Manager

Manager	Jman	Gman	jeffg@perennialssoftware...	Manager	<input type="checkbox"/>	Edit
Fred5	Fred5	Tester	fred@perennialssoftware.c...	Manager	<input type="checkbox"/>	Edit
AppleReview	Apple	Inc	noreply@apple.com	Manager	<input checked="" type="checkbox"/>	Edit
bradswindell	Brad	Swindell	brads@optbusinessservic...	Manager	<input checked="" type="checkbox"/>	Edit

▼ User Role: Salesperson

JG	Jeff	Gaetjens	jeffg@perennialssoftware...	Salesperson	<input checked="" type="checkbox"/>	Edit
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▼ User Role: Technician

tech	John	Smith	papayt@gmail.com	Technician	<input checked="" type="checkbox"/>	Edit
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1 - 44 of 44 items [Refresh](#)

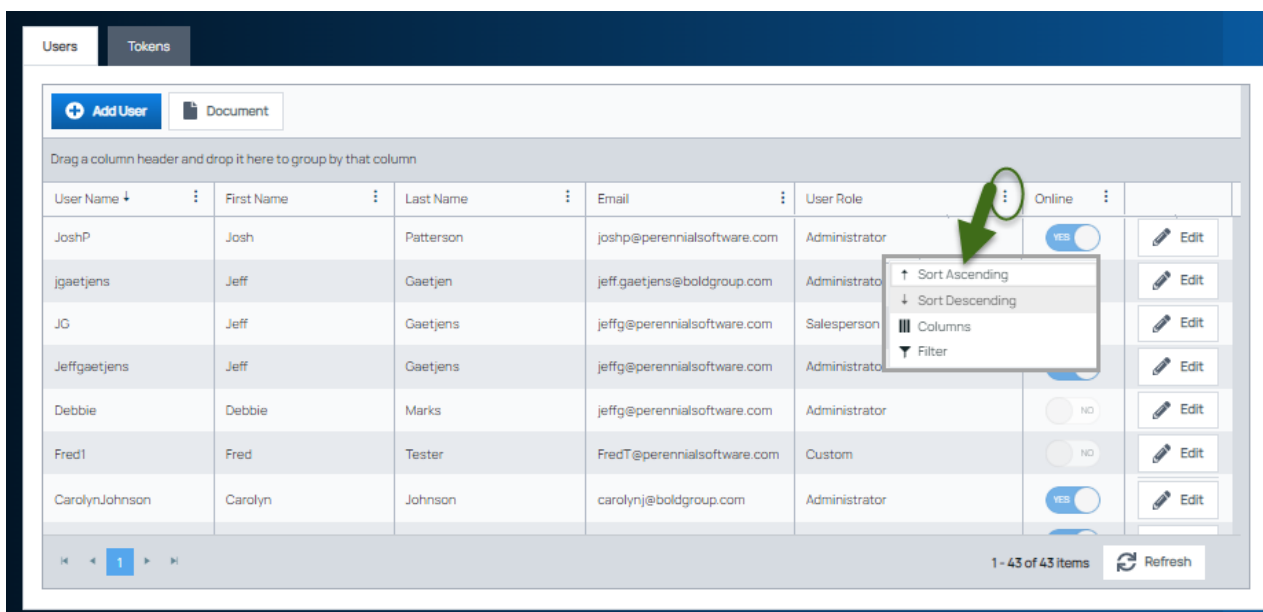
Arrange Grid Columns

Users can rearrange the columns in the desired order by using drag and drop. To move a column: on the column you want to move, hold down the left mouse button, and then drag to the new location and release the mouse button.

Note: If you leave this page and return again, the columns will revert to the default order.

Column Options

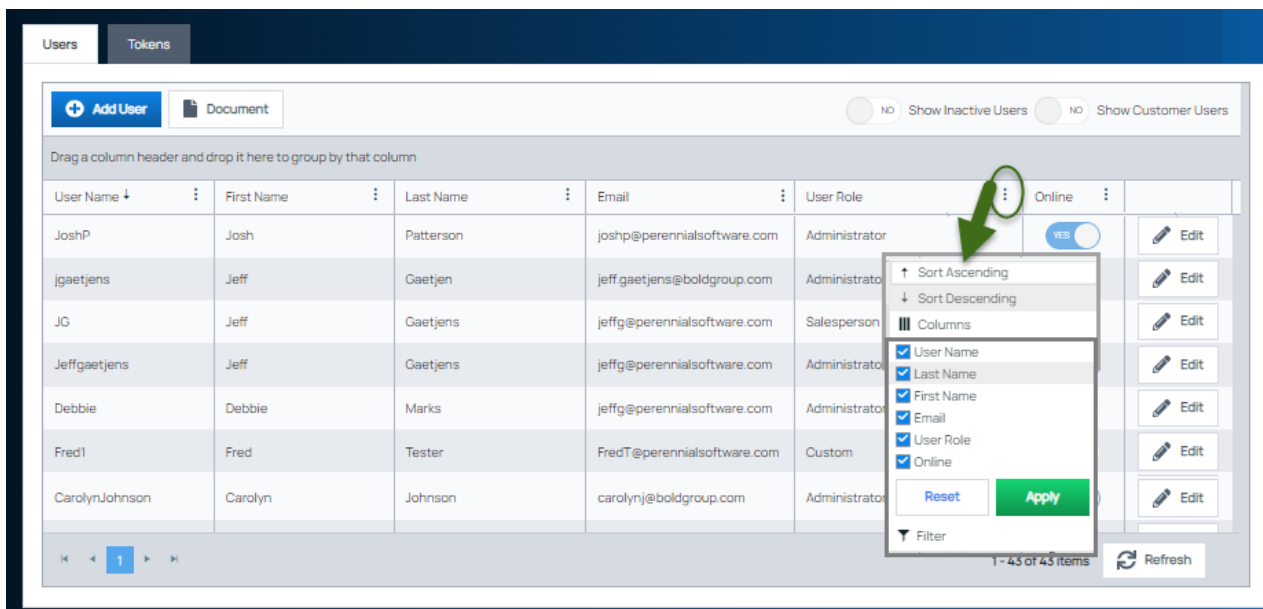
Clicking on the ellipse button to the right of any column header displays a list of four options: Sort Ascending, Sort Descending, Columns, and Filter.



Columns

When selecting this option, a list of all available columns is displayed. If you do not want certain columns displayed in the grid, clear the checkbox to the left of each field. Click the Apply button when finished.

Note: If you leave this page and return again, the columns will revert to the default view.



Filter

Use this option to refine the list displayed in the grid. When clicking on Filter, a dialog box will be displayed for entering criteria to find the records you want to display. The first field contains a drop-down list from which to select an operator. The list of available operators is:

- Is equal to

- Is not equal to
- Contains
- Does not contain
- Starts with
- Ends with
- Is null
- Is not null
- Is empty
- Is not empty

Select the desired operator, and then enter the criteria into the field below it. Click Filter when finished. The list will refresh based on the filter criteria entered.

Note: If you leave this page and return again, any filters created will be removed.

The screenshot shows the 'Users' tab in a software interface. A table lists users with columns: User Name, First Name, Last Name, Email, User Role, Online, and an Edit button. A filter dropdown menu is open, showing operators like 'Contains', 'Is equal to', 'Is not equal to', etc. A green arrow points to the 'Filter' button at the bottom right of the dropdown.

User Name	First Name	Last Name	Email	User Role	Online	Edit
JoshP	Josh	Patterson	joshp@perennialsoftware.com	Administrator	Yes	Edit
jgaetjens	Jeff	Gaetjen	jeff.gaetjens@holdgroup.com	Administrator		Edit
JG	Jeff	Gaetjens		Salesperson		Edit
Jeffgaetjens	Jeff	Gaetjens		Administrator		Edit
Debbie	Debbie	Marks		Administrator		Edit
Fred1	Fred	Tester		Custom		Edit
CarolynJohnson	Carolyn	Johnson		Administrator		Edit

Tokens

Listed on the Tokens tab, are API tokens that log activity made by users while using integrations. This information is typically used by our support staff to troubleshoot any errors from the use of an integrated product.

The screenshot shows the 'User Manager' interface with the 'Tokens' tab selected. A table lists API tokens with columns: User Id, User Name, Client, Expires, Status, and a Revoke button. The status column shows 'Expired' (red) and 'Active' (green) tokens.

User Id	User Name	Client	Expires	Status	Revoke
4	bestsecurity	sedonaonemobile	Mar 3, 2022, 8:16:46 PM	Expired	Revoke
4	bestsecurity	sedonaonemobile	Mar 25, 2022, 5:43:42 PM	Active	Revoke
4	bestsecurity	sedonaonemobile	Mar 26, 2022, 12:25:41 AM	Active	Revoke
4	bestsecurity	sedonaonemobile	Mar 9, 2022, 2:44:32 PM	Expired	Revoke
4	bestsecurity	sedonaonemobile	Mar 2, 2022, 1:40:30 PM	Expired	Revoke
4	bestsecurity	sedonaonemobile	Feb 22, 2022, 6:46:41 PM	Expired	Revoke
4	bestsecurity	sedonaonemobile	Mar 10, 2022, 5:37:17 PM	Expired	Revoke

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