

# Users List

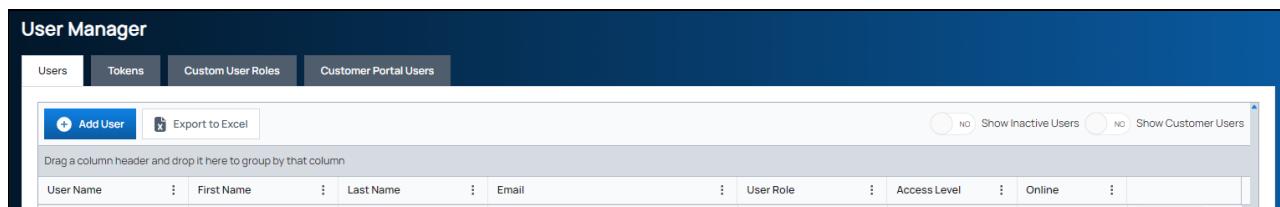
Last Modified on 01/08/2026 11:03 am EST

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

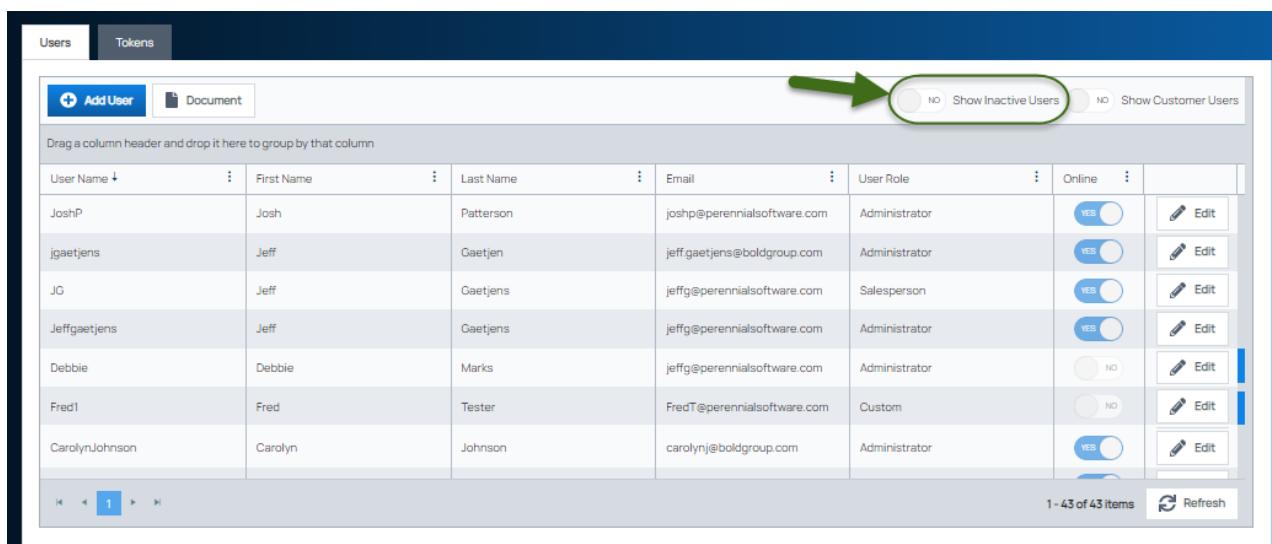
Click the Export to Excel button to export the users shown on all grid pages to one spreadsheet. In the spreadsheet, the users are in the order shown on the grids with column headings for the visible columns on the grid.



The screenshot shows the 'User Manager' interface with the 'Users' tab selected. At the top, there are buttons for 'Add User', 'Tokens', 'Custom User Roles', and 'Customer Portal Users'. Below these is a search bar with 'Export to Excel' and a 'Show Inactive Users' toggle button. The main area is a grid with columns: User Name, First Name, Last Name, Email, User Role, Access Level, Online, and a series of edit icons. A tooltip indicates that you can drag a column header to group by that column.

## Filter by Active or Inactive

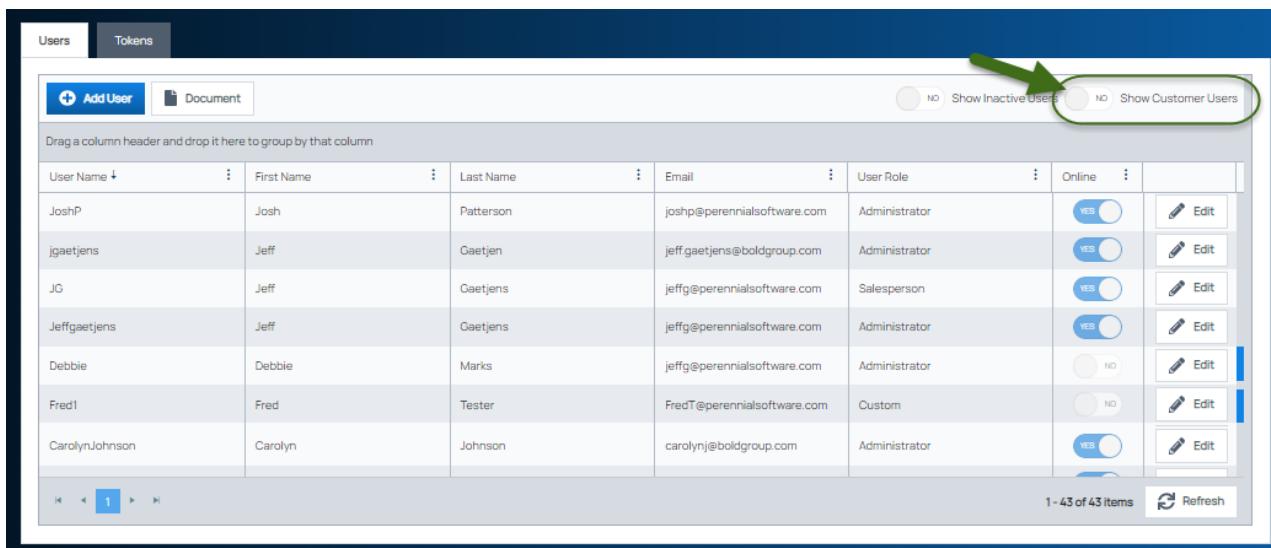
At the upper right of the list is a toggle button that you can use to show active only or inactive only records.



The screenshot shows the 'User Manager' interface with the 'Users' tab selected. At the top, there are buttons for 'Add User', 'Tokens', and a document icon. Below these is a search bar with 'Document' and a 'Show Inactive Users' toggle button, which is highlighted with a green arrow. The main area is a grid with columns: User Name, First Name, Last Name, Email, User Role, Online, and a series of edit icons. A tooltip indicates that you can drag a column header to group by that column. The grid shows several user entries with various roles and online status.

## Filter by User Type

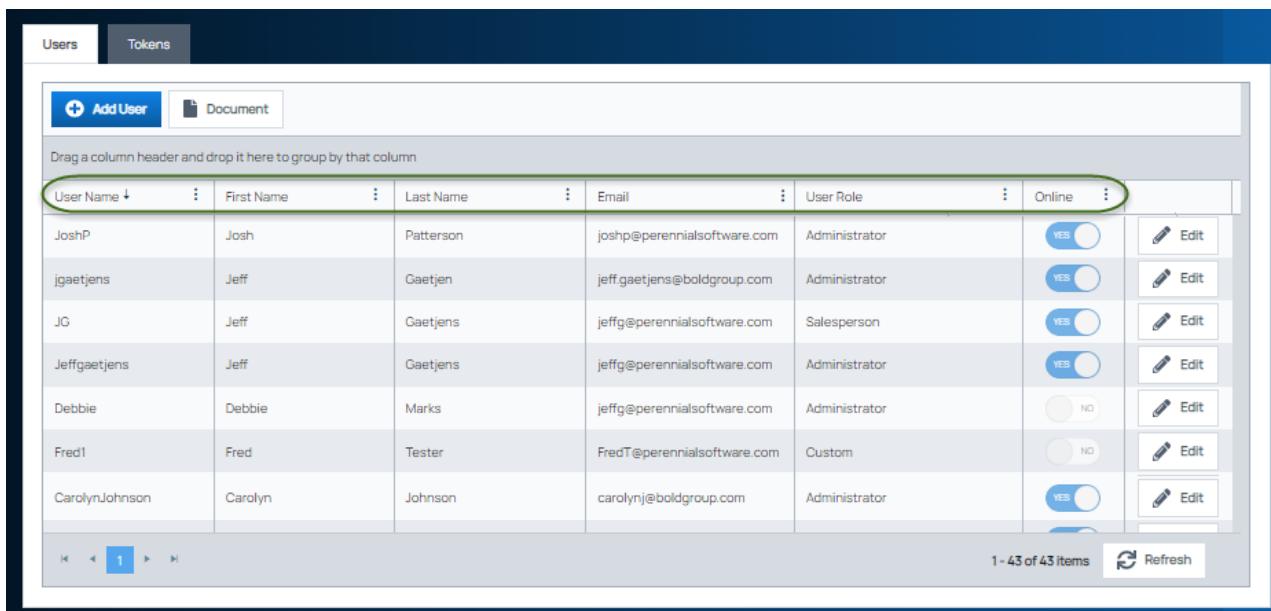
At the upper right of the list is a toggle button that you can use to show internal users only or customer users only.



Users		Tokens							
<a href="#">Add User</a>		<a href="#">Document</a>							
Drag a column header and drop it here to group by that column									
User Name		First Name		Last Name		Email		User Role	
JoshP		Josh		Patterson		joshp@perennialsoftware.com		Administrator	
jgaetjens		Jeff		Gaetjen		jeff.gaejtens@boldgroup.com		Administrator	
JG		Jeff		Gaetjens		jeffg@perennialsoftware.com		Salesperson	
Jeffgaetjens		Jeff		Gaetjens		jeffg@perennialsoftware.com		Administrator	
Debbie		Debbie		Marks		jeffg@perennialsoftware.com		Administrator	
Fred1		Fred		Tester		FredT@perennialsoftware.com		Custom	
CarolynJohnson		Carolyn		Johnson		carolynj@boldgroup.com		Administrator	
<a href="#">Edit</a>		<a href="#">Edit</a>		<a href="#">Edit</a>		<a href="#">Edit</a>		<a href="#">Edit</a>	
<a href="#">Edit</a>		<a href="#">Edit</a>		<a href="#">Edit</a>		<a href="#">Edit</a>		<a href="#">Edit</a>	
<a href="#">Edit</a>		<a href="#">Edit</a>		<a href="#">Edit</a>		<a href="#">Edit</a>		<a href="#">Edit</a>	
1 - 43 of 43 items <a href="#">Refresh</a>									

## 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							
<a href="#">Add User</a>		<a href="#">Document</a>							
Drag a column header and drop it here to group by that column									
User Name		First Name		Last Name		Email		User Role	
JoshP		Josh		Patterson		joshp@perennialsoftware.com		Administrator	
jgaetjens		Jeff		Gaetjen		jeff.gaejtens@boldgroup.com		Administrator	
JG		Jeff		Gaetjens		jeffg@perennialsoftware.com		Salesperson	
Jeffgaetjens		Jeff		Gaetjens		jeffg@perennialsoftware.com		Administrator	
Debbie		Debbie		Marks		jeffg@perennialsoftware.com		Administrator	
Fred1		Fred		Tester		FredT@perennialsoftware.com		Custom	
CarolynJohnson		Carolyn		Johnson		carolynj@boldgroup.com		Administrator	
<a href="#">Edit</a>		<a href="#">Edit</a>		<a href="#">Edit</a>		<a href="#">Edit</a>		<a href="#">Edit</a>	
<a href="#">Edit</a>		<a href="#">Edit</a>		<a href="#">Edit</a>		<a href="#">Edit</a>		<a href="#">Edit</a>	
<a href="#">Edit</a>		<a href="#">Edit</a>		<a href="#">Edit</a>		<a href="#">Edit</a>		<a href="#">Edit</a>	
1 - 43 of 43 items <a href="#">Refresh</a>									

## 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

Show Inactive Users Show Customer Users

User Name First Name Last Name Email User Role Online

bestsecurity Travis Papay papayt@gmail.com Administrator YES Edit

Michael Michael Marks michael@alarmbiller.com Administrator NO Edit

Luke Luke Marks mkmarks@me.com Custom NO Edit

Debbie Debbie Marks jeffg@perennialsoftware.com Administrator NO Edit

aprilm@perennialsoftware.com Drew Jones aprilm@perennialsoftware.com Customer NO Edit

Natasha Natasha Papay papayt@gmail.com Administrator NO Edit

papayt@gmail.com Travis Papay papayt@gmail.com Customer NO Edit

tech John Smith papayt@gmail.com Technician YES Edit

rebeccadoc Rebecca Hall rebecca.ann59@gmail.com Administrator YES Edit

1 - 44 of 44 items Refresh

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

Show Inactive Users Show Customer Users

User Name First Name Last Name Email User Role Online

**User Role** X

**User Role: Manager**

Manager Jman Gman jeffg@perennialsoftware... Manager NO Edit

Fred5 Fred5 Tester fred@perennialsoftware.c... Manager NO Edit

AppleReview Apple Inc noreply@apple.com Manager YES Edit

bradswindell Brad Swindell brads@optbusinessservic... Manager YES Edit

**User Role: Salesperson**

JG Jeff Caetjens jeffg@perennialsoftware... Salesperson YES Edit

**User Role: Technician**

tech John Smith papayt@gmail.com Technician YES Edit

1 - 44 of 44 items Refresh

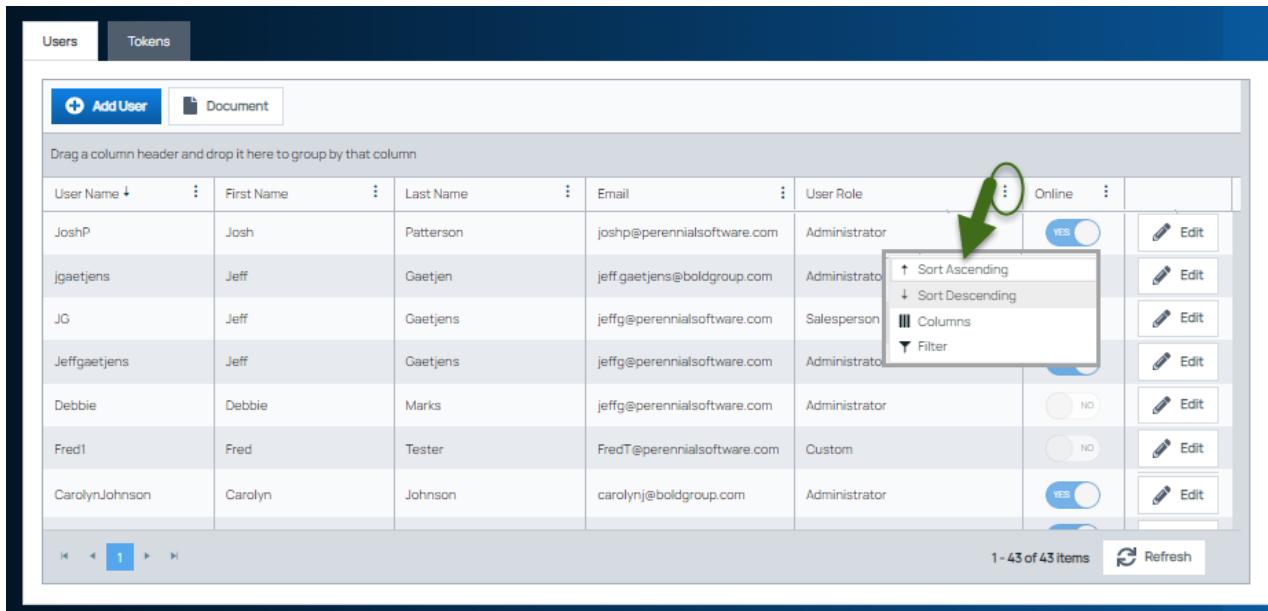
## Arrange Grid Columns

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.

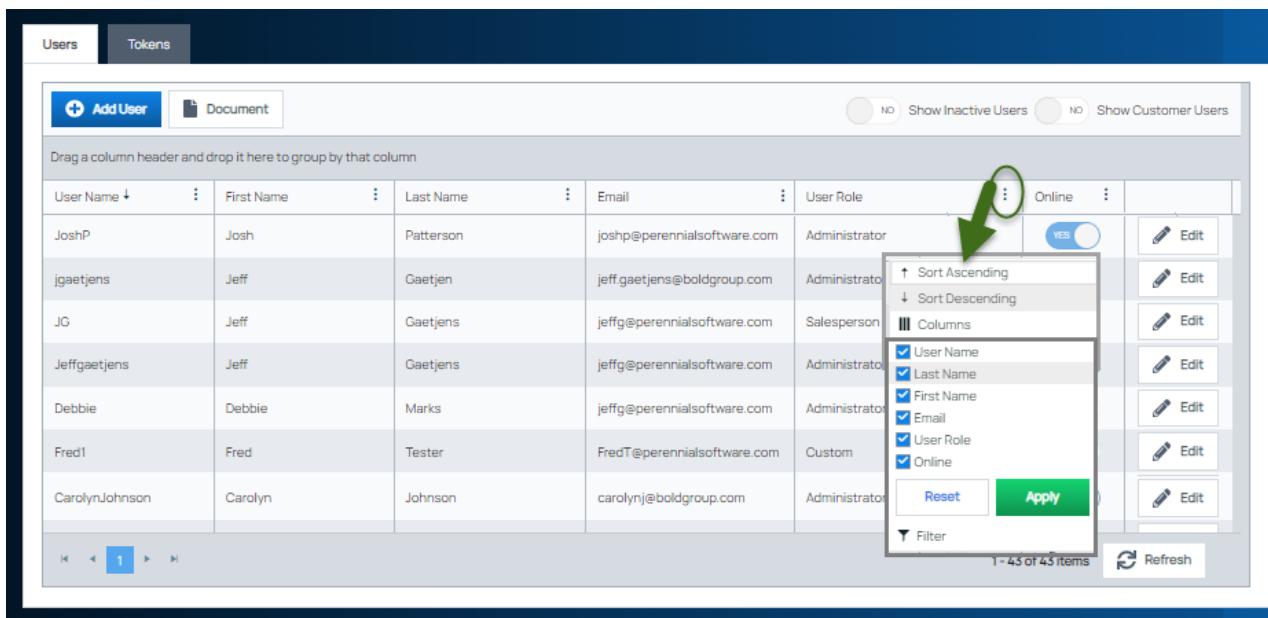


A screenshot of the BoldGrid interface showing a list of users. The 'User Role' column header has an ellipsis button (three vertical dots) to its right. A context menu is open over this button, containing the following options: 'Sort Ascending' (with an upward arrow icon), 'Sort Descending' (with a downward arrow icon), 'Columns' (with a grid icon), and 'Filter' (with a magnifying glass icon). A green arrow points from the text 'Clicking on the ellipse button to the right of any column header displays a list of four options' to the 'Columns' option in the menu.

## 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.



A screenshot of the BoldGrid interface showing a list of users. The 'User Role' column header has an ellipsis button to its right, and a context menu is open. The 'Columns' option is selected, and a list of all available columns is displayed with checkboxes to the left of each column name. The columns listed are: 'User Name' (checked), 'Last Name' (checked), 'First Name' (checked), 'Email' (checked), 'User Role' (checked), and 'Online' (checked). At the bottom of this list are 'Reset' and 'Apply' buttons. The 'Apply' button is highlighted with a green arrow. A green arrow also points from the text 'If you do not want certain columns displayed in the grid, clear the checkbox to the left of each field' to the 'Columns' option in the menu.

## 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 of the User Manager. A filter dialog is open over the 'User Name' column. The 'Contains' operator is selected in the dropdown. A green arrow points from the 'Contains' option in the dropdown to the 'Contains' field in the filter dialog. Another green arrow points from the 'Filter' button in the dialog to the 'Filter' button in the top right of the table.

## 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. The table lists tokens for user 'bestsecurity' with columns for User Id, User Name, Client, Expires, Status, and Revocation buttons. A green arrow points from the 'Tokens' tab in the screenshot above to the 'Tokens' tab in this screenshot.

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.

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