Users and Contacts

(7.0.5)

Zenario includes a Users module, which allows it to store data on users and contacts in its database.

"Contacts" may be gathered from a website visitor filling in his details on a form - for example, a website enquiry form, or a sign-up form for a newsletter.

Data on "Users" goes beyond that; if your site has a password-protected area (sometimes called an extranet) then the people who are permitted to log in to that area are called "Users". Zenario has many tools for managing extranet areas, such as registration forms, login forms, and so on.

An extranet can be the basis for a highly personalised experience; for example, Zenario can support:

❖ Controlled access to web pages and documents on the basis of a user account or membership of a group

❖ The issuing of confidential documents to specific users

❖ Linking users with locations and companies

❖ User timers to maintain memberships for a controlled period of time

❖ Searchable profiles of users, additional data fields, and much more.

This chapter introduces the basic management tools, including the Organizer-based administration with which you can create, edit and delete users and contacts.
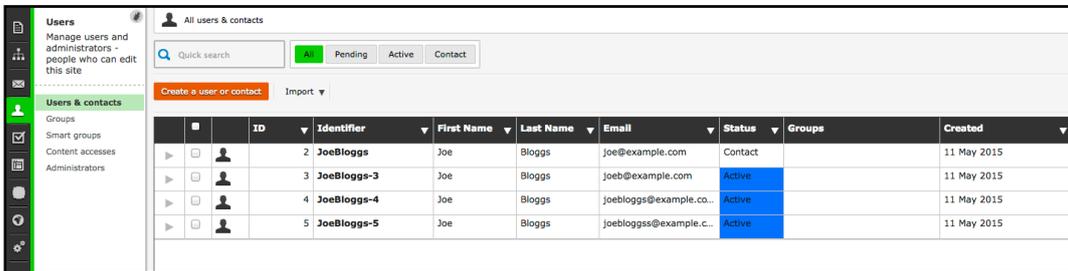
How to manage Users and Contacts

Manage your Users and Contacts in Organizer by clicking on the [icon] icon.

> **Note**
>
> *Extranet modules and therefore Users are only available in ProBusiness and Enterprise editions of Zenario.*

Assuming that your site already has users and contacts, you should see a screen similar to this:

Note the 'status' of each person. It can be one of: Contact, Active, Pending and Suspended.

Contacts arise from entering data on a website that is not password protected. You can send things such as newsletters to these contacts as well as export their details onto an external mailing system.

The Active, Pending and Suspended statuses refer to extranet Users. Active means that a User has completed the sign up process and can use the login system. A pending User has a few meanings, firstly it might mean that a User has not verified their account by clicking on a link they have been emailed (when they do they will become active) or you can choose to make all Users who sign up as pending and verify them manually by chosen site administrators.

It's also possible to activate multiple pending Users at once and send them a welcome email for example.

> **Note**
>
> *There is a fourth status called 'Suspended', which means a user can no longer log in, but whose details are still on the system. To view suspended users click* 🗑 *at the extreme bottom right on the Organizer screen.*

As a site admin you are able to impersonate a User in order to see what that User will see when logged into your website.

To do this click on the User profile and click "Impersonate user".

You can choose wether to maintain your admin log in status or log out and impersonate.

Extranet Users

It is not possible for a User to create more than one account with the same email address, as email addresses are unique. The Users also use their email address to login and to recover a lost password.

Passwords are automatically generated if needed or are chosen by the User. As an admin you can generate and send a new one to them, as well as revealing the password to check login details. There's an option available for when a user next logs in, to make them change their password.

There are several User options that can be changed on a site wide basis. To enable go to Organizer > Configuration > Site settings > Users
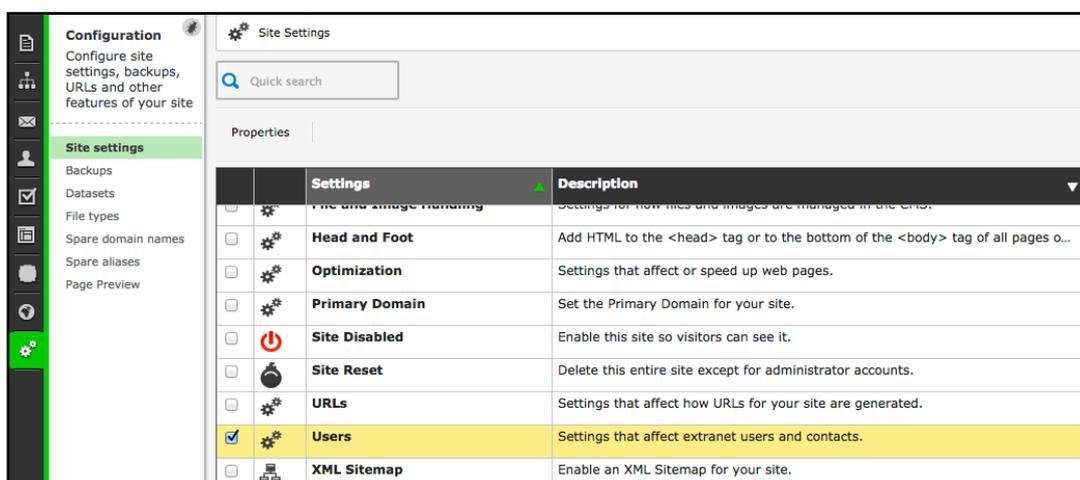
Click 'Users' and then properties and a pop-up box with various options will appear.
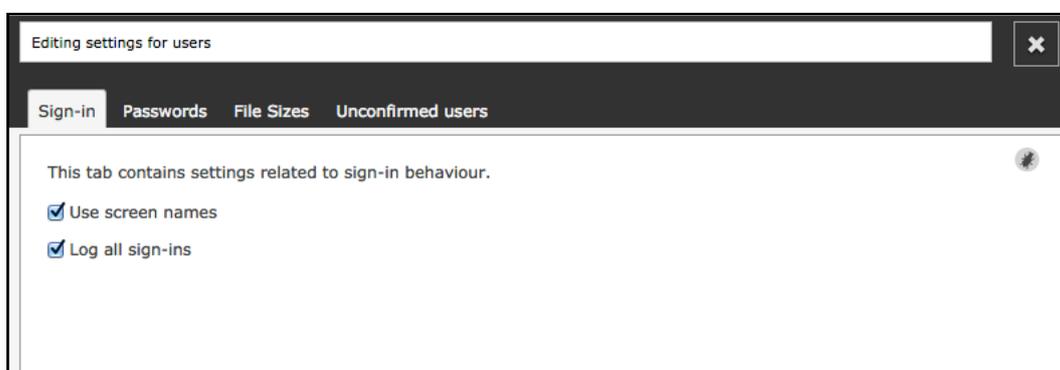
Here you can choose if you want Users to choose a screen name when signing up, these can be used for any forums and comment ares.

On the next tab you can choose whether the User's passwords are stored as plain text or encrypted, minimum password length and the strength of password needed.

The file size for file uploads is set on the next tab and then finally the "Unconfirmed users" tab will allow you to tell the system to delete pending Users after a certain amount of days on inactivity. This helps to stop fake profiles from cluttering the data.

> ## Note
> *Users can be set in groups for emailing and data selection purposes. Additional fields can also be added to the users data for example adding in a company name or country of residence.To be able to do this you must create new datasets and link them to users. Please refer to the 'Datasets' guide to learn more on the topic.*