

SuiteCRM User Activity Tracker (Lite)

# **User Guide**

**Activity Tracker** 

Outright

**1.** Go to admin panel and click on user activity config option.

☆ ADMINISTRATION	SALES	MARKETING SUPPOR	T ACTIVITIES	COLLABORATION	ALL	CREATE 👻 🔍	(₽) @ admin ▼
Recently Viewed	⊲	Maintain a list of releases for yo	our product. Active rei	eases are displayed in the Ke	lieases drop-down menus in bug records created within t	the Bugs module.	
admin		Releases		Manage releases and vers	sions		
test	1	User Activity tracker from C	utright Store				
admin	1	User Activity tracker from Out	ight Store				
admin	1	Activity Day Summary		->SEE DAYWISE SUMMA	ARY OF USERS		
admin	1	Activity Holder		See User's Full day activit	ies		
		User Activity Config C	lick here	See All Inbound Settings			

**2.** Here switch on the product and assign it to a user.

TEST2 » ED	IT VIEW CHANGE LOG			< previous (1 of 1) NEXT >
BASIC				-
Name:* Product Switch:	test2	Assigned to:	test	R X
Description:				
				li li

**3.** In the admin panel click on activity day summary option.

♠ ADMINISTRATION	SALES	MARKETING	SUPPORT	ACTIVITIES	COLLABORATION	ALL		CRE	ате 🕶 🔍	( <del>4</del> )	admin 🗸
Recently Viewed	⊲	Maintain a list of re	eleases for your (	broduct. Active rel	eases are displayed in the Ke	eeases drop-down	menus in bug records cre	eated within the Bugs mo	dule.		
admin	1	Releases			Manage releases and vers	lions					
test	1	User Activity trad	cker from Outr	ight Store							
admin	1	Oser Activity track	er from Outrign	L Store							
admin	1	Activity Day Su	mmary		->SEE DAYWISE SUMMA	RY OF USERS					
admin	1	Activity Holder			See User's Full day activit	les					
		User Activity Co	onfig		See All Inbound Settings						

**4.** Right now there are no records related to user activity.



#### **Activity Tracker**

Outright

**5.** Logout the test user.

SALES MARKETING SUP	PPORT ACTIVITIES COLLABORATION ALL			CREATE 🔻 🔍	
Recently Viewed					Profile
	SUITECRM DASHBOARD				Employees
test2 🧪					Support Forum
	Se MY CALLS	10×	A MY ACTIVITY STREAM		About
		💽 💽 (0 - 0 of 0)		TACK	Lisout
	Close Subject $\Leftrightarrow$ Related to Start Date $\Leftrightarrow$	Accept? Status 🕀	♦ test 2	-051	
	No Data			K 🕥 (0 - 0 c	of.0)

## 6. Click on the name of the user.



### **Activity Tracker**

## 7. The user activity is updated in day summary report.

UNDEFINED 1								-	
Date Crea	ted: 0	5/18/202102.13pm		Dat	e Modified: 0	5/18/2021 02.13pm			
ACTIVITY H	OLDER	_	-	_	_	_	-	-	
Name 🕀	Activity type 🕀	Page Module 🚔	Record ID ⇔	Page visited time $\Leftrightarrow$	Operating System	🗢 IP Address 🗢	Country: 🔶	Device 🔶	Brows
Create									
test	Logout	Users		05/18/2021 09.13am	Windows NT 6.1; Wi x64;	n64; 106.215.203.190	India	Desktop	Mozilla

8. Login using the test SuiteCRM account.



9. The login attempt is also recorded in user activity.

ACTIVITY H	ACTIVITY HOLDER -										
Name 🕀	Activity type 🕀	Page Module ⇔	Record ID $\ominus$	Page visited time $\stackrel{\Leftrightarrow}{\Rightarrow}$	Operating System 🔶	IP Address ⇔	Country: 🔶	Device 🕀			
Create											
test	Authenticate	Users		05/18/2021 09.14am	Windows NT 6.1; Win64; x64;	106.215.203.190	India	Desktop	1		
test	Logout	Users		05/18/2021 09.13am	Windows NT 6.1; Win64; x64;	106.215.203.190	India	Desktop	1		

**10.** Go to the Contacts module.



**11.** The activity we done are saved in activity holder.

ACTIVITY H	IOLDER								-
Name 🕀	Activity ty	pe⇔	Page Module 🕀	Record ID 🕀	Page visited time $\oplus$	Operating System 🔶	IP Address $\ominus$	Country: 🕀	Device 🕀
Create									
test	Authenticate	i.	Users		05/18/2021 09.14am	Windows NT 6.1; Win64; x64;	106.215.203.190	India	Desktop
test	index	B	Contacts		05/18/202109.15am	Windows NT 6.1; Win64; x64;	106.215.203.190	India	Desktop
test	Logout		Users		05/18/2021 09.13am	Windows NT 6.1; Win64; x64;	106.215.203.190	India	Desktop

**12.** Now create a record in the contact module.

CONTACTS SALES MA	RKETING SUPPORT	ACTIVITIES COLLABORATION	ALL		CREATE 🔻 🔍	
+ Create Contact	⊲					
E Create Contact From vCard	CREATE					
View Contacts	SAVE					
Import Contacts	OVERVIEW					-
Recently Viewed	First Name:	teste	Last Name:*	2		
test 🖌	Office Phone:		Mobile:			
test 🖌	Job Title:		Department:			
test2 🖍	Account Name:		Fax:			
	Email Address:	+ email@example.com	Primary	Opted Out	Invalid	
Activity Tracke	<u>r</u>				Ou	tright

## **13.** The newly created record is updated in activity holder.

ACTIVITY H	older							-
Name 🕀	Activity type 😂	Page Module 😂	Record ID $\Leftrightarrow$	Page visited time 🕀	Operating System $\Leftrightarrow$	IP Address ⇔	Country: 🕀	Device 🔶
Create								
test	Authenticate	Users		05/18/2021 09.14am	Windows NT 6.1; Win64; x64;	106.215.203.190	India	Desktop
test	index	Contacts		05/18/2021 09.15am	Windows NT 6.1; Win64; x64;	106.215.203.190	India	Desktop
test	DetailView	Contacts	72e931f4-9bc5- caf1-3b4f- 60a37e72d619	05/18/2021 09.16am	Windows NT 6.1; Win64; x64;	106.215.203.190	India	Desktop
test	Logout	Users		05/18/2021 09.13am	Windows NT 6.1; Win64; x64;	106.215.203.190	India	Desktop
test	sade	Contacts	72e931f4-9bc5- caf1-3b4f- 60a37e72d619	05/18/2021 09.16am	Windows NT 6.1; Win64; x64;	106.215.203.190	India	Desktop
test	Save	Contacts		05/18/2021 09.16am	Windows NT 6.1; Win64; x64;	106.215.203.190	India	Desktop
test	Create	Contacts		05/18/2021 09.16am	Windows NT 6.1; Win64; x64;	106.215.203.190	India	Desktop

**14.** Using the admin profile and go the account module.

ACTIVITY DAY SUMMARY	SALES	MARKETING	SUPPC	ORT ACTIVITIE	S COLLABO	RATION ALL		CREA	te 👻 Q	(A) (A)	dmin 🔫
See Day wise Report	< Home										
See All activities	Alcour									-	
See All activities	Conta	cts	tvne 🕀	Page Module 🕀	Record ID 🕀	Page visited time 🕀	Operating System 🕀		Country: 🕀	Device 🕀	Brow
Switch On/OFF extension	Oppor	tunities	() pe	T BBC Friedulte		Tuga Fisitad tinta	operating system		country :	Dia Tion	UI UI
	Leads						110-0-00-00-00-00-00-00-00-00-00-00-00-0				
Recently Viewed	Activit	y Day Summary	ate	Users		05/18/2021 09.14am	windows N1 6.1; Win64; x64;	106.215.203.190	India	Desktop	Mozilla
	100000000000000000000000000000000000000		1 ( ) ( ) ( ) ( ) ( ) ( ) ( ) ( ) ( ) (								

## **15.** The plugin has also recorded this user activity.

ACT	IVITY	HOLDER							
	Name 🕀	Activity type	Page Module	Record ID	Page visited time  🕀	Device 🕀	Browser 🔶	Operating System  🔶	Country
0-	BULK ACTIO	Ne 🝸 🔳							
1	admin	index دراس	Accounts		05/18/2021 09.20am	Desktop	Google Chrome	Windows NT 6.1; Win64; x64)	India
• /	test	DetailView	Contacts	72e931f4-9bc5- caf1-3b4f- 60a37e72d619	05/18/2021 09.16am	Desktop	Mozilla Firefox	Windows NT 6.1; Win64; x64;	India
- /	test	Save	Contacts	72e931f4-9bc5- caf1-3b4f- 60a37e72d619	05/18/2021 09.16am	Desktop	Mozilla Firefox	Windows NT 6.1; Win64; x64;	India
-/	test	Save	Contacts		05/18/2021 09.16am	Desktop	Mozilla Firefox	Windows NT 6.1; Win64; x64;	India
1	test	Create	Contacts		05/18/2021 09.16am	Desktop	Mozilla Firefox	Windows NT 6.1; Win64; x64;	India
1	test	index	Contacts		05/18/2021 09.15am	Desktop	Mozilla Firefox	Windows NT 6.1; Win64; x64;	India
1	test	Authenticate	Users		05/18/2021 09.14am	Desktop	Mozilla Firefox	Windows NT 6.1; Win64; x64;	India
-/	test	Logout	Users		05/18/2021 09.13am	Desktop	Mozilla Firefox	Windows NT 6.1; Win64; x64;	India

**16.** You can also filter the user activities based on keyword like delete, IP address, country, etc.

ACTIVITY HOLDER								€ ~ Q @@	admin 🔫
See Day wise Report	Q		FILTER			×			
See All activities		ACTIVIT	Quick Filter	Advanced Filter					
Switch On/OFF extensio	n	Name				• •		Operating System $~~\ominus~$	Country
Recently Viewed			Activity type	delete					
		🗙 🖌 test	Sign in time	E .		þ	Mozilla Firefox	Windows NT 6.1; Win64; x64;	India
Test	<i>_</i>	× / test	51			P	Mozilla Firefox	Windows NT 6.1; Win64; x64;	India
admin	2	🗙 🖌 test	Sign out time			2	Mozilla Firefox	Windows NT 6.1; Win64; x64;	India
admin	1	🗙 🖍 admin	Page Module Page Action			2	Google Chrome	Windows NT 6.1; Win64; x64)	India
testz		🗙 🖌 admin	Page visited time			2	Google Chrome	Windows NT 6.1; Win64; x64)	India
		🗙 🖌 admin	IP Address			Þ	Google Chrome	Windows NT 6.1; Win64; x64)	India
		🗙 🖍 admin		6	EARCH CLEAR		Google Chrome	Windows NT 6.1; Win64; x64)	India

**17.** Filtered records will instantly show up on the screen.

	Name \varTheta	Activity type  🕀	Page Module  🕀	Record ID	Page visited time  🕀	Device 🔶	Browser 😌	Operating System  🕀	Country
-	BULKACTIO								
/	test	Delete	Contacts	72e931f4-9bc5- caf1-3b4f- 60a37e72d619	05/18/2021 09.23am	Desktop	Mozilla Firefox	Windows NT 6.1; Win64; x64;	India
1	admin	Delete	Accounts	ec688bb3-b98d- 7bec-5852- 60a3792be34d	05/18/2021 09.21am	Desktop	Google Chrome	Windows NT 6.1; Win64; x64)	India

**18.** You can also export and share the entire activity of user.

	ACTIVITY HOLDER SALES MARKETING SUPPORT ACTIVITIES COLLABORATION ALL													
See Day wise Repo		4			Name 🔶	Activity type	Page Module	Record ID	Page visited time	Device 🔶	Browser 🔶	Operating System	Country	
See All activities			C.	, Se	elected:16	BULK ACTION								
+ Switch On/OFF ext			×	1	test	Mass Update	Users		05/18/202109.24am	Desktop	Mozilla Firefox	Windows NT 6.1; Win64; x64;	India	
			×	1	test	Export	Contacts		05/18/2021 09.23am	Desktop	Mozilla Firefox	Windows NT 6.1; Win64; x64;	India	
Recently Viewed	,		×	/	test	Delete	Contacts	72e931f4-9bc5- caf1-3b4f- 60a37e72d619	05/18/2021 09.23am	Desktop	Mozilla Firefox	Windows NT 6.1; Win64; x64;	India	
admin			×	1	admin	ListView	Accounts		05/18/2021 09.21am	Desktop	Google Chrome	Windows NT 6.1; Win64; x64)	India	
admin			×	1	admin	Delete	Accounts	ec688bb3-b98d- 7bec-5852- 60a3792be34d	05/18/2021 09.21am	Desktop	Google Chrome	Windows NT 6.1; Win64; x64)	India	
admin test2	,		×	,	admin	DetailView	Accounts	ec688bb3-b98d- 7bec-5852- 60a3792be34d	05/18/2021 09.21am	Desktop	Google Chrome	Windows NT 6.1; Win64; x64)	India	
								root i o i co i						