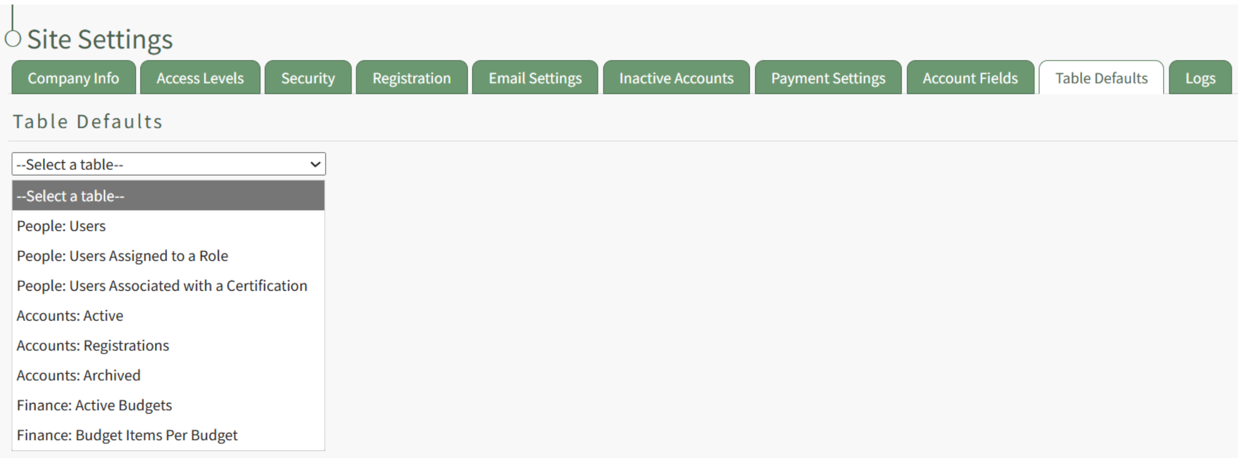
Customizable Tables in the Accounts Module

There are three tables in the Accounts Module than can be customized for your organization's specific needs.



The Active Accounts Table (on the Active Tab of the Accounts Module), the Archived Accounts Table (on the Archived Tab of the Accounts Module), and the Pending Account Registrations Table (on the Registrations Tab of the Accounts Module) are all customizable.

How To: Edit the Accounts Module Active Accounts Table

To edit the Active Accounts Table in the Accounts Module, go to the Table Defaults Tab in the Site Settings Module.

Select “Accounts: Active” from the dropdown menu.

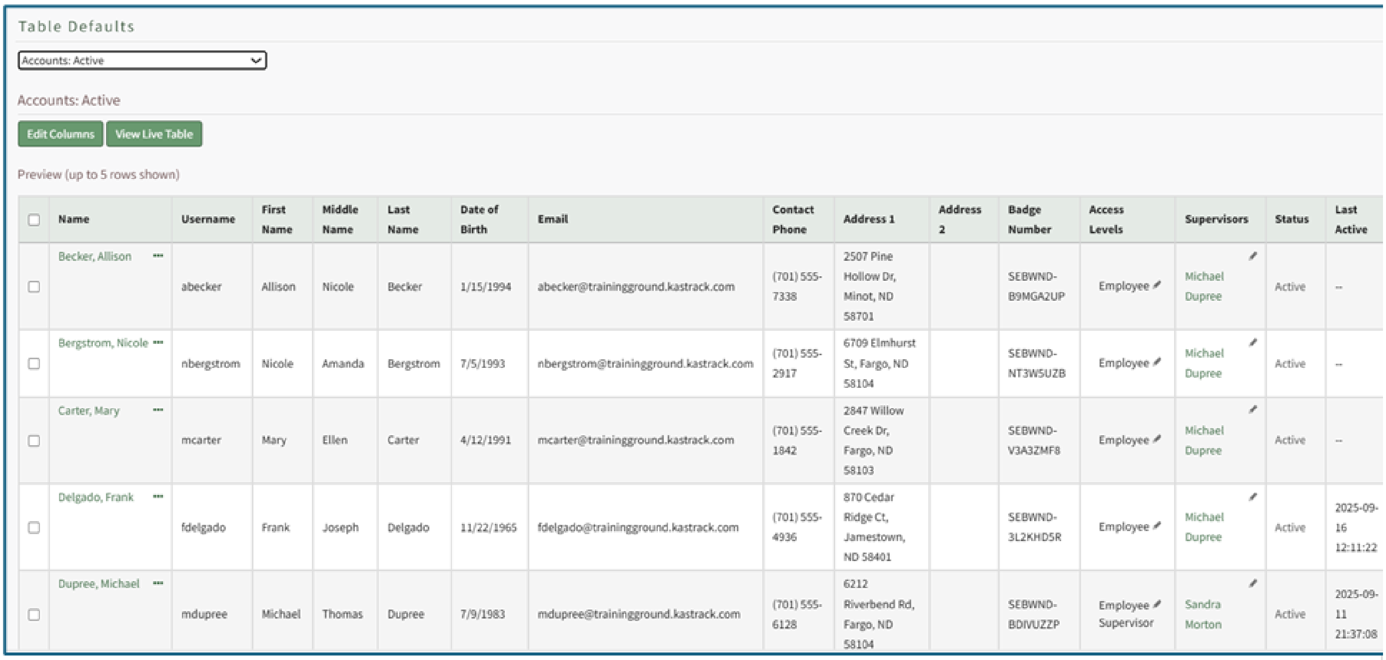


Table Defaults

Accounts: Active

Accounts: Active

Edit Columns | View Live Table

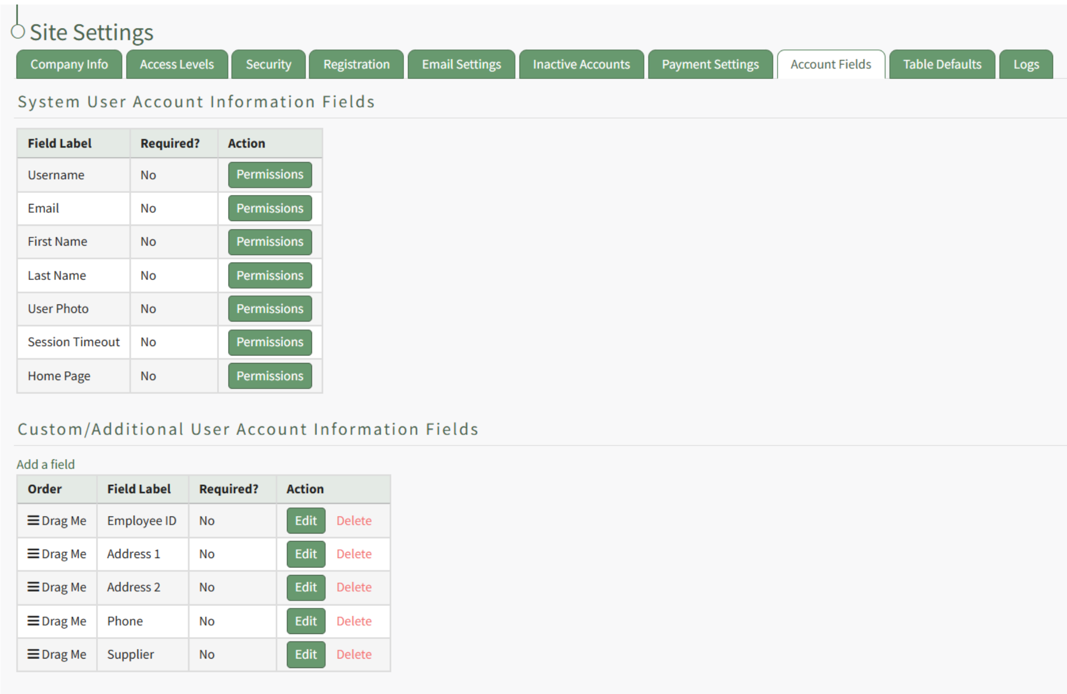
Preview (up to 5 rows shown)

Name	Username	First Name	Middle Name	Last Name	Date of Birth	Email	Contact Phone	Address 1	Address 2	Badge Number	Access Levels	Supervisors	Status	Last Active
Becker, Allison	abecker	Allison	Nicole	Becker	1/15/1994	abecker@trainingground.kastrack.com	(701) 555-7338	2507 Pine Hollow Dr, Minot, ND 58701		SEBWND-B9MGA2UP	Employee	Michael Dupree	Active	--
Bergstrom, Nicole	nbergstrom	Nicole	Amanda	Bergstrom	7/5/1993	nbergstrom@trainingground.kastrack.com	(701) 555-2917	6709 Elmhurst St, Fargo, ND 58104		SEBWND-NT3W5UZB	Employee	Michael Dupree	Active	--
Carter, Mary	mcarter	Mary	Ellen	Carter	4/12/1991	mcarter@trainingground.kastrack.com	(701) 555-1842	2847 Willow Creek Dr, Fargo, ND 58103		SEBWND-V3A3ZMF8	Employee	Michael Dupree	Active	--
Delgado, Frank	fdelgado	Frank	Joseph	Delgado	11/22/1965	fdelgado@trainingground.kastrack.com	(701) 555-4936	870 Cedar Ridge Ct, Jamestown, ND 58401		SEBWND-3L2KHD5R	Employee	Michael Dupree	Active	2025-09-16 12:11:22
Dupree, Michael	mdupree	Michael	Thomas	Dupree	7/9/1983	mdupree@trainingground.kastrack.com	(701) 555-6128	6212 Riverbend Rd, Fargo, ND 58104		SEBWND-BDIVUZZP	Employee Supervisor	Sandra Morton	Active	2025-09-11 21:37:08

Select the “Edit Columns” button, opening the Choose Columns Modal. The default column choices include: name, username, email, access levels, supervisors, become, status, last active, login, archive, first name, last night, employee ID, phone, Address 1 and Address 2 and any customized account fields.

How To: Add a Custom/Additional User Account Information Field

To add a user account information field, open the Account Fields Tab in the Site Settings Module from the Main Menu.



Site Settings

Company Info | Access Levels | Security | Registration | Email Settings | Inactive Accounts | Payment Settings | Account Fields | Table Defaults | Logs

System User Account Information Fields

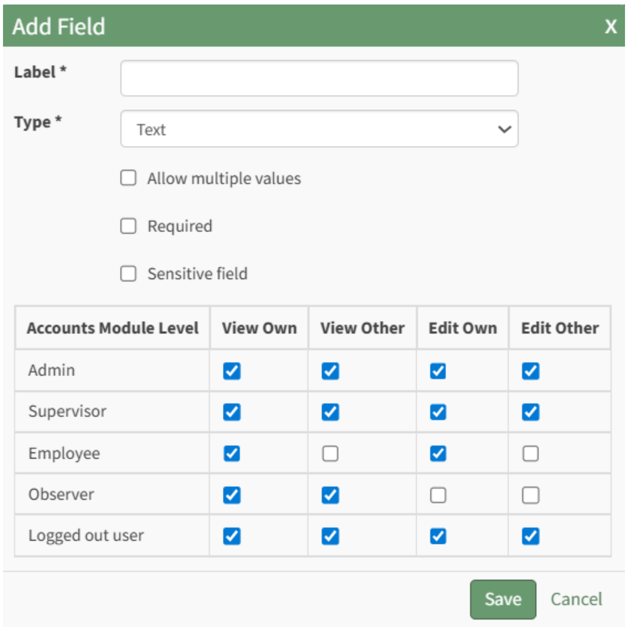
Field Label	Required?	Action
Username	No	Permissions
Email	No	Permissions
First Name	No	Permissions
Last Name	No	Permissions
User Photo	No	Permissions
Session Timeout	No	Permissions
Home Page	No	Permissions

Custom/Additional User Account Information Fields

Add a field

Order	Field Label	Required?	Action
☰Drag Me	Employee ID	No	Edit Delete
☰Drag Me	Address 1	No	Edit Delete
☰Drag Me	Address 2	No	Edit Delete
☰Drag Me	Phone	No	Edit Delete
☰Drag Me	Supplier	No	Edit Delete

Click the "Add a Field" clickable link above the Custom / Additional User Account Information Fields opening the Add Field Modal.



Input the label for the field.

Select the field type (text or email) from the dropdown menu.

Selecting the checkbox enables customization to "Allow multiple values," make the field "Required," or make it a "Sensitive Field."

> Designating the field as a "Sensitive Field" allows an extra step in form security when integrating these fields within the Form module. The Form Designer must explicitly choose when they wish to use a sensitive field.

The Permissions Table determines who can view / edit their own and other user's fields. Selecting the checkbox gives the individual the specified permission. Deselecting the checkbox removed the permission.

Select the "Save" button and the custom field now shows in the table.

Use the Drag Me icon to drag and drop the field into your desired position of choice.

The bars icon allows the columns to be positioned in the order of your choosing.

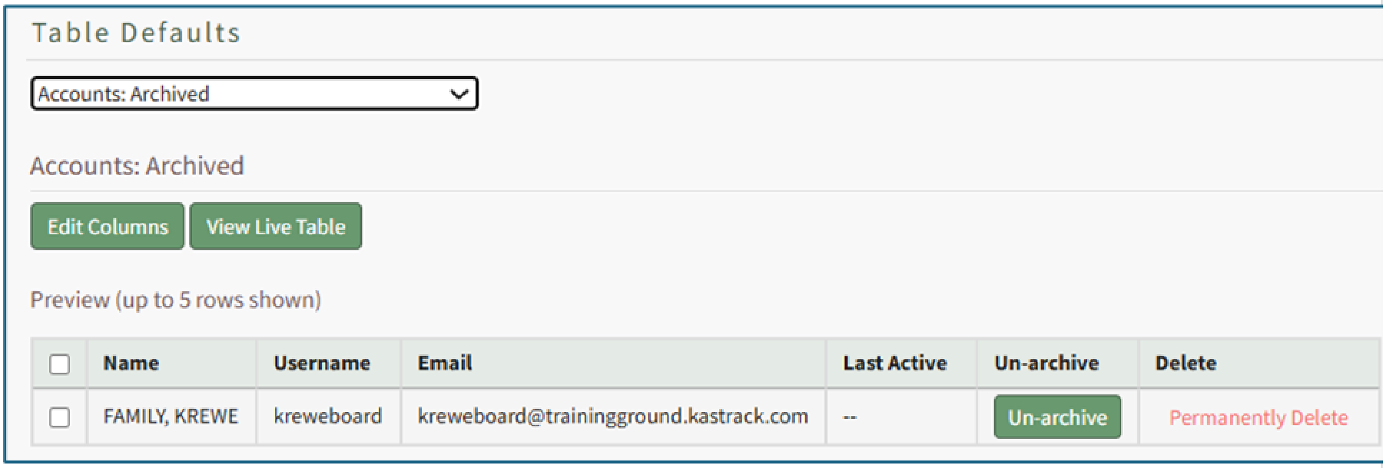
Click “Cancel” to return to the Table Defaults Tab without making any changes.

Select the “Save” button to make the desired changes and return to the Table Defaults Tab. A preview of the first five rows of the table is shown. Select the “View Live Table” button to be directed to the live table in the Accounts Module.

How To: Edit the Accounts Module Archived Accounts Table

To edit the Archived Accounts Table in the Accounts Module, go to the Table Defaults Tab in the Site Settings Module.

Select “Accounts: Archived” from the dropdown menu.



Select the “Edit Columns” button, opening the Choose Columns Modal. The default column choices include: name, username, email, last active, un-archive, delete, first name, last name, employee ID, phone, Address 1 and Address 2 and any customized account fields.

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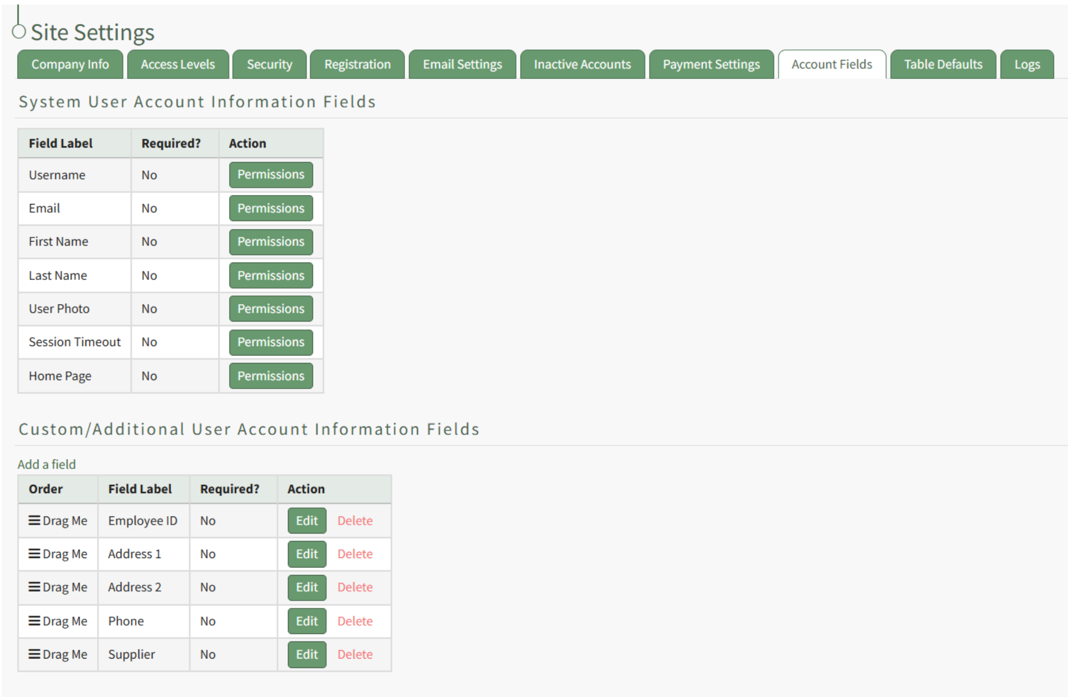
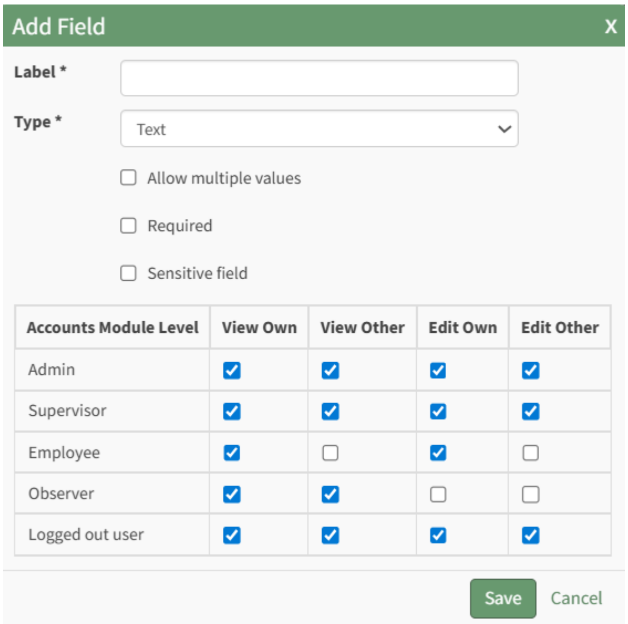


Click the "Add a Field" clickable link above the Custom / Additional User Account Information Fields opening the Add Field Modal.



Input the label for the field.

Select the field type (text or email) from the dropdown menu.

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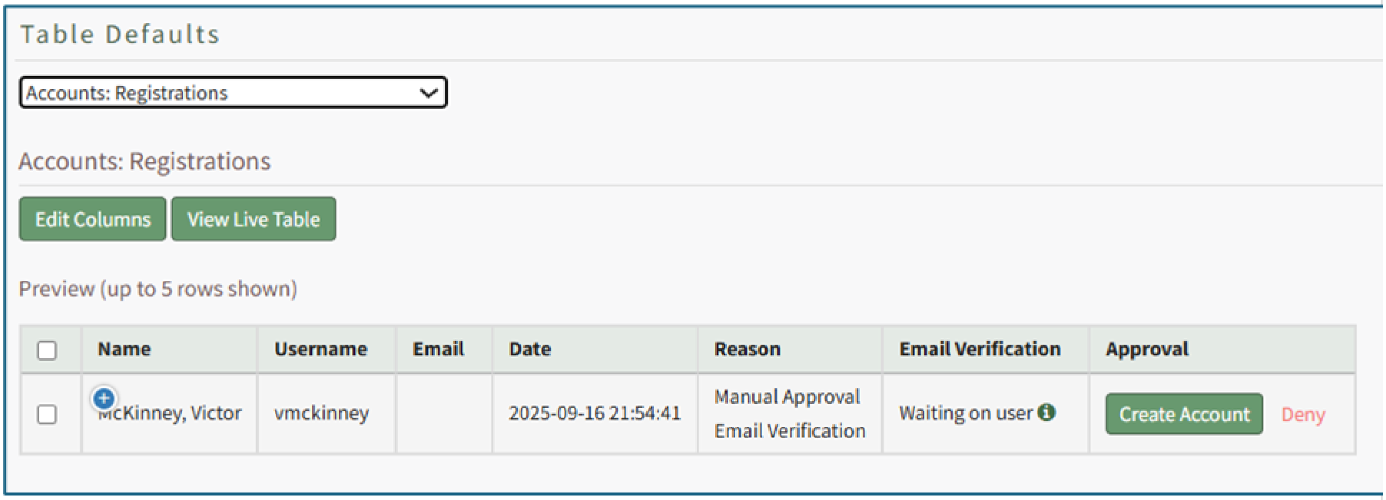
How To: Edit the Accounts Module Pending Registrations Table

To edit the Pending Registrations Table in the Accounts Module, go to the Table Defaults Tab in the Site Settings Module.

Select “Accounts: Registration” from the dropdown menu.



Select the “Edit Columns” button, opening the Choose Columns Modal. The default column choices include: name, username, email, date, reason, email verification, approval, first name, last name, employee ID, phone, Address 1 and Address 2 and any customized account fields.

How To: Add a Custom/Additional User Account Information Field

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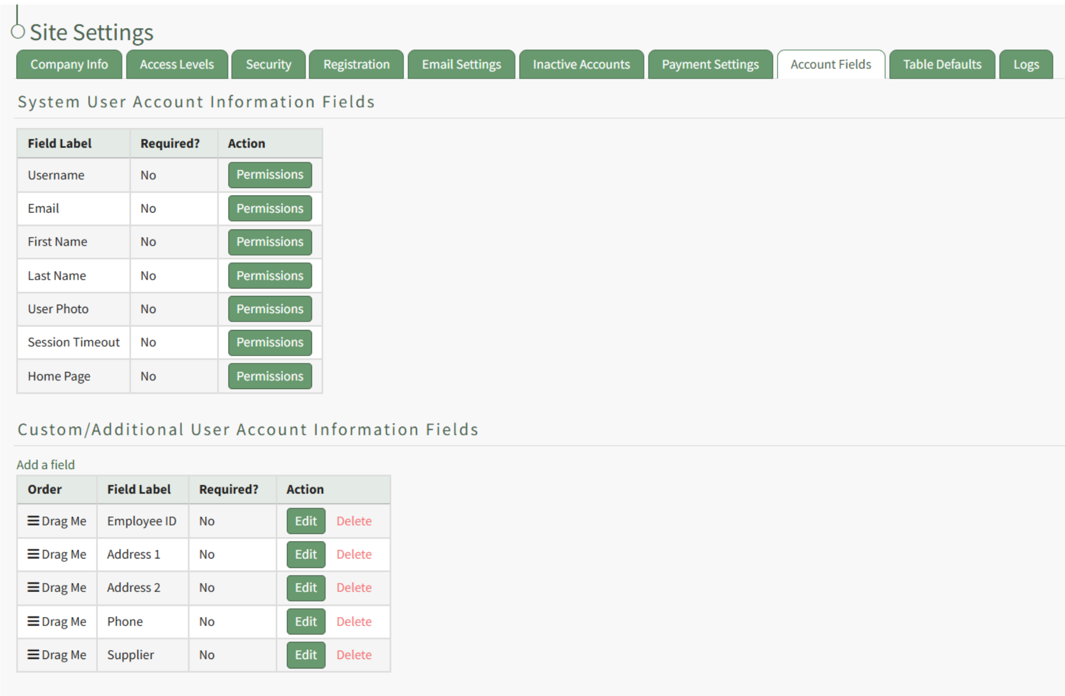
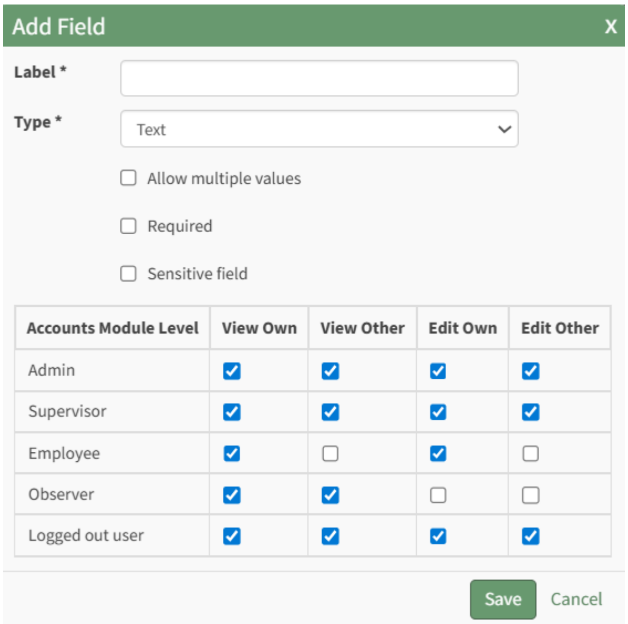


Click the "Add a Field" clickable link above the Custom / Additional User Account Information Fields opening the Add Field Modal.



Input the label for the field.

Select the field type (text or email) from the dropdown menu.

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Customizable user account information fields can be created and utilized in the tables as needed.

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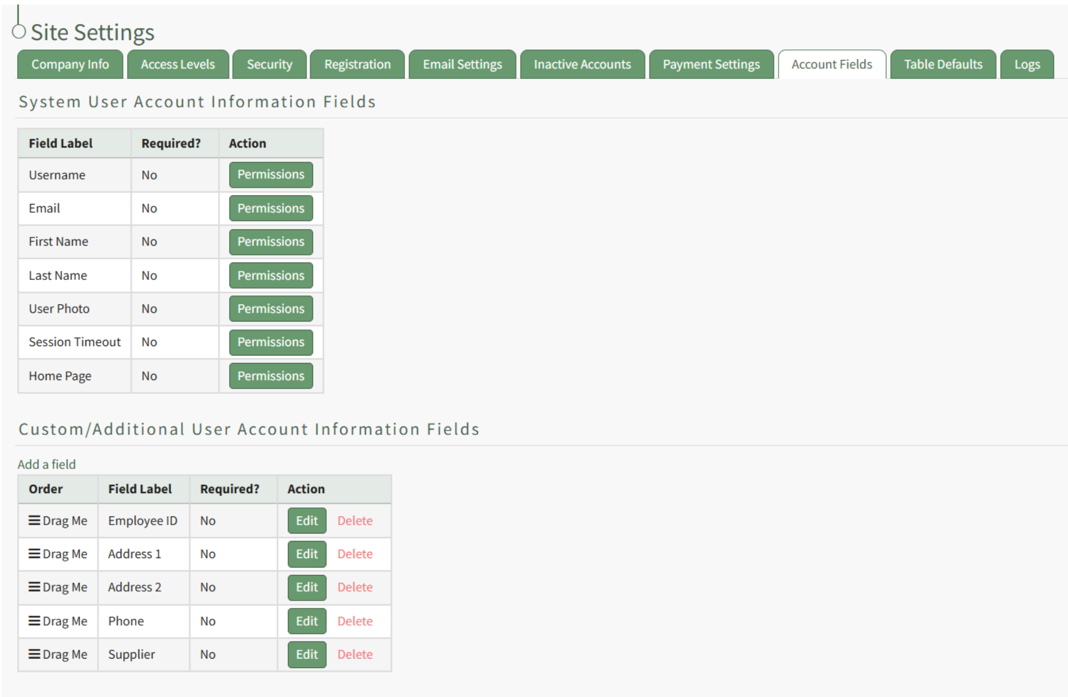

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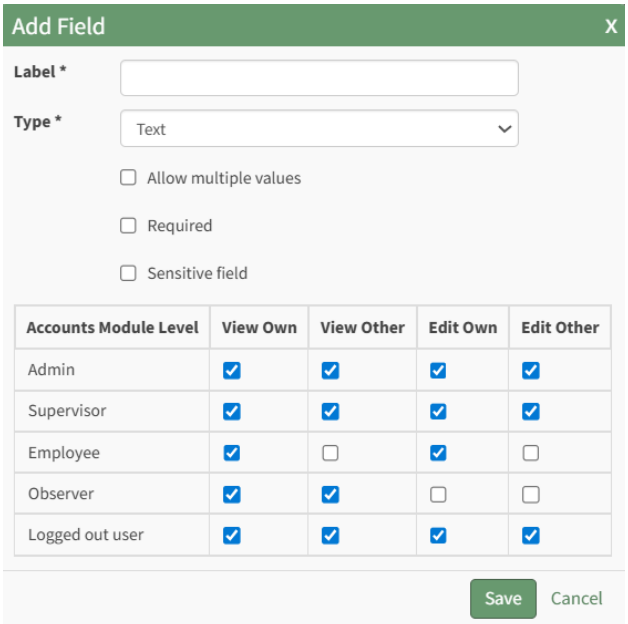

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Revision #3
Created 2026-01-28 21:30:35 UTC by Mitzi Orkus
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