User Management

Customer Relationship and Profile Management

Overview

User Management provides comprehensive customer relationship management (CRM) capabilities. This section allows you to view, search, and manage all customer profiles, track their order history, and maintain accurate contact information.

Access: Click "Users" in the left sidebar to access the user management page.

Users Table Overview

The users table displays all registered customers with their profile information:

Column	Description	Example Values
Avatar	Customer profile picture or initials	Profile image or "JS" for John Smith
Name	Customer's full name	John Smith, Sarah Johnson
Email	Primary email address	john.smith@email.com
Phone	Contact phone number	+91 9876543210
Join Date	Account registration date	15 May 2025
Status	Account status (Active/Inactive)	Active, Inactive
Actions	View and edit options	View Profile, Edit, Block/ Unblock

Search Functionality

Search Capabilities

The user search function allows you to find customers quickly using:

- **Full Name:** Search by complete or partial name
- **Email Address:** Find users by their email
- **Phone Number:** Search using contact numbers

How to Search for Users:

1. Locate the search bar at the top of the user management page
2. Type any part of the customer's name, email, or phone number
3. Search is case-insensitive and works with partial matches
4. Results filter automatically as you type
5. Clear the search field to show all users

Search Examples:

- Type "john" to find all users with "John" in their name
- Type "@gmail" to find all Gmail users
- Type "987" to find users with phone numbers containing "987"

User Profile Details

Viewing User Profiles

1. Click "View Profile" button next to any user
2. User detail modal opens with comprehensive information
3. Review all profile data and order history
4. Use this information for customer service inquiries

Profile Information Includes:

Section	Information	Usage
Basic Info	Name, email, phone, registration date	Customer identification and contact
Account Status	Active/inactive status	Account management and access control
Profile Picture	Customer uploaded avatar	Visual identification
Order History	List of all orders placed by customer	Service history and customer behavior analysis
Activity Timeline	Recent account activities	Customer engagement tracking

User Account Management

Editing User Profiles

How to Edit User Information:

1. Click "Edit" button next to any user
2. Edit user modal opens with editable fields
3. Modify necessary information (name, email, phone)
4. Click "Save Changes" to update the profile
5. Changes are immediately reflected in the system

Editable Fields:

- Full Name (first name and last name)
- Email Address (ensure valid format)
- Phone Number (include country code)
- Account Status (Active/Inactive)

Account Status Management

Status	Description	Impact	When to Use
Active	Normal functioning account	User can place orders and use all features	Default status for all users
Inactive	Temporarily disabled account	User cannot place new orders	Temporary suspension or account issues
Blocked	Permanently restricted account	Complete access restriction	Policy violations or fraudulent activity

How to Block/Unblock Users:

1. Click the action menu next to a user
2. Select "Block User" or "Unblock User"
3. Confirm the action in the popup dialog
4. User status updates immediately
5. Blocked users receive notification via mobile app

Customer Service Use Cases

Common Customer Inquiries

Scenario 1: Customer Can't Remember Order Details

1. Search for customer using name, email, or phone
2. Open their profile to view order history
3. Identify the relevant order from the list
4. Provide order status and details to customer
5. Navigate to Orders page for detailed order management if needed

Scenario 2: Customer Contact Information Update

1. Find customer profile using existing information
2. Click "Edit" to open the edit modal
3. Update phone number or email address
4. Save changes to ensure future communications reach customer
5. Inform customer that updates are complete

Scenario 3: Account Issues or Complaints

1. Locate customer profile quickly using search
2. Review their complete order history for context
3. Check for any pattern of issues or complaints
4. Take appropriate action (edit profile, contact customer, escalate)
5. Document resolution in customer notes if available

Scenario 4: Suspicious Activity or Policy Violations

1. Review customer's complete profile and order history
2. Analyze patterns of behavior or order anomalies
3. If necessary, change account status to "Inactive" temporarily
4. For serious violations, block the user account
5. Document the reasons for action taken

Customer Analytics and Insights

User Behavior Analysis

Use the user management section to gather insights about your customer base:

Key Metrics to Track:

- **Registration Trends:** Monitor new user sign-ups over time
- **Customer Retention:** Identify repeat customers from order history
- **Service Preferences:** Analyze most popular service types per customer
- **Geographic Distribution:** Review customer locations for service planning
- **Contact Preferences:** Ensure communication channels are up to date

Customer Segmentation

Customer Type	Characteristics	Management Strategy
New Customers	Recently registered, first-time users	Focus on onboarding and first order experience
Regular Customers	Multiple orders, consistent usage	Maintain service quality, offer loyalty benefits
Inactive Customers	Registered but no recent orders	Re-engagement campaigns, service improvements
High-Value Customers	Frequent large orders, high spending	Premium service, dedicated support

Data Privacy and Security

Important Privacy Guidelines:

- **Data Protection:** Customer information is confidential and should only be accessed for legitimate business purposes
- **Information Sharing:** Never share customer details with unauthorized parties
- **Access Control:** Only view customer data when necessary for customer service or business operations
- **Update Accuracy:** Ensure all profile updates are accurate and verified

Security Best Practices

- Always verify customer identity before discussing account details
- Use secure communication channels for sensitive information
- Log out of admin portal when not in use
- Report any suspicious account activity immediately
- Keep customer data confidential and secure

Integration with Order Management

User Management is closely integrated with Order Management for comprehensive customer service:

Cross-Reference Workflow:

1. **From Users to Orders:** Click on a customer to view their order history, then navigate to specific orders for detailed management
2. **From Orders to Users:** When viewing an order, click on customer information to access their complete profile
3. **Customer Service:** Use both sections together to provide comprehensive customer support
4. **Issue Resolution:** Track customer issues across both profile management and order history

Workflow Tip: Keep both Users and Orders tabs open in separate browser tabs for efficient customer service operations.

Troubleshooting User Management Issues

Issue: Cannot find a specific customer
Solutions:

- Try searching with partial information (first name only, partial email)
- Check for spelling variations or typos
- Verify the customer has actually registered in the system
- Clear search filters and browse the full user list

Issue: Customer information appears outdated
Solutions:

- Check if customer updated their profile recently via mobile app
- Refresh the page to load latest information
- Manually update information if verified with customer

Issue: Cannot edit user profile
Solutions:

- Ensure you have appropriate admin permissions
- Check that all required fields are properly filled
- Verify email format is valid
- Try refreshing the page and attempting edit again

Best Practices for User Management

Daily Operations

- **Regular Reviews:** Periodically review new user registrations
- **Data Quality:** Ensure customer contact information is accurate and up-to-date
- **Customer Service:** Use profile information to provide personalized service
- **Issue Tracking:** Monitor customer complaints and resolution patterns

Long-term Strategy

- **Customer Retention:** Identify and engage inactive customers
- **Service Improvement:** Use customer feedback to enhance service quality
- **Growth Planning:** Analyze customer demographics for business expansion
- **Quality Assurance:** Regular audit of customer data accuracy

Weekly User Management Checklist:

- Review new customer registrations
- Update any customer information requests
- Check for inactive accounts that need attention
- Verify contact information accuracy
- Monitor customer service resolution rates