



Web Company
Admin Guide

ACT
AS
ONE



v. 2.4.12



1. Guests

A guest is a contact that has been provisioned in a TOTR organization by a TOTR user from the organization, and not by you, or by a Department Admin. You may authorize users to invite guests from Settings > Company Settings > Users Authorization > Authorize users to invite guests.

The guest is automatically provisioned in a special department within the organization. They cannot be added to groups or moved to different departments. The guest is not visible to other guests.

On the Mobile and WebChat applications, though they are linked to a department, guests are not displayed in that department details. They do not have access to other departmental communication or to the channel associated with the department in the **Channels** tab.

When you incorporate the guest to the organization, they will have the same status as the users. Before the integration, they have access solely to the features you have defined in the Guest Profile. To configure a guest profile, go to Settings > Company Settings > Users Authorization > Guest Profile options. No communication is possible between a user and a guest when the user tries to use a feature that you configured as inactive for the guest.

Note: If you have the **Display the group All** option enabled and click on the **All** group in the **Groups and Departments** tab, you will only see the number of users in your company, not the number of guests. Also, at the bottom of the page, in the Users' list, you will only see the names of the users, not the names of the guests. This prevents guests from seeing the **All** group in their **Contacts** list, as well as the users who are members of the group.

1.1. Guests List

1.1.1. Guests Counter

As the Company Admin, you see the number of external contacts that have been added to the organization by the authorized users on the counter in the upper right corner. As a Department Admin, the counter shows you the number of external contacts added by the authorized users to the departments and sub-departments you manage.

	First Name	Last Name	User ID	Invited By	Invitation Date	Group / Department
<input type="checkbox"/>	Guest	1	4588	User 1	11/03/2022	TOTR Services

My Company > Guests > Guests List > Guests counter

1.1.1.2. Guests Details

You will see the following details for each guest added by the authorized users:

- First Name
- Last Name
- Mobile Number/User ID
- Authorized user's name
- Invitation Date
- The Group or the Department to which the guest will be assigned

	First Name	Last Name	User ID	Invited By	Invitation Date	Group / Department
<input type="checkbox"/>	Guest	1	4588	User 1	11/03/2022	TOTR Services
<input type="checkbox"/>	Guest	2	8734	User 1	11/03/2022	TOTR Services

My Company > Guests > Guests List > Guests details

1.1.1.3. Incorporating One or More Guests in the Organization

If you decide to incorporate a guest into the organization, they become users and will have access, like other users of the organization, to all features and data. They will no longer be shown on the **Guests** list after incorporation, but on the **Users** list.

To incorporate one or more guests into the organization, select them by checking the box in front of their name, then click on the **Incorporate** button, in the upper right corner of the Guests List.

	First Name	Last Name	User ID	Invited By	Invitation Date	Group / Department
<input checked="" type="checkbox"/>	Guest	1	4588	User 1	11/03/2022	TOTR Services
<input type="checkbox"/>	Guest	2	8734	User 1	11/03/2022	TOTR Services

My Company > Guests > Guests List > Selecting and incorporating guests into the organization

A confirmation pop-up will appear. If you click **Yes**, the selected guests will become users. If you select **No**, the procedure will be cancelled.

CONFIRMATION REQUIRED ✕

You are about to incorporate the selected guests in your organization.
They will be listed in the Users list.
Are you sure?

NOYES

My Company > Guests > Guests List > Incorporating guests confirmation

1.1.1.4. Searching for Guests

Using the Search bar, you can look for specific guests.

Enter at least two characters, and then wait for the results to appear just below the Search bar. Then you can click the guest to see more information about it.

The screenshot shows the 'GUESTS LIST' interface. On the left is a navigation menu with options: DASHBOARD, USERS, GUESTS (highlighted), USER PROFILE, ORG. CHART, GROUPS AND DEP., LINK CHANNELS, and ADMIN. The main area has a 'GUESTS LIST' header and a search bar containing 'Guest 16'. Below the search bar is a table with 15 rows of guest data. The table columns are: First Name, Last Name, User ID, Invited By, Invitation Date, and Group / Department. The first 15 rows show 'Guest' as the first name and various User IDs (1-15) and invitation dates (11/03/2022). At the bottom of the table, there are navigation controls: '< 1 > 2' and a dropdown menu set to '1'.

	First Name	Last Name	User ID	Invited By	Invitation Date	Group / Department
<input type="checkbox"/>	Guest	1	4588		11/03/2022	
<input type="checkbox"/>	Guest	2	8734		11/03/2022	
<input type="checkbox"/>	Guest	3	9812		11/03/2022	
<input type="checkbox"/>	Guest	4	5654		11/03/2022	
<input type="checkbox"/>	Guest	5	6667		11/03/2022	
<input type="checkbox"/>	Guest	6	7664		11/03/2022	
<input type="checkbox"/>	Guest	7	3458		11/03/2022	
<input type="checkbox"/>	Guest	8	7654		11/03/2022	
<input type="checkbox"/>	Guest	9	3390		11/03/2022	
<input type="checkbox"/>	Guest	10	6433		11/03/2022	
<input type="checkbox"/>	Guest	11	7642		11/03/2022	
<input type="checkbox"/>	Guest	12	6542		11/03/2022	
<input type="checkbox"/>	Guest	13	7665		11/03/2022	
<input type="checkbox"/>	Guest	14	8654		11/03/2022	
<input type="checkbox"/>	Guest	15	7643		11/03/2022	

My Company > Guests > Guests List > Search for guest

1.1.1.5. Deleting One or More Guests from the Organization

If you decide to delete a guest from the organization, they will no longer be able to use TOTR to interact with the users.

To delete one or more guests from the organization, select them by checking the box in front of their name, then click on the **Delete** button, in the upper right corner of the Guests List.

	First Name	Last Name	User ID	Invited By	Invitation Date	Group / Department
<input checked="" type="checkbox"/>	Guest	1	4588	User 1	11/03/2022	TOTR Services
<input type="checkbox"/>	Guest	2	8734	User 1	11/03/2022	TOTR Services

My Company > Guests > Guests List > Selecting and deleting guests from the organization

A confirmation pop-up will appear. If you click **Yes**, the selected guests will be deleted. If you select **No**, the procedure will be cancelled.

CONFIRMATION REQUIRED

You are about to delete the selected guest(s).
Are you sure?

NO **YES**

My Company > Guests > Guests List > Deleting guests confirmation

1.2. Guests in the Activity Report

As the Company Admin of an organization with the option **Receive Activity Report** enabled and the feature **Invitation of External Users** activated, your monthly Activity Report will include the following columns:

- **Date:** Displays the year, month, day, hour and second when a guest is invited by an authorized user or when an admin incorporates or deletes a guest.
- **Administrator/Authorized Users:** Displays the name (or the phone number) of administrators and authorized users who have the right to invite external guests and have performed a relevant action during the month.
- **Actions:** Displays the action performed by an administrator or an authorized user about a guest (invitation, incorporation, or deletion).

If the feature **Invitation of External Users** is deactivated, your monthly Activity Report will not contain the above columns.

