

# CSR

Staff users are assigned to customers and jobs as customer service representatives (CSRs). In the software, the CSR is considered to be the key communicator with the customer when a job is created. The CSR receives e-mail notifications about the customer's actions.

## Customer CSRs

Customer CSRs are staff users who are assigned to particular customer accounts. The system automatically sends an e-mail notification to the customer's CSR when an action is performed on the customer's account-for example, files are uploaded.

You can prevent a Customer CSR from receiving e-mail notifications about a particular job by assigning another staff user as the *Job CSR* for this job.

Staff users can add or remove Customer CSRs in the customer account. Customer users cannot view or change Customer CSR information.

## Job CSRs

Job CSRs are staff users who are assigned to particular jobs. The system automatically sends an e-mail notification to these CSRs when an action is performed on the job-for example, files are uploaded.

Staff users can add or remove Job CSRs in the job properties. Customer users cannot view or change Job CSR information.

For more information, click **Jobs** on the home page, and then click **Help** on the toolbar.