

Managing User Accounts

The purpose of this document is to provide System Administrators with the information needed to create and manage SmartBuild user accounts. System Administrators can access SmartBuild's user-management interface by clicking the *Settings* menu and selecting the *Users* option from the drop-down list, as pictured in Figure 1 at right.

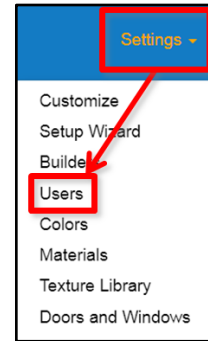


Figure 1: Opening the *Users* admin page.

Parts of the Users Page

When you click on *Users* from the *Settings* menu, a SmartBuild *Users* administration page will open, similar to the one pictured below in Figure 2. As you can see, user information is presented in table format. Below is a list of a list of the columns available on the *Users* page, along with a brief description of the function of each:

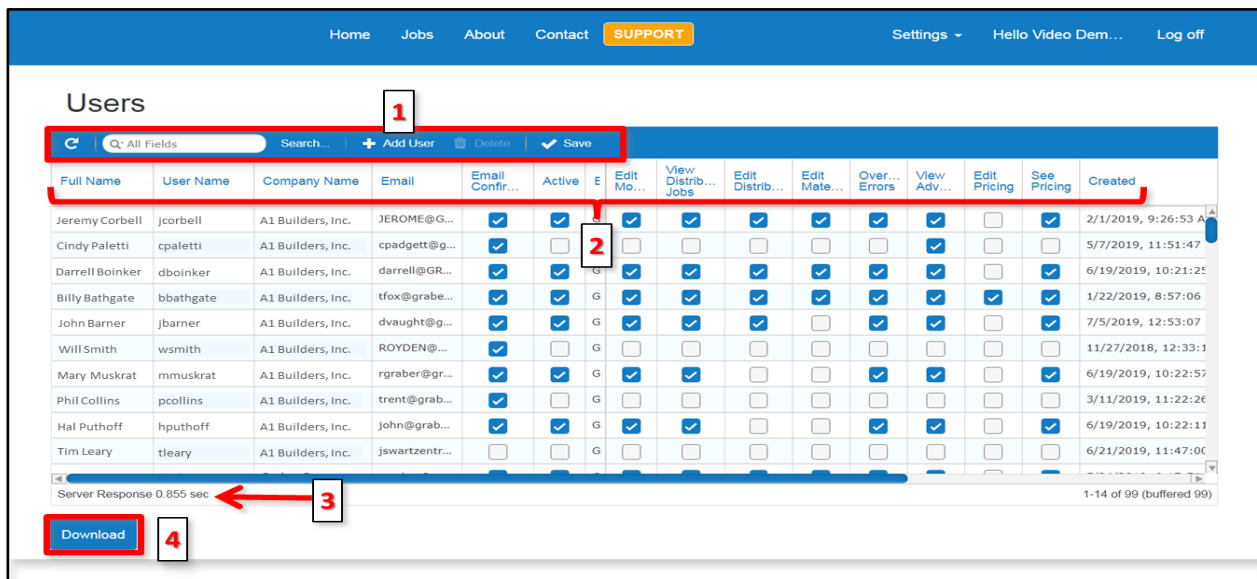


Figure 2: The System Administrator's interface for managing user accounts.

1. The *Users* page **Command Toolbar** provides quick access to the most commonly used functions for managing user accounts:
 - **Refresh** – Clicking on the *Refresh* button updates the list of accounts displayed on the *Users* page, to reflect any changes made since the last refresh operation.
 - **Search** – Use the *Search* field and button to locate user accounts based upon any word, or partial word, contained within the text fields in the *Users Table*.

- **Add User** – Clicking on the *Add User* button will open the *Register Link* message box pictured in *Figure 3*, at right. You will copy the link displayed in this message box and email it to your prospective new user in order to invite them to register with SmartBuild.



Figure 3: The *Register Link* message box.

- **Delete** – Clicking on the *Delete* button will erase the selected user account from SmartBuild. **NOTE** – If you attempt to delete a user account that currently has jobs assigned to it, you will receive the error message shown in *Figure 4*. All jobs assigned to the user must be reassigned before the account can be deleted.

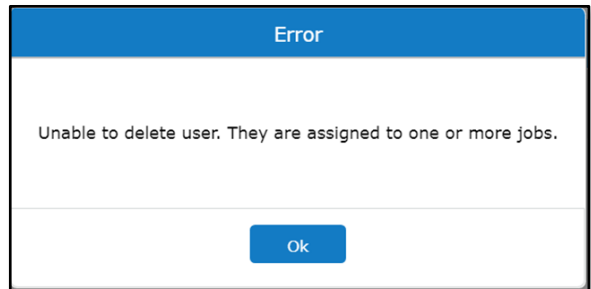


Figure 4: Error message when attempting to delete a user account with assigned job(s).

- **Save** – Clicking on the *Save* button keeps all changes made on the *Users* page since the last *Save* operation.

2. Columns in the **Users Table** parse all *User Account* information into its various components. (The information contained in each of these columns is explained in the section of this document immediately following.)
3. The **Server Response Time Indicator** displays the speed with which the SmartBuild server is currently processing your commands within the interface.
4. The **Download** button is used to create a CSV file of all accounts in the *Users Table*.

Columns in the Users Table

Following is a complete list of all the columns found in the SmartBuild *Users Table*, along with an explanation of their functions:

Full Name – This field is used to record the user’s first and last name. The data entered should be unique within the *Users Table*.

User Name – This is the name that the user will enter during the SmartBuild login process. **NOTE** – as an alternative, the user’s email address can be used to log in.

Company Name – This is the name of the company to be associated with the new user account.

Email – This is the email address to be associated with the user’s SmartBuild account. All SmartBuild accounts are required to have a single, verified user account.

Email Confirmed – When new users register with SmartBuild, they receive a follow-up email message asking them to confirm their email address. (Figure 5 at right.) Once this confirmation process has been completed, SmartBuild will automatically place a checkmark in the `Email Confirmed` checkbox

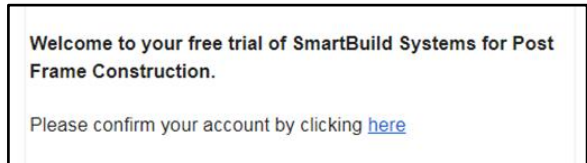


Figure 5; Part of the email confirmation message automatically sent to newly registered users.

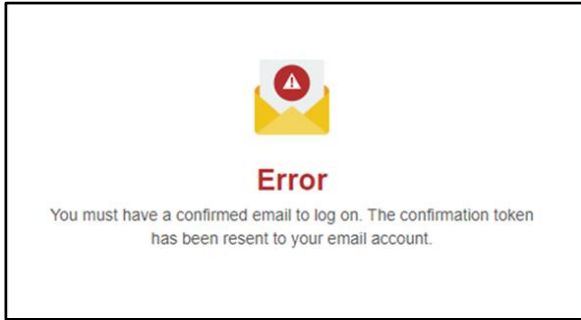


Figure 6: The error message received by users who attempt to log in with an unconfirmed email account.

Active – The `Active` checkbox is used to indicate whether or not a user account is currently operational. If there is no checkmark in this checkbox then, when the user attempts to log in, he or she will receive the error message shown in Figure 7 at right.

Builder – This field is used to indicate the name of the Builder (or Supplier) account with which the given user is associated.

Edit Models – When a checkmark is placed in the `Edit Models` checkbox, the user is granted access to modify the models displayed on his or her `Jobs` page. In addition, the following items will be visible on the user's `Home` page: his/her 10 most recent jobs, the “start from scratch” link, and the starting models.

View Distributor Jobs – If the `View Distributor Jobs` checkbox is activated (checked), then the user will be able to view, edit, delete (etc.) all jobs created by other users within his/her company, as well as any jobs associated with child organizations for that company. If this checkbox is unchecked, the user will only be able to see those jobs that he/she has created, along with any jobs created by others that have been assigned to him/her.

Edit Distributor – When a checkmark is placed in the `Edit Distributor` checkbox, the user will be granted access to view the `Settings` menu with the functions pictured in Figure 8 at right. When this checkbox is unchecked, then the `Settings` menu and the associated options listed in Figure 8 will be hidden from the user.

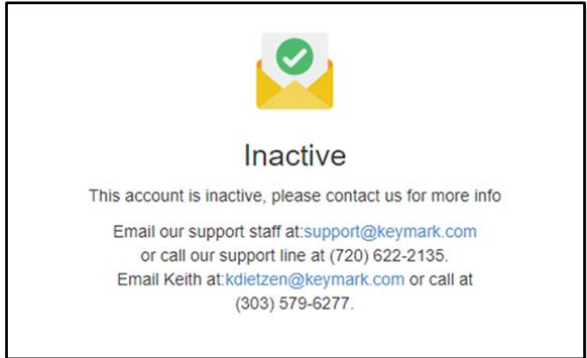


Figure 7: The error message a user receives when attempting to log in with an inactive user account.

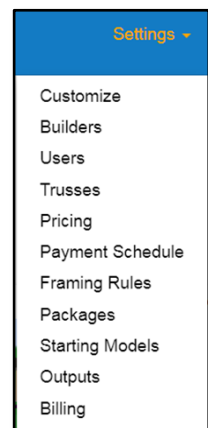


Figure 8: Settings menu when `Edit Distributor` is checked.

Edit Material – If a checkmark is placed in the `Edit Material` checkbox then, in addition to the menu items listed in Figure 8 (above) the following functions will be added to the user's `Settings` menu: `Setup Wizard`, `Colors`, `Materials`, `Doors and Windows`, and `Span Tables`. Otherwise, these functions will remain hidden from the user's `Settings` menu. **NOTE** – If the `Edit Distributor` checkbox is unchecked, the `Settings` menu and all of its contents will remain hidden from the user - *even if the `Edit Material` checkbox is activated!*

Override Errors – If a checkmark is placed in the `Override Errors` checkbox, then the user will be granted permission to change a job's status to `Quoted` even if there are errors associated with that job. If this checkbox is unchecked then, when the user attempts to change the status of a job with errors to `Quoted`, the user will receive the error message shown in Figure 9 at right.

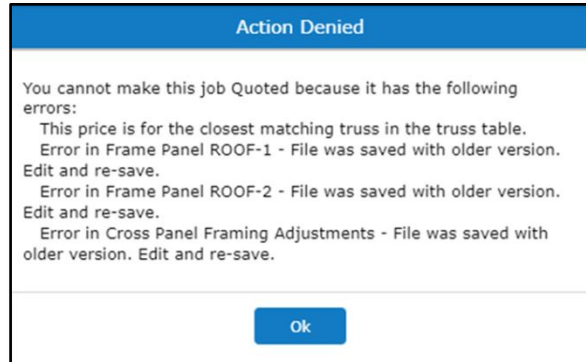


Figure 9: Error message displayed when the `Override Errors` checkbox is unchecked.

View Advanced – When a checkmark is placed in the `View Advanced` checkbox, the user will be able to see ALL fields on the `Job` and `Door and Window` tabs in the `Properties Pane`, including those fields that have been defined as `Hidden` in the `Framing Rules`.

Edit Pricing – When this checkbox is activated (checked), the user will be granted permission to edit pricing information using the `Settings` menu `Pricing` function. **NOTE** – The user must also be granted the `Edit Distributor` permission, or the `Settings` menu will not be visible to him/her. If the user has been granted `Edit Distributor` rights, but the `Edit Pricing` checkbox is unchecked, then that user will be able to view pricing information but he/she will be unable to make any changes to that information.

See Pricing – When a checkmark is placed in the `See Pricing` checkbox, then the user will be able to see the pricing information displayed as the `Configured Price` on page headers, as well as the pricing information listed on the `Summary` tab in `Job Review Mode`. Left unchecked, this information will be hidden from the user.

Phone Number – This is the telephone number entered by the user, or the `Systems Administrator`, at the time the user's account is created.

NOTE – Checkbox permissions are the only fields that can be edited directly from the `Users` administration page. All text-based fields must be edited using the fields under `Change Your Account Settings` on the `Manage` page. In addition, other than the `Email Confirmed` checkbox, all permissions checkboxes on the user's page are inactive (unchecked) by default. When checkbox permissions are changed and saved by the `System Administrator`, the affected user must log out and then log back in before the new permissions will become effective.

Creating a New Builder Account

There are two different methods for creating a new user account. If you don't have many users to manage, you can send out an email with a registration link to allow users to register themselves. This method has the advantage of minimizing the amount of upfront work required by the Systems Administrator. The disadvantage is that users will be permitted to enter registration information using any naming conventions and formats they choose. This can make it inefficient to view and sort the information contained in the *Users Table*.

If you have many user accounts to manage, the best method adding a new user to SmartBuild is to register the new user yourself, and then email them their login information. This method has the advantage of allowing you, as the Systems Administrator, to implement naming and formatting conventions for user data that will make account management much easier in the long term.

INVITING USERS TO REGISTER THEMSELVES

To allow a new user to self-register, perform the following actions:

1. Click on the *Settings* menu and select *Users*.
2. On the *Users* page, click on the *Add User* button. A *Register User* message box like the one pictured in Figure 10 will open.
3. In the *Register Link* message box, select and copy the entire hyperlink that is displayed.
4. Open your email application and send a message to your new user that contains the copied registration link, along with any additional information or instructions you wish to include.
5. When the user opens his or her email and clicks on the registration link, it will open the SmartBuild web registration page shown below in Figure 11 below.

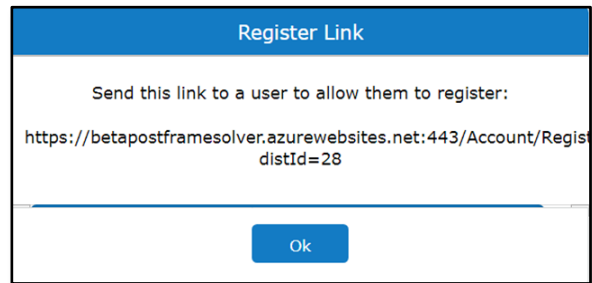


Figure 10: Copy the hyperlink in the *Register Link* message box.

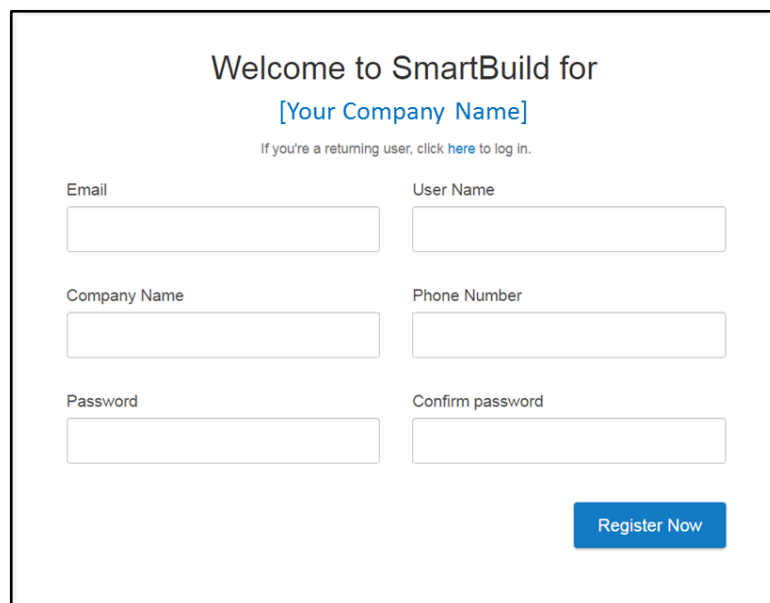
A screenshot of the SmartBuild user registration web page. The page has a white background with a blue header. The header text reads "Welcome to SmartBuild for [Your Company Name]". Below the header, there is a link: "If you're a returning user, click here to log in." The main content area contains six input fields arranged in two columns. The left column has fields for "Email", "Company Name", and "Password". The right column has fields for "User Name", "Phone Number", and "Confirm password". At the bottom right of the form is a blue button labeled "Register Now".

Figure 11: The SmartBuild user registration web page.

6. Once the new user completes the registration form and clicks on the `Register Now` button, the message shown in Figure 12 (right) will pop up on his/her screen.

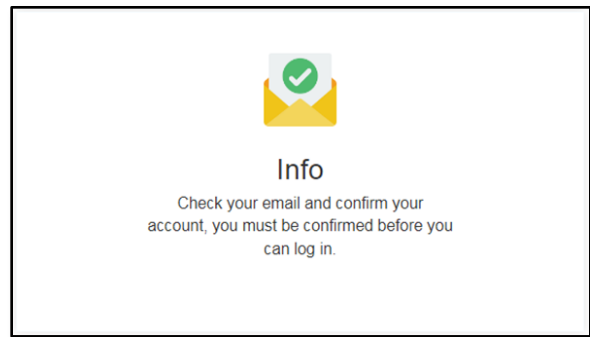


Figure 12: Message to new user announcing confirmation email.

7. The user will receive a an email with the subject line "*Confirm your account.*" When the user clicks on the hyperlink provided in this email, the confirmation process is complete and the message box pictured in Figure 13 will be displayed. As noted on page 3 of this document, SmartBuild will then automatically activate (check) the `Email Confirmed` checkbox for this new account on the `Users` page.

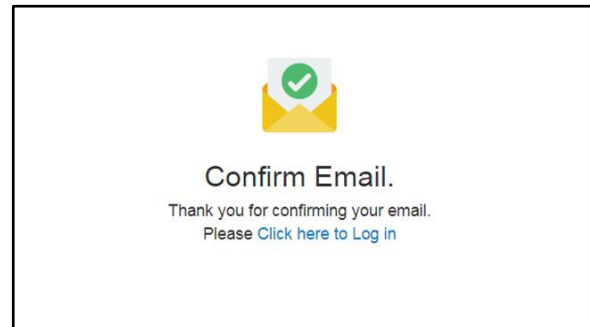


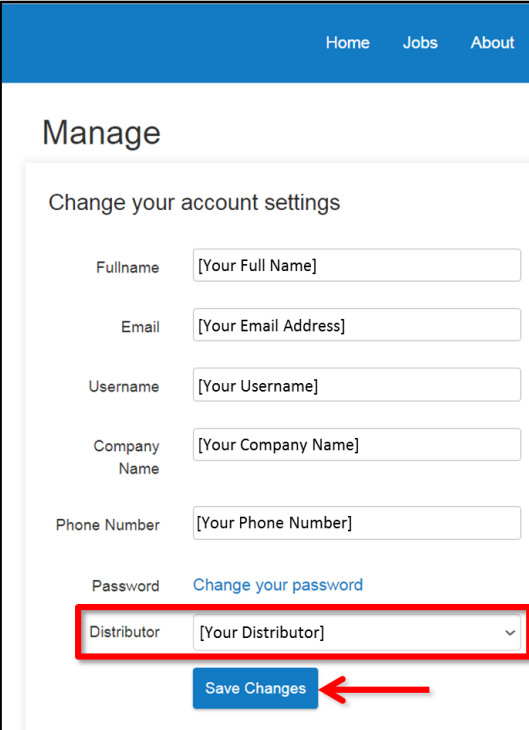
Figure 5: Message received by new user once email confirmation process completed.

8. Once the user has completed the registration process and confirmed his/her email account, return to the `Users` administration via the `Settings` menu.
9. On the `Users` page, locate the newly registered user and activate (check) or deactivate (uncheck) each of the permission checkboxes as desired, to establish the correct permissions for this new user.
10. To complete the process, click on the `Save` button to keep your changes and exit the `Users` page.

SYSTEM ADMINISTRATOR ACCOUNT CREATION

To create a new user account yourself (and control data naming and formatting conventions), perform the following actions:

1. On the SmartBuild page header, click on Hello [Your User Name] to open the *Manage* page.
2. At the bottom of the *Manage* page, click on the drop-down list next to the *Distributor* field and select the name of the company to which the new user account is to be added. (See Figure 14 at right)
3. Click on the *Save* button to save your change.
4. Go to the *Settings* menu and click on the *Customize* option to open your SmartBuild *Customize* page.
5. On the *Customize* page, copy the hyperlink displayed, as shown in Figure 15 below:



The screenshot shows the 'Manage' page with a blue header containing 'Home', 'Jobs', and 'About'. The main content area is titled 'Manage' and 'Change your account settings'. It contains several input fields: 'Fullname' (with placeholder '[Your Full Name]'), 'Email' (with placeholder '[Your Email Address]'), 'Username' (with placeholder '[Your Username]'), 'Company Name' (with placeholder '[Your Company Name]'), and 'Phone Number' (with placeholder '[Your Phone Number]'). Below these is a 'Password' field with a link 'Change your password'. The 'Distributor' field is a dropdown menu with a placeholder '[Your Distributor]' and a downward arrow, highlighted with a red box. At the bottom is a blue 'Save Changes' button with a red arrow pointing to it.

Figure 6: Select the *Distributor* for the new user account.



The screenshot shows the 'Customize' page with a blue header containing 'BETA', a logo, 'Home', 'Jobs', 'About', 'Contact', 'SUPPORT', 'Settings', 'Hello Video Dem...', and 'Log off'. The main content area is titled 'Customize' and shows a dropdown menu for 'Graber Post Buildings'. Below this are two links: 'Give your users the following link to login:' with a URL 'https://betapostframesolver.azurewebsites.net:443/Account/Login?distId=28' and 'Give them the following link to register:' with a URL 'https://betapostframesolver.azurewebsites.net:443/Account/Register?distId=28'. The registration link is highlighted with a red box, and a red arrow points to it.

Figure 7: Copy this link to register an account on behalf of a new user.

6. Open your web browser and paste the link you just copied into your browser's navigation bar. The new user registration page will open, as pictured in Figure 11 on page 5.
7. Fill out the new user registration form using the naming and formatting conventions established for your company, and then click on the *Register Now* button. Use a generic password on the registration page.
8. SmartBuild will automatically send the user an email with the subject line "*Confirm your account.*" Once the user clicks on the hyperlink provided in this email, he/she will receive the confirmation message shown in Figure 13 on the previous page.

9. Once the user has confirmed his/her email account, go to the `Settings` menu and select `Users`.
10. On the `Users` page, locate the newly registered user account and activate (check) or deactivate (uncheck) each of the permission checkboxes as desired, to establish the correct permissions for this new user.
11. Send the user an email, instructing them to change their password on their `Manage` page. Users should also be instructed NOT to change any of the other user information shown on the `Manage` page, so as not to undermine the naming and formatting conventions you have established for your user data.