Chainformation Admin User Guide

(Units)

Last Updated: March 22, 2023

Welcome to the **Chainformation** user guide. In this manual, we will learn how to manage the **Units** section on the **Our organisation** page.

A **Unit** on a **Chainformation** platform is the same thing as the local work site, restaurant, shop, office, etc. of a brand/company.

*NOTE to SUPER ADMIN: You must first make the proper settings for **Local, Central** and **Global** levels of the **Our organisation** function in your **system setup** to control which **Roles** in your organisation are allowed to add new units and manage existing unit accounts. <u>See the User Guide</u> for **Roles Administration***

Here is a list of all the features of the **Units** module that we will discuss in this manual.
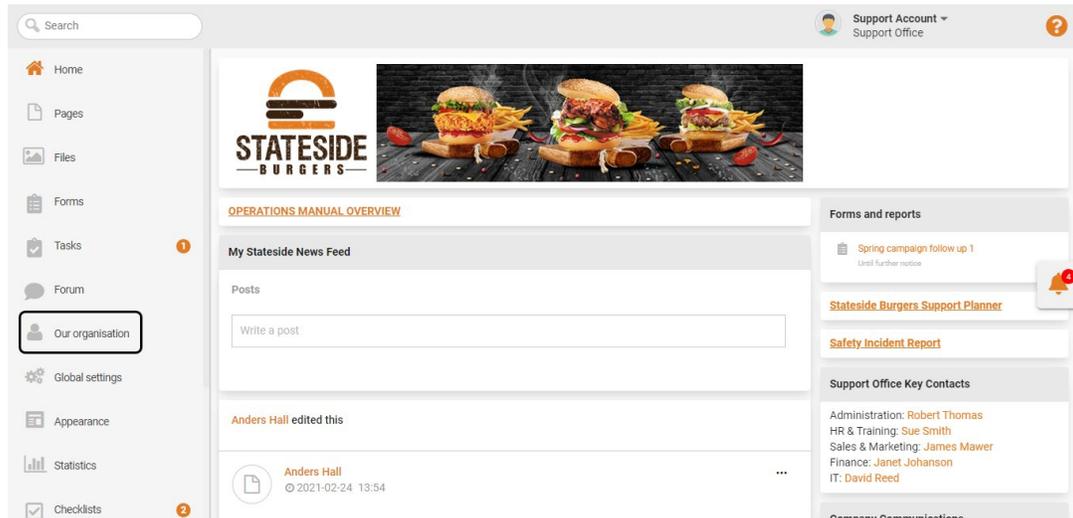
> ➤ Delete a Unit Account

Add a New Unit

Once you have logged in to the **Chainformation** platform, then follow these navigation steps to **add** a **new unit** to your **organisation.**

1. Click the **Our organisation** button in the left-side menu to open the **Our organisation** page.


If you are accessing the platform from the **Chainformation** mobile app, you can open your profile menu by clicking the **hamburger** icon in the top-left corner of your mobile screen.
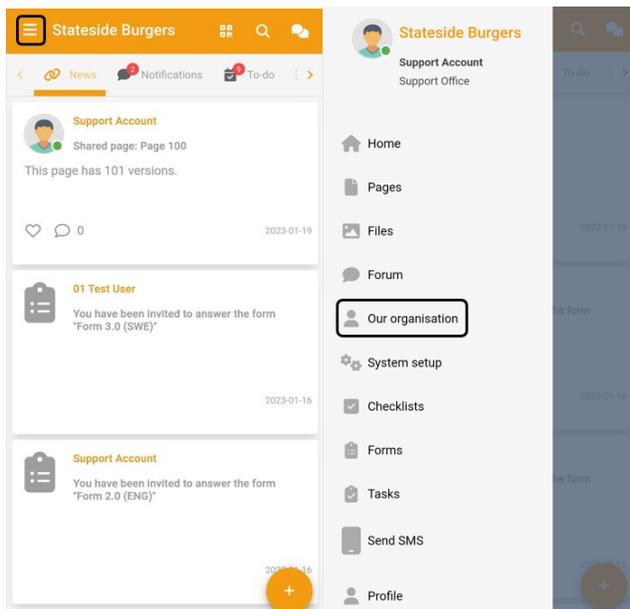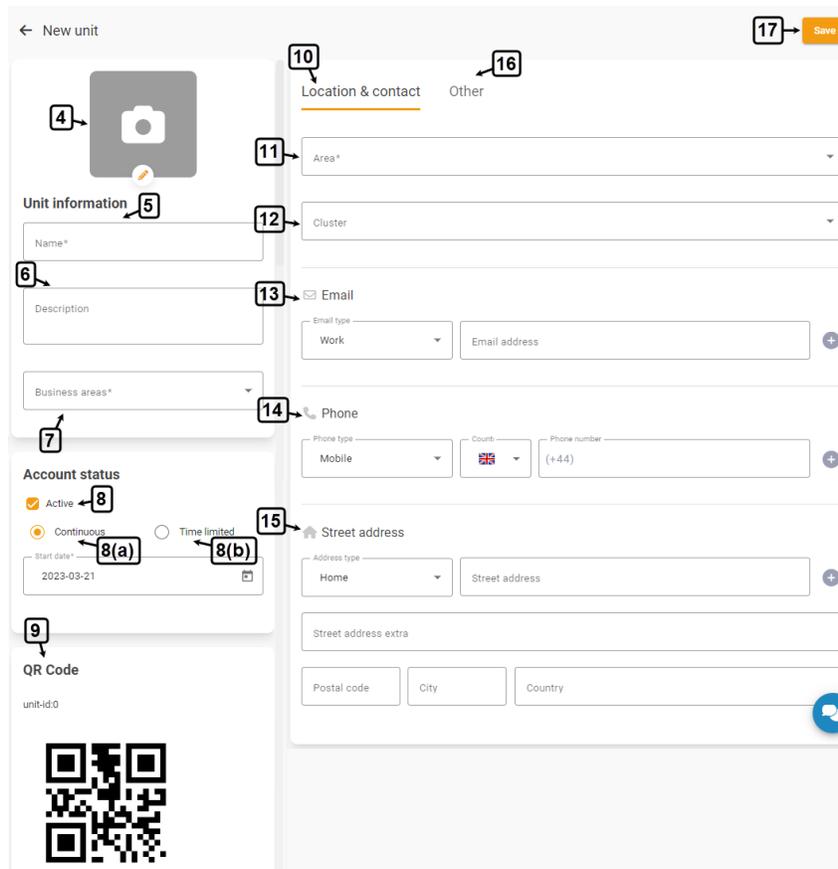

By default, you will be redirected to the **Colleagues** tab.

2. Click the **Units** button in the header menu to open the **Units** tab.

3. Click the (+) icon in the top-right corner of the **Units** page to add a new unit.
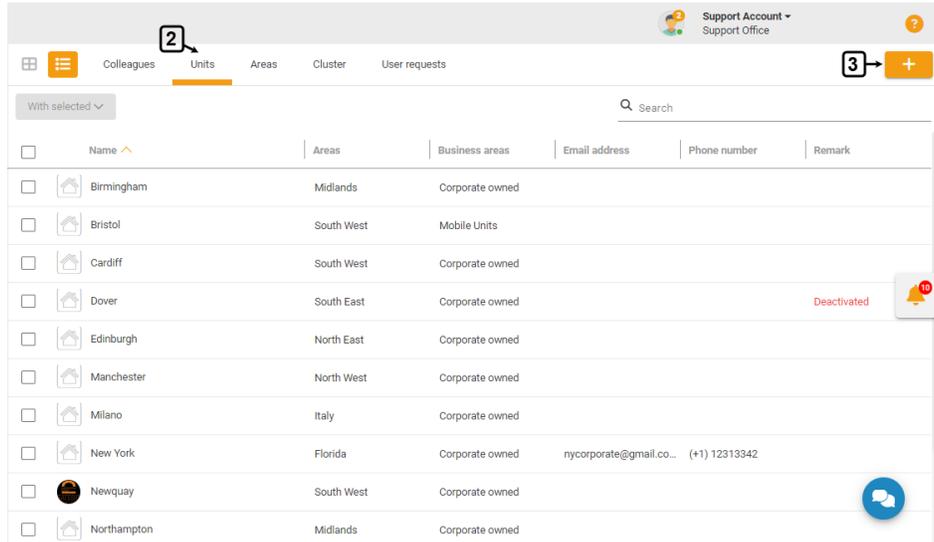
This will open the **New unit** page.

4. On the **New unit** page, upload a display image of the new unit from your device or **Chainformation File Manager**. See the User Guide for **Files**

5. Under the **Unit information** heading, enter the new unit name in the **Name** field.

6. Enter a **Description** of the new unit (if applicable).

7. Select one or more **Business areas** of the new unit. See the User Guide for **Business Areas**

8. Under the **Account status** heading, choose what will be the current account status of the new unit.

Make sure you keep the **Active** checkbox enabled, otherwise, the unit will be deactivated.

8(a). Select the **Continuous** option and set a **Start date** if you want to keep the new unit account active for an indefinite period.

8(b). Select the **Time limited** option and set a valid **Start/End date** if you want to activate the new unit account for a definite period.

Note: The unit will be deactivated if you set the **End date** in the past.

9. You can see/save the **QR Code** generated for the new unit under the respective heading (if applicable). See User Guide for **QR Codes**

10. Now, go to the **Location and contact** tab to add location and contact information of the new unit.

11. Select the geographical **Area** in which the new unit is being established. See the User Guide for **Geographical Areas**

12. Select the **Cluster** to which the new unit belongs (if applicable). See the User Guide for **Clusters**

13. Enter the **email address** associated with the new unit (if applicable).

14. Enter the **phone number** associated with the new unit (if applicable).

15. Enter the **Street address** of the new unit (if applicable).

Note: You can add more than one email address, phone number, and/or street address by pressing the **Add** (**+**) icon next to the respective fields.

16. Now, go to the **Other** tab and enter the required data for the unit custom fields (if applicable).

Note: The **Other** tab will be hidden if you have added no unit custom fields in your system settings. See the User Guide for **Custom Fields (Other settings)**

Once you have entered all the unit details, carefully review all the information you've entered under different headers on the **New unit** page.
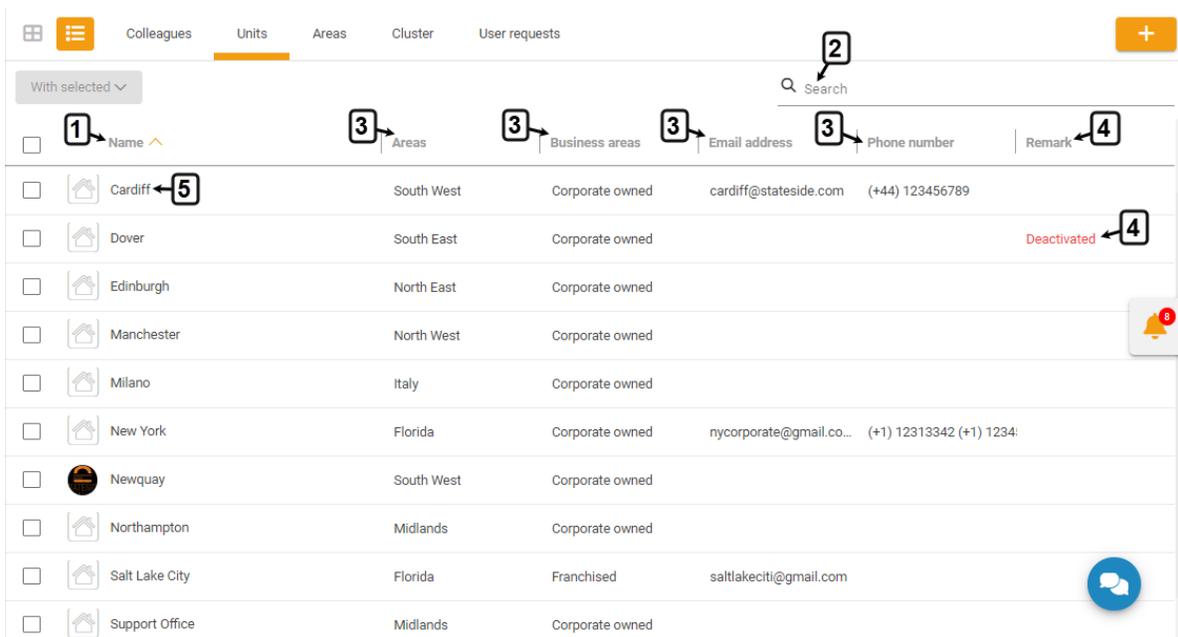
Note: All fields with the **Asterisk** (*****) sign are mandatory and you cannot save a unit profile if you have left any one of the mandatory fields empty.

17. Click the **Save** button in the top-right corner of the page to activate the new unit account.

Now, you and your selected colleagues can associate this unit to different users and share different content items with this unit. See the User Guide for **Colleagues** and **Sharing Selection**

View Existing Units in Your Organisation

Once you have opened the **Units** tab on the **Our organisation** page as demonstrated in the previous section, you can view the names of different units in your organisation and their corresponding details on this page.

1. Under the **Names** heading, you can see the names and display images (if any) of all the units listed on the page.

2. You can also use the **Search** field to find a unit based on any of the available data/information. See the User Guide for **Search**

3. You can see the area, business area(s), primary email address, and phone number of each unit next to their name in the list.

https://chainformation.com/userguides

4. Under the **Remarks** heading, you can see the **Deactivated** label for the unit whose account is currently deactivated.

5. You can review the general, contact details and colleagues associated with a unit by clicking its name on the **Units** page.

This will open the Unit profile dialogue where you can review its profile details as follows.

Review a Unit Profile
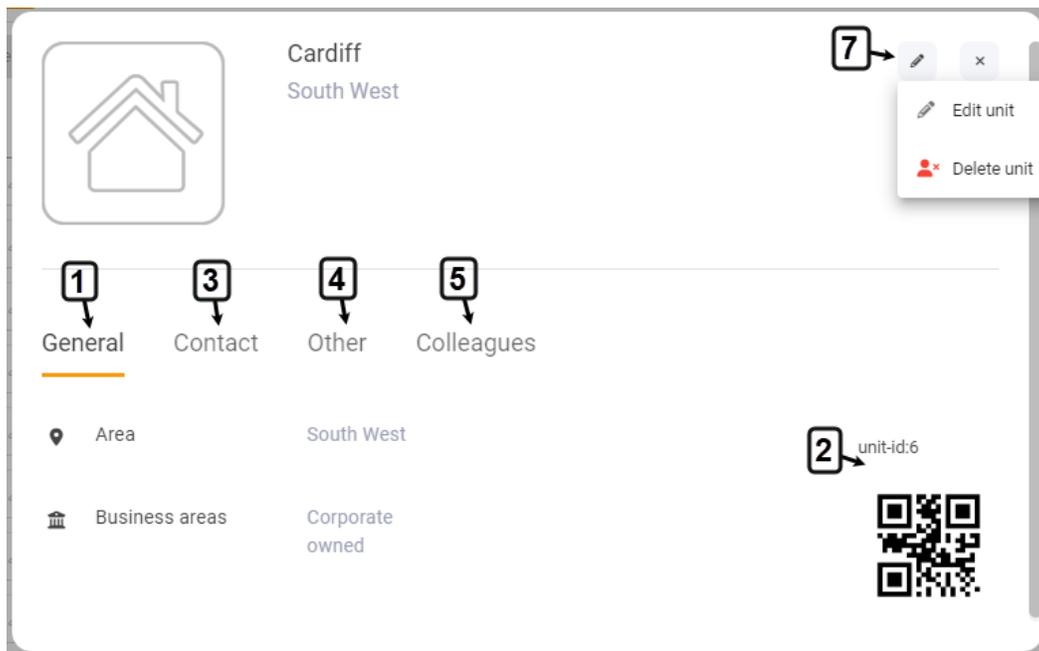
1. Under the **General** header, you can review the area, and business area(s) of the selected unit.

2. You can also review/scan the selected **unit ID** and **QR Code** on the **General** tab.

3. Under the **Contact** header, you can review the email address(es), phone number(s) and street address of the selected unit (if available).

4. Under the **Other** header, you can review the selected user data for the colleague custom fields (if available). Under the User Guide for **Custom Fields (Other Settings)**

Note: You can't see the **Other** tab and information related to custom data fields for a unit if you don't have the editing rights for this particular unit. See the User Guide for **Our Organisation Rights (Roles Administration)**

5. Under the **Colleagues** header, you can view the selected users who belong to the selected unit.

6. You can see the last sign in of the listed colleagues to their Chainformation account under the **Latest activity** heading on the **Colleagues** tab of the selected unit.

7. You can edit or delete a unit by clicking the **Edit** (✏) icon in the top-right corner of the unit profile dialogue and then, selecting the required option from the dropdown.

Clicking on the **Edit unit** option will open the **Edit unit** page where you can change the account status, and other profile details of the selected unit.

Edit a Unit Profile

1. On the **Edit unit** page, you can update the selected unit information on different tabs as demonstrated in the previous section. See the User Guide for **Add a New User**

Remember, certain changes in a unit profile e.g. changing/removing a business area, geographical area, and/or cluster might affect sharing selection of different content items shared with this unit.

Some users associated with this unit might lose access to these content items after you save this change. See the User Guide for **Sharing Selection**

Deactivate/Activate a Unit Account

2. **Disable** the **Active** checkbox under the **Account status** header to deactivate the selected unit account.

Note: When you deactivate a unit, all users who belong to only this unit will also be deactivated.

Similarly, all such user accounts will be reactivated automatically after you reactivate the unit by **enabling** the **Active** checkbox under the **Account status** header on the **Edit unit** page. See the User Guide for **Deactivated Users (Colleagues)**


Delete a Unit Account

Remember, there is no **Trash** folder for the **Units** module on the **Chainformation** platform from which you can restore a deleted unit. Therefore, when you delete a unit, the system will remove it from the database permanently.

Nonetheless, follow the navigation steps demonstrated below to delete a user if you still want to do this.
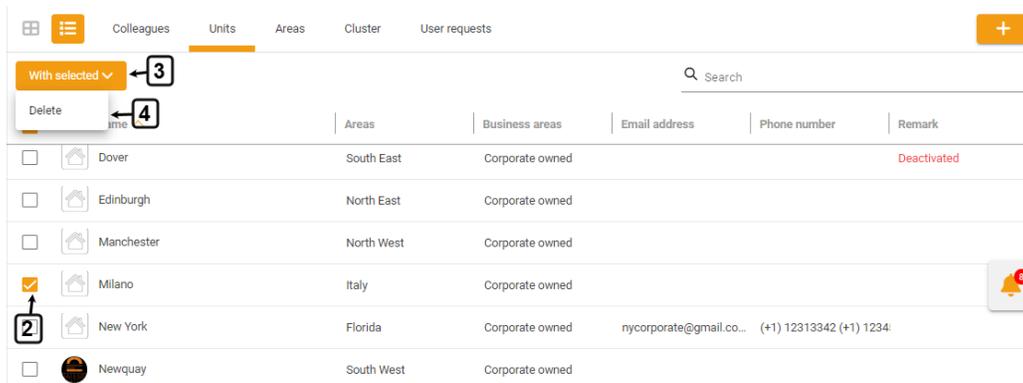
1. Access the **Units** tab on the **Our organisation** page by following the navigation steps as demonstrated in the previous section.

2. On the **Units** page, navigate to the unit(s) you want to delete and **check** the **checkbox** next to its name.

3. Click the **With selected** button above the listed units.

4. Click the **Delete** option from the **With selected** dropdown to delete the selected units.

5. You can also delete a unit by selecting the **Delete unit** option from the **Edit** menu on the unit profile dialogue. See the User Guide for **Review a Unit Profile**

6. Click the **DELETE** button on the warning dialogue to delete the selected unit account(s).
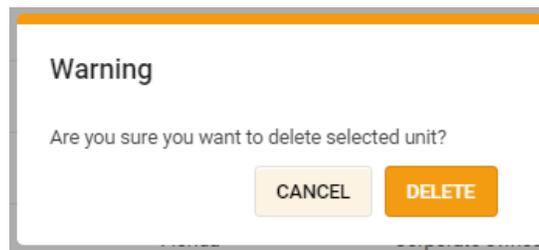
Note: You cannot delete a Unit until you have deleted *all* the users who only belong to this unit or assigned them to another unit. The system will show an error when you will try to delete a unit that has users who are only attached to this unit.

https://chainformation.com/userguides