Chainformation Admin User Guide

(Other System Settings)

Last Updated: March 03, 2025

Welcome to the **Chainformation** user guide. In this manual, we will learn how to manage **Other settings** of your **System setup**.

On the **Other settings** tab of the **System setup** page of your **Chainformation** platform, you can manage standard and custom fields of unit and user profiles in your organization on the **Unit custom fields** and **Colleague custom fields** pages respectively. As the field settings for both the unit and user profiles are identical, therefore, we have discussed them together in one section of this manual instead of creating separate sections for each of them.

On the **Other settings** page, you can also manage the roles which should be available to the new users when they are requesting access to your organization. Furthermore, you can set up your support contact that will be shown under "**Help**" on the login page of your organization's intranet. You can set up your company's own email address that will be used to send system emails such as summary emails, login help, support messages, etc. **by adding your own (SMTP)** server and email address

Now, we will discuss **Other system settings** of a **Chainformation** platform one by one as follows:

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Manage Unit/Colleague Custom Fields

Custom Fields is a feature allowing you to create custom data fields to collect and save information and structured data related to Users and/or Units.

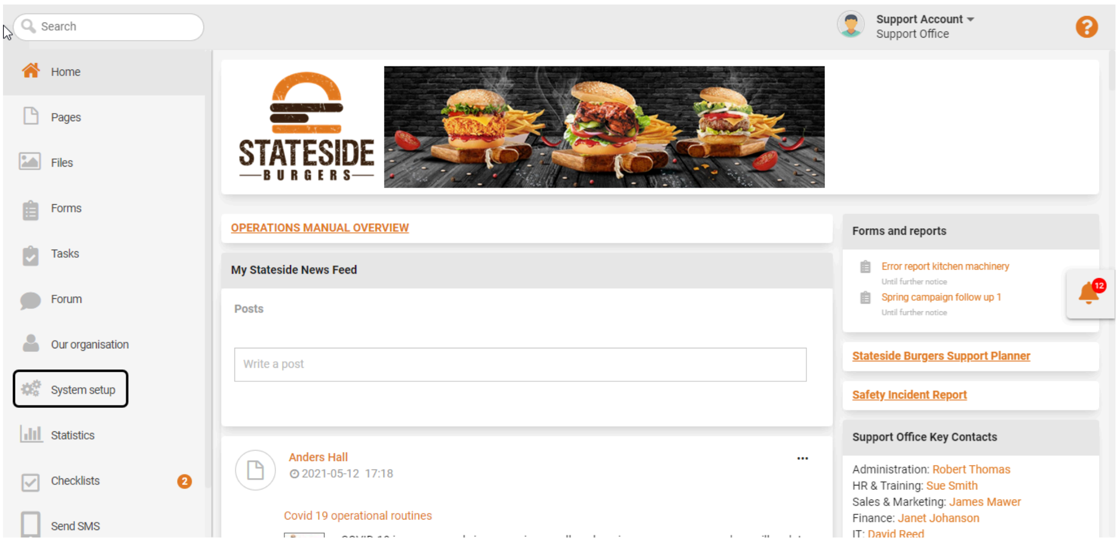
Following are some suggested examples of custom fields.

For Units: number of seats, sales area sqm, version of POS, date for lease renegotiation, etc.

For Users: language skills, accomplished internal training courses, drivers licence type, etc

The data collected in these fields are then available to view on the Unit or User page and also it can be read/written through the **Chainformation REST API**. You can use Excel and create a Power Query to extract, sort and list all data from Units and Users.

1. Once you have logged in to the **Chainformation** platform, click the **System setup** button in the left-side menu to open the **System setup** page.

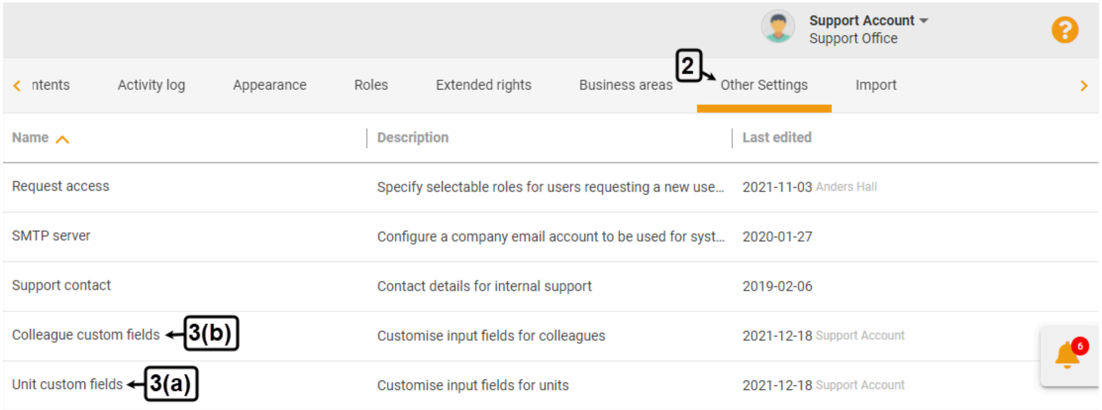


By default, you will be redirected to the **Tags** tab.

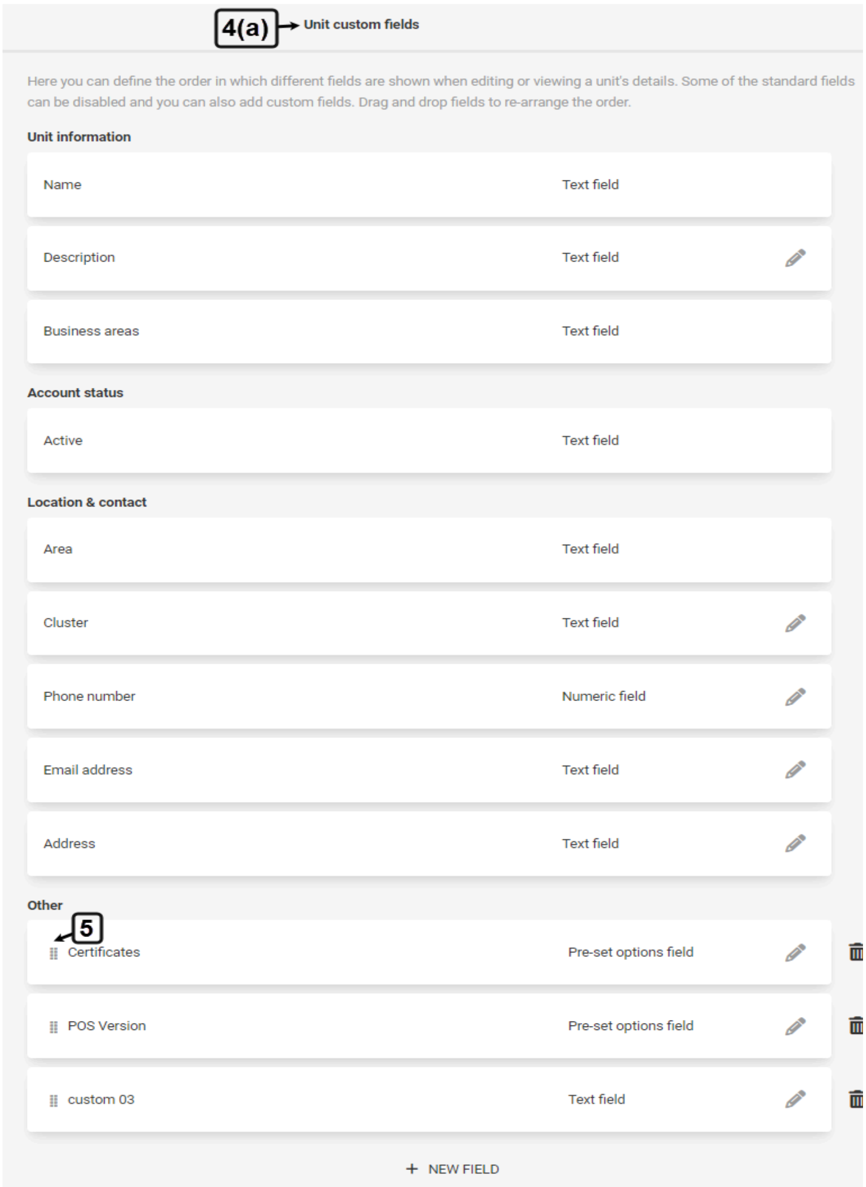
2. Click the **Other settings** button from the header menu of the **System setup** page to open the **Other settings** tab.

3(a). On the **Other settings** page, click the **Unit custom fields** button to open the **Unit custom fields** tab.

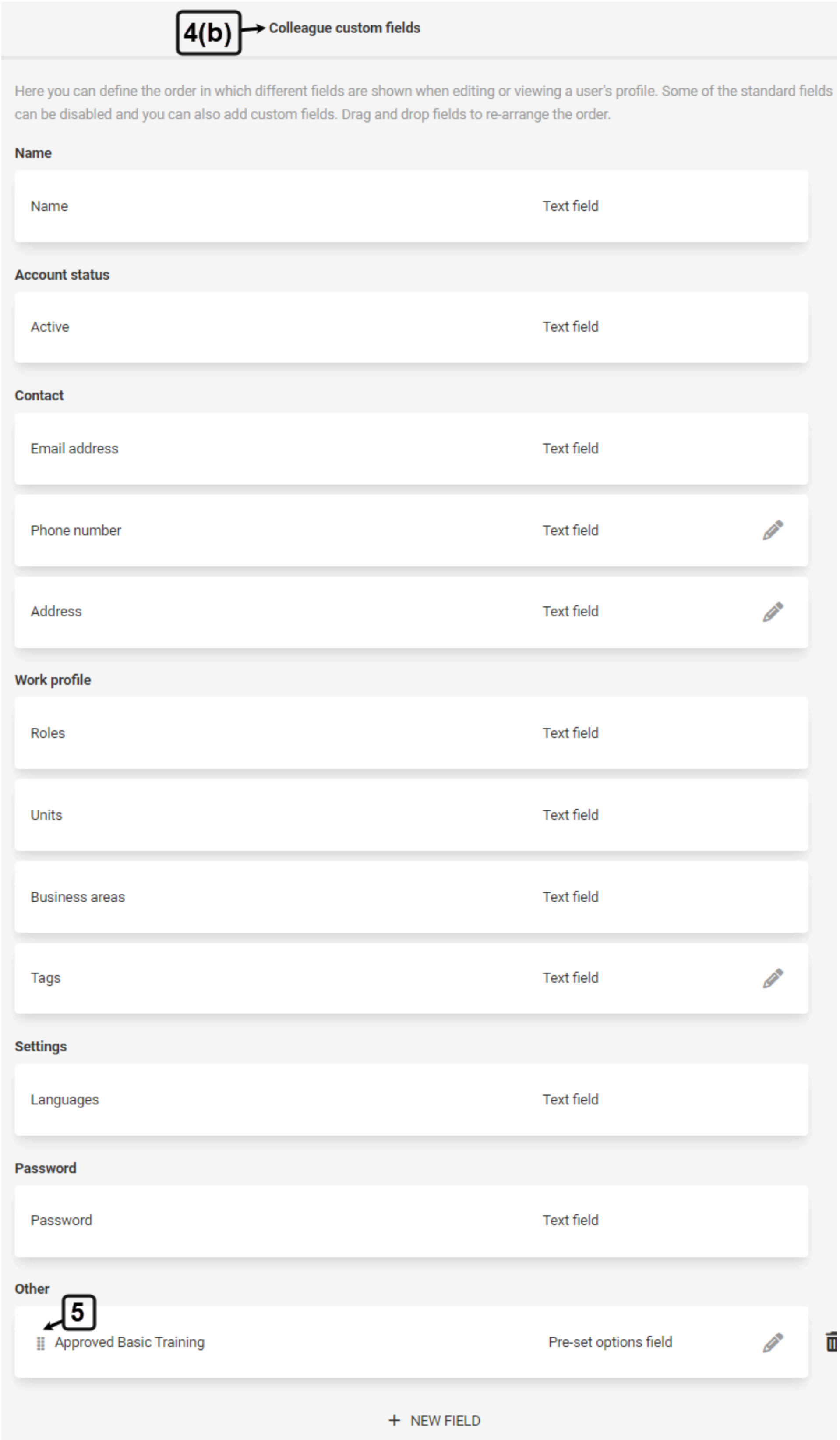
3(b). Click the **Colleague custom fields** button to open the **Colleague custom fields** tab.



4(a). On the **Unit custom fields** page, review all the standard and custom fields under their respective headers which you currently have for a unit in your organisation.



4(b). On the **Colleague custom fields** page, review all the standard and custom fields under their respective headers which you currently have for a user in your organisation.



5. On the **Unit/Colleague custom fields** page, you can define the order in which different custom fields are shown under the **Other** header when viewing or editing a unit's details or a user's profile.

If you want to rearrange the order of fields, **hover** your mouse over the **8-dots ellipsis** icon next to the names of the required fields, then drag and drop them one by one to new positions.

Note: You can't change the position of the standard fields. They are always shown in the same order as you see in the attached screenshot.

6. You can also change available options for the selected standard and all custom fields.

Some of the standard fields cannot be disabled and they have to be filled when adding a new unit/user i.e. these fields are mandatory. On the other hand, some other standard fields can be disabled and you can set them as optional fields as well.

You can **enable/disable** the standard fields which are not locked for editing and make them **mandatory/optional** as well by clicking the **Pencil** icon next to its name. (See the detailed instructions on these steps in the user guide for **New Custom Field**)

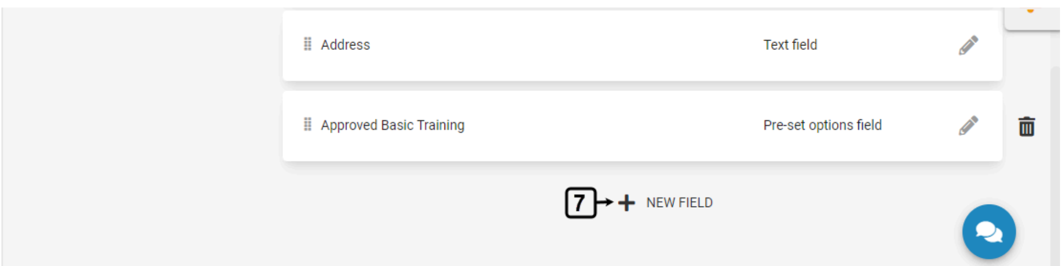
Moreover, you can also add custom fields to further explain the domain of users and units in your organisation.

Now, we will discuss how could you add and manage the custom fields of a profile as follows:

- Add a New Custom Field
- Edit a Field
- Add Translation of a Custom Field in Different Languages
- Delete a Custom Field

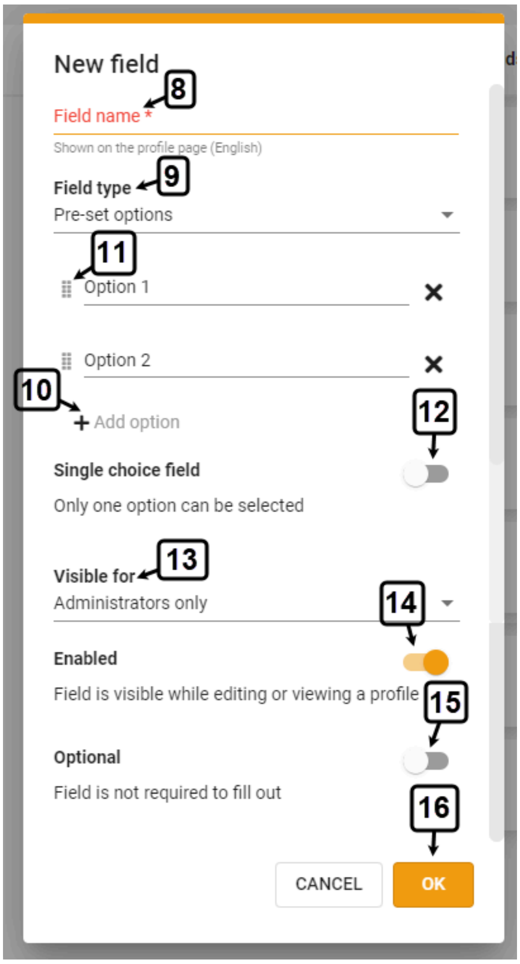
Add a New Custom Field

7. Scroll down the **Unit/Colleague custom fields** page and click the **+ NEW FIELD** button at the bottom of the page to add a new custom field for the unit/user profile.



This will open the **New field** dialogue.

On the **New field** tab, follow the navigation steps demonstrated below to add a new custom field for the unit or user profile.



8. Enter the **Field name** that will be shown on the profile page.

9. Select the **Field type** of the new custom field.

9(a). When you select the **Text** field type, a text answer will be required to fill out the selected field.

9(b). When you select the **Numeric – only numbers** field type, the users will be allowed to enter a numeric answer only while filling out the selected field.

9(c). When you select the **Calendar** field type, the users will fill out the selected field by entering a date in it or selecting a date from the pop-up calendar.

9(d). When you select the **Pre-set options** field type, the users will be allowed to fill out the selected field by selecting one or more available options.

10. If you have selected the **Pre-set options** field type, add options for this field by clicking the **+ Add option** button.

11. You can also rearrange the order of added options by **hovering** your mouse over the **8-dots ellipsis** icon next to names of the required options, then drag and drop them one by one to new positions.

12. Define whether the selected field will be a single choice or multiple choice field.

12(a). When you switch to the **Single choice field** toggle, the users will be allowed to select only one option while filling out the selected field.

12(b). When you switch to the **Multiple choice field** toggle, the users can select more than one option while filling out the selected field.

13. From the **Visible for** dropdown menu, select the roles in your organization which can see the selected field on a profile. See the User Guide for **Roles**

You can select one of the following four options in the **Visible for** field.

- Administrators only
- Everyone
- Local managers or higher
- Central managers or higher

14. Select whether the new custom field will be enabled or not.

14(a). When you switch to the **Enabled** toggle, the selected field will be visible while editing or viewing a profile.

14(b). When you switch to the **Disabled** toggle, the selected field will not be shown while editing or viewing a profile.

Note: When you disable a field, it will not be shown on the unit/user profile but its settings will remain saved on the **Unit/Colleague custom fields** page and you can make it visible again by enabling it from this page.

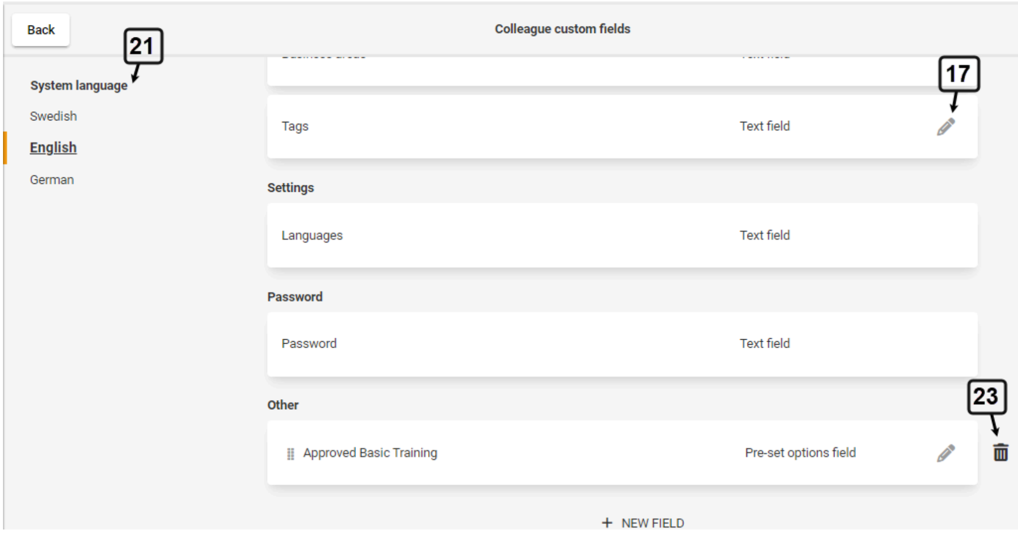
15. Select whether the new custom field will be a mandatory or optional field.

15(a). When you switch to the **Mandatory** toggle, the selected field will be required to fill out.

15(b). When you switch to the **Optional** toggle, the users could skip the selected field while creating or editing a profile if they don't have the required data to fill it.

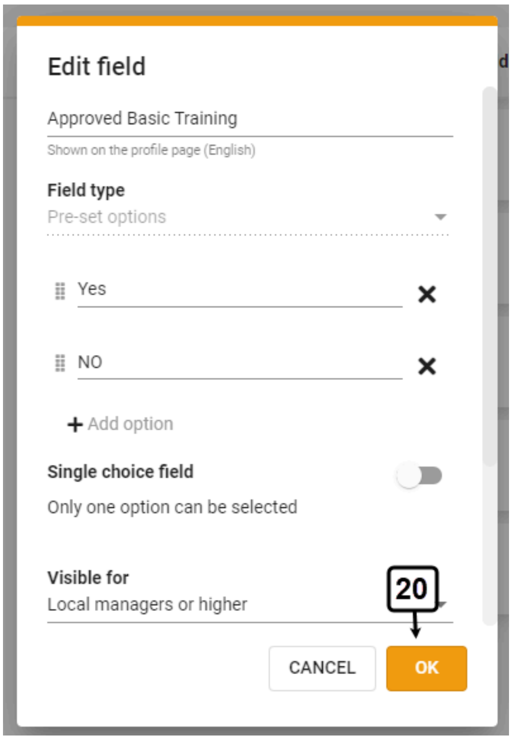
16. Once you have selected all the options on the **New field** tab, click the **OK** button to add this custom field to the unit/user profile.

Edit a Field



17. To edit a standard field that is not locked for editing or a custom field, click the **Pencil** icon next to its name on the **Unit/Colleague custom fields** page.

This will open the **Edit field** dialogue for the selected field.

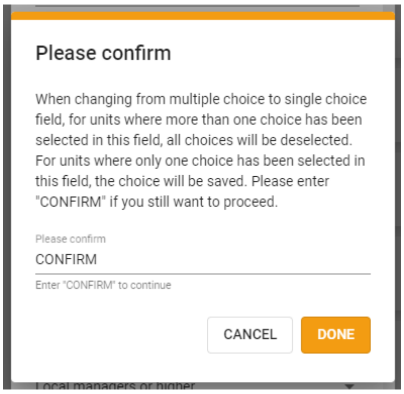


18. Make the required changes in the selected field by updating the options available for it.

Remember, when you change a custom field from multiple choice to single choice field, all choices for the selected field will be deselected for profiles where more than one choice has been selected in this field.

However, for the profiles where only one choice has been selected in this field, the choice will remain saved.

19. Enter the **CONFIRM** text in the pop-up message shown on the screen and click the **DONE** button if you still want to proceed with the change.



20. Once you have updated all the required options, click the **OK** button on the **Edit field** tab to save all the changes you have made for the selected field.

Add Translation of a Custom Field in Different Languages

Once you have added a new custom field in your default system language, you can add its translation in different available languages on the **Edit field** dialogue.

21. To add translation for a custom field, switch to your required system language.

22. Now, edit the custom field for which you want to add translation in the selected language. See the User Guide for **Edit a Custom Field**

Note: When you change settings of a custom field, this will update its settings in other languages too.

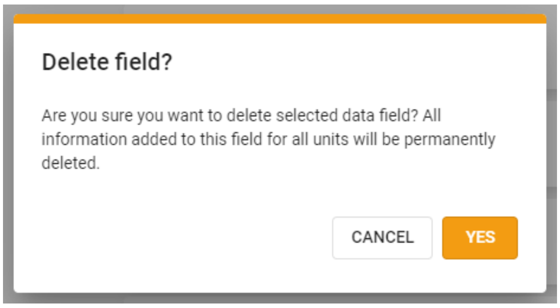
Delete a Custom Field

Remember, when you delete a data field, all information added to it for all profiles will be removed from the system database permanently and you can never retrieve this data. Therefore, disabling a custom field might be a good option instead of deleting it.

Nonetheless, follow the navigation steps demonstrated below to delete a custom field if you still want to do so.

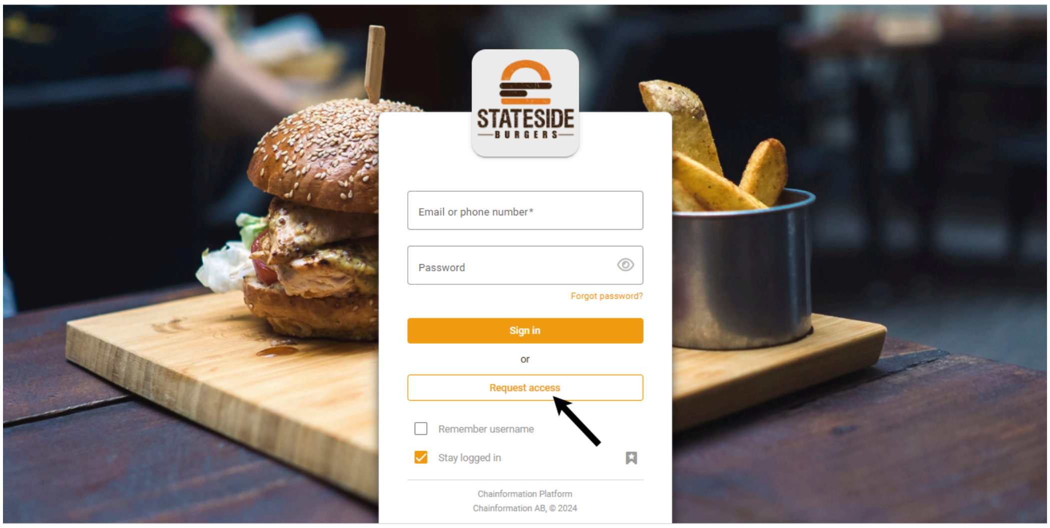
23. To delete a custom field, scroll down to its name on the **Unit/Colleague custom fields** page and click the **Bin** icon next to its name.

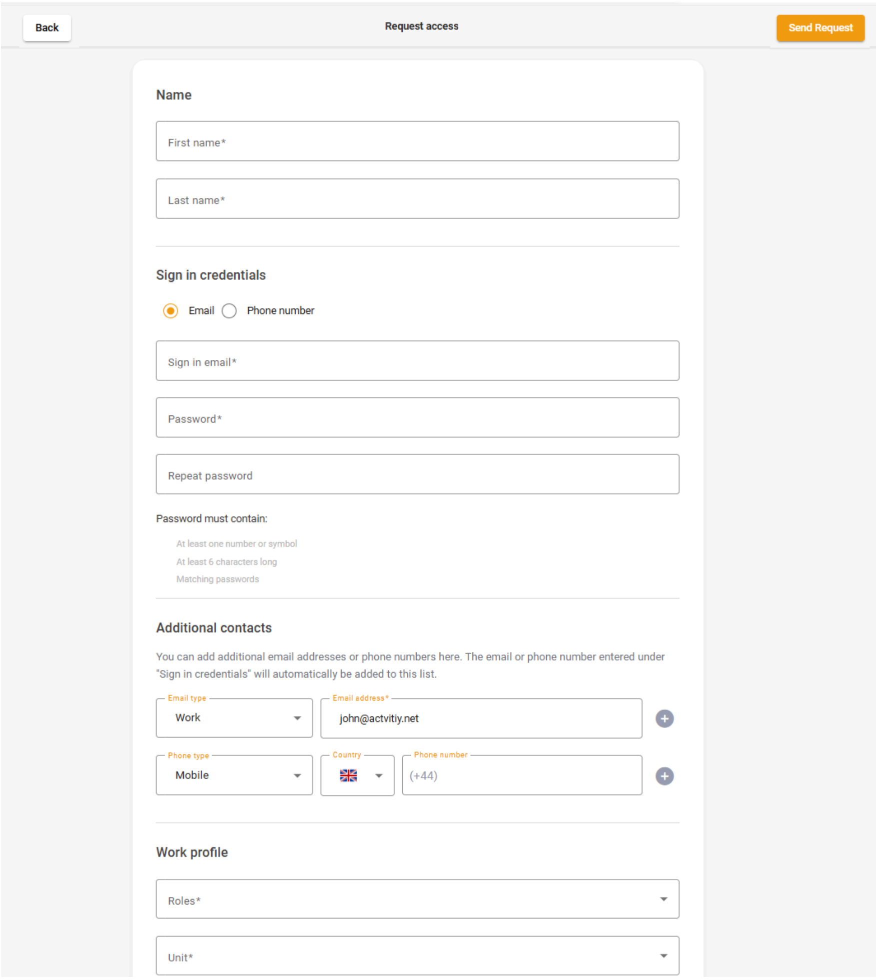
24. Click the **YES** button in the pop-up message shown on the screen to confirm your action.



Request Access Module

Request Access is a module that can simplify the management of new Users on Local Units, e.g. your stores. By activating this feature, new Users can themselves sign up and request an account. This is accessed on the Login page of your Chainfromation intranet. For example,



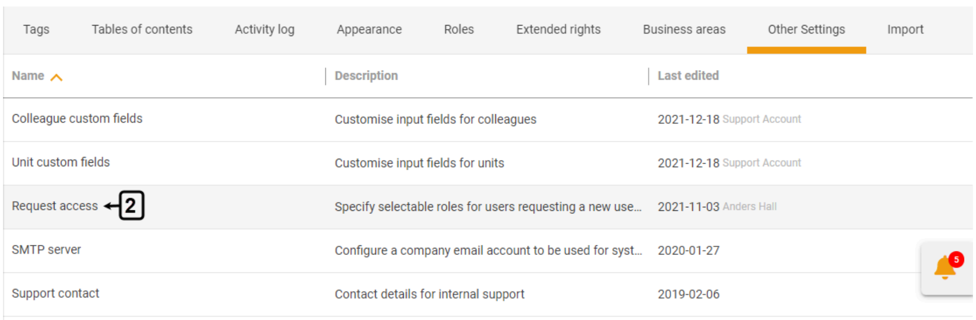


The request will then be sent to the Manager at the chosen Unit for approval.

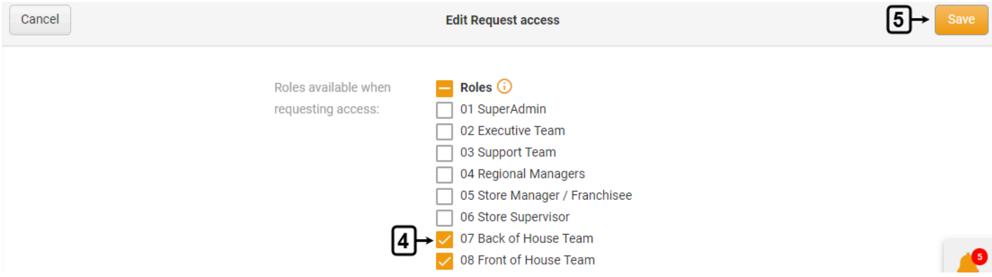
Approval or rejection is made with one click. Once the request is approved, the User gets an automated confirmation and welcome email or SMS to their chosen email or phone number added under "Sign in credentials" when requesting access.

1. To manage your request access settings, access the **Other settings** page by following the navigation steps as demonstrated in the previous section.

2. Click the **Request access** button to open the **Edit Request access** page.



On the **Edit Request access** page, you can manage the roles which should be available to the new users when they are requesting access to your organization.



3. Review the roles which are currently available for the request access feature.

4. **Check** the **checkbox** next to the name of a role to make it available for the request access feature.

Remember, you should enable the request access feature for local workers and other roles with a limited access level in your organization only. See the User Guide for **Roles**

Other local, central and global roles with a higher access level should only be added to your organization by the corresponding managers and admins. See the User Guide for **Colleagues**

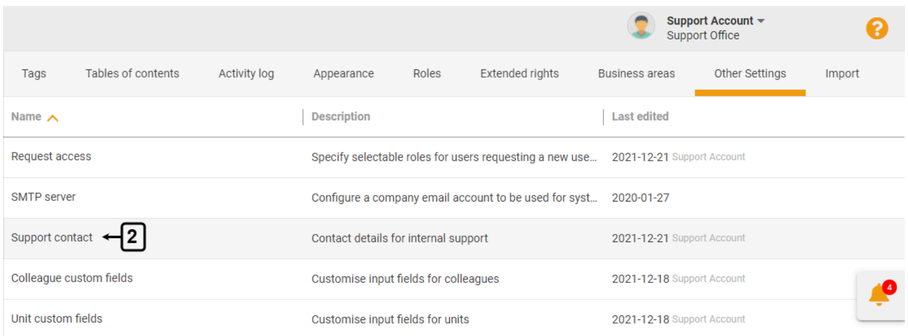
5. Once you have selected all the required roles, click the **Save** button in the top-right corner of the **Edit Request access** page to save all the changes you have made.

Now, the selected roles will be available to select in the **Roles** field on the **Request access** page when the new users access it from the **Login** page of your organization. See the User Guide for **Request Access**

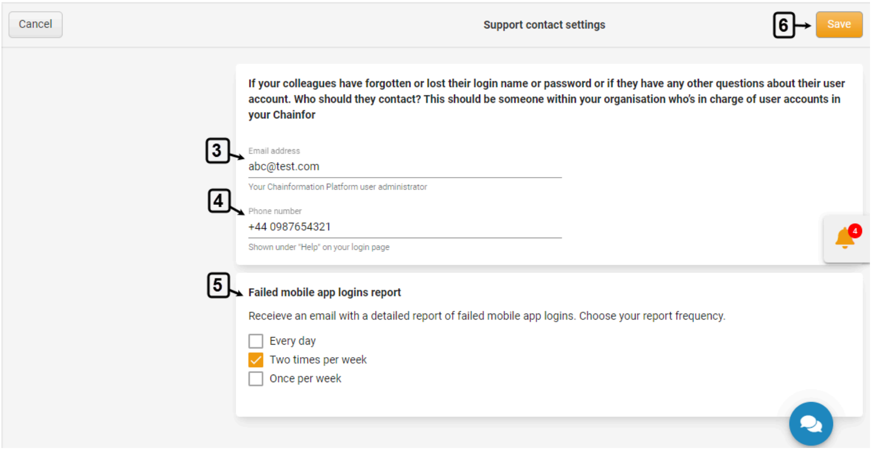
Manage Support Contact Settings

1. Access the **Other settings** page by following the navigation steps as demonstrated in the previous section.

2. Click the **Support contact** button to open the **Support contact settings** page.



On the **Support contact settings** page, you can manage the contact details of the admin who is in charge of all user accounts in your organization.



3. Enter or update the **Email address** of your **Chainformation** platform user administrator.

4. Enter or update your support contact **Phone number**.

This is the email address and phone number that will be shown under “**Help**” on the login page of your organization’s internet.

Furthermore, the user administrator of your **Chainformation** platform will receive an email at a specified frequency with a detailed report of failed mobile app logins.

5. You can choose your **Failed mobile app logins report** frequency as follows:

- Every day
- Two times per week
- Once per week

6. Once you have entered your support contact details correctly, click the **Save** button in the top-right corner of the **Support contact settings** page to save all the changes you have made.

Now, your colleagues can contact this phone number and/or email address if they have forgotten or lost their login name or password. Furthermore, they can also contact this phone number and/or email address if they have any other questions about their user account.

Manage SMTP Server Settings

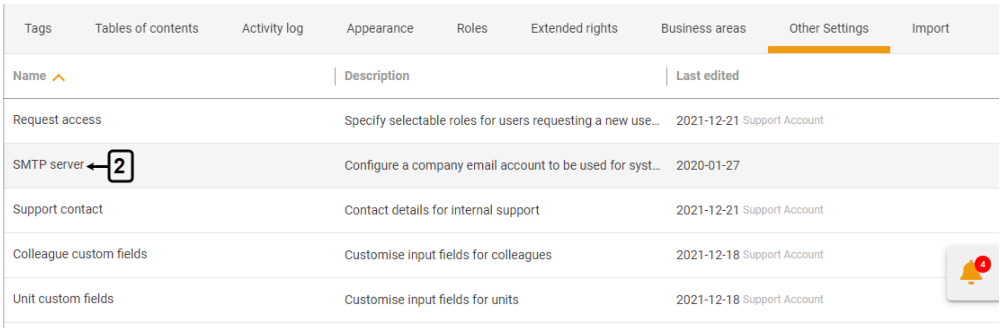
This feature will allow your Chainformation Platform to send any email based message, reminders, etc. from YOUR email address, eg your domain. If you don't change this, all system emails will be sent from the default email address: noreply@azureserver.net

You might need to get help/information from your email-administrator.

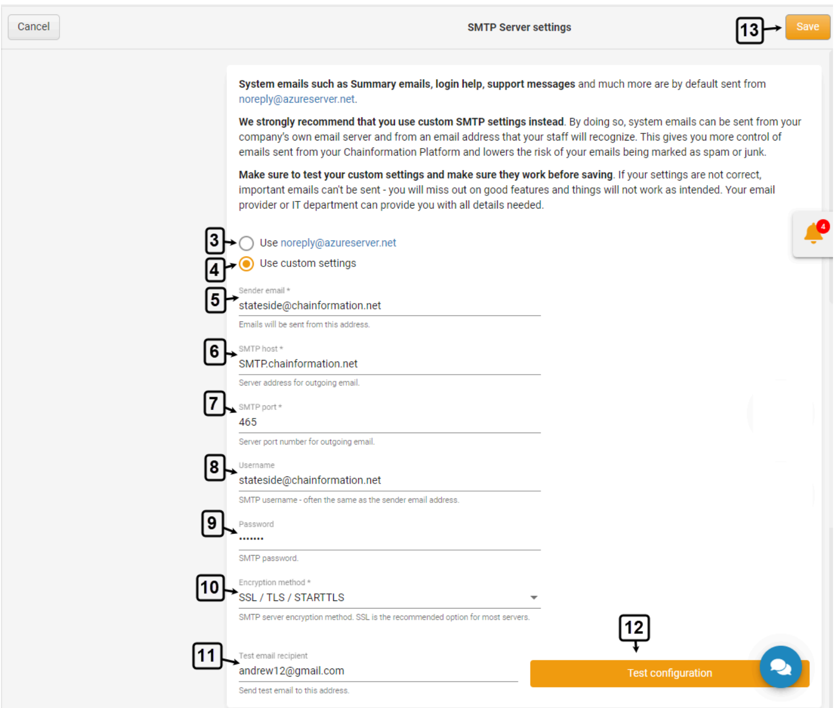
We HIGHLY recommend you to update these settings.

1. Access the **Other tools and settings** page by following the navigation steps as demonstrated in the previous section.

2. Click the **SMTP Server** button to open the **SMTP Server settings** page.



On the **SMTP Server settings** page, you can set up the email server and address that will be used to send your system emails such as summary emails, login help, support messages, etc.



3. By default, your system emails are sent from noreply@azureserver.net.

However, we strongly recommend that you should use **custom SMTP settings** instead of the default email.

In this way, your system emails will be sent from your company's own email server and address that your colleagues will recognize. This gives you more control of emails sent from your **Chainformation** platform and lowers the risk of your emails being marked as spam or junk.

Now, follow the navigation steps demonstrated below to set up your email server and address.

4. **Check** the **checkbox** next to the **Use custom settings** option on the **SMTP Server settings** page.

5. Enter the **Sender email** address that will be used to send your system emails.

6. Enter your **SMTP host server address** for your outgoing email.

7. Enter your **SMTP server port number** for your outgoing email.

8. Enter your **SMTP Username**.

Note: SMTP username is often the same as the sender email address.

9. Enter your **SMTP Password**.

Note: If you have **Google Workspace** or using an individual Google account to set up this SMTP server, you need to create an app password for it from your Google account settings. See the user guide for **Google App Passwords**

10. Enter your **SMTP server encryption method**.

Note: SSL is the recommended option for most SMTP servers.

However, you should consult your email provider or IT team for correct settings of your SMTP server.

11. Once you have entered all the details on the SMTP Server settings correctly, enter a valid **Test email recipient** to send a test email to this address.

12. Click the **Test Configuration** button to send a test email to the selected email address.

Now, check your test email recipient inbox to confirm if you have received the test email to the selected email address or not.

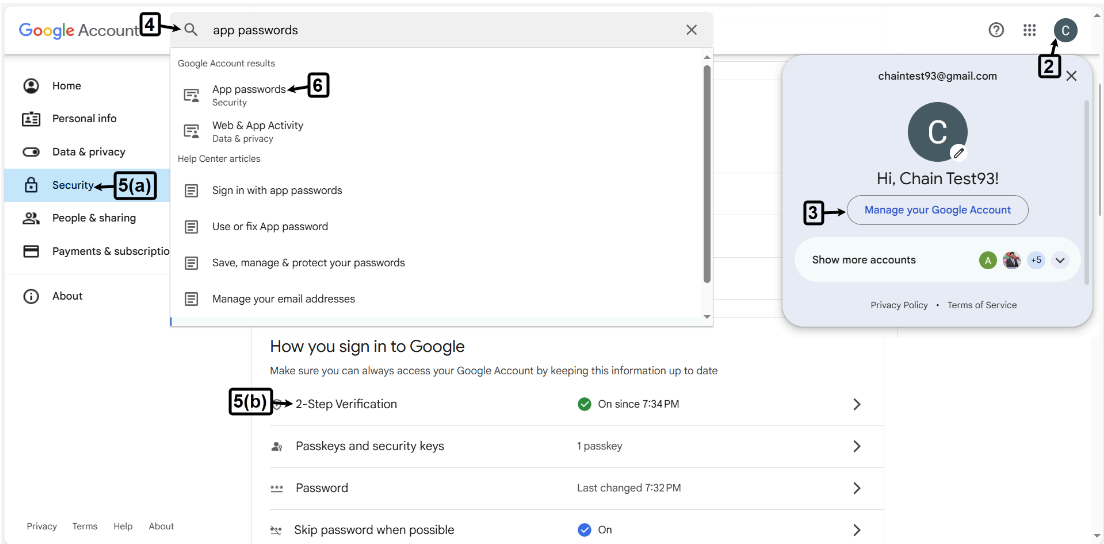
If the configuration fails and you do not receive the test email, ask your email provider or IT team to figure out the problem and correct your SMTP server settings accordingly.

13. Once you have configured your SMTP server settings successfully, click the **Save** button in the top-right corner of the page to save these custom settings.

Your system emails will be sent from the selected SMTP server and email address from now on.

Create a Google App Password for your SMTP Server

Follow the navigations steps demonstrated below to create a Google app password for your custom SMTP server on the Chainformation platform.



1. Open **Gmail** app for your Google Workspace or personal account.

2. Click your profile picture in the top right corner of your **Gmail homepage**.

3. Click the **Manage your Google account** button to open your account settings page.

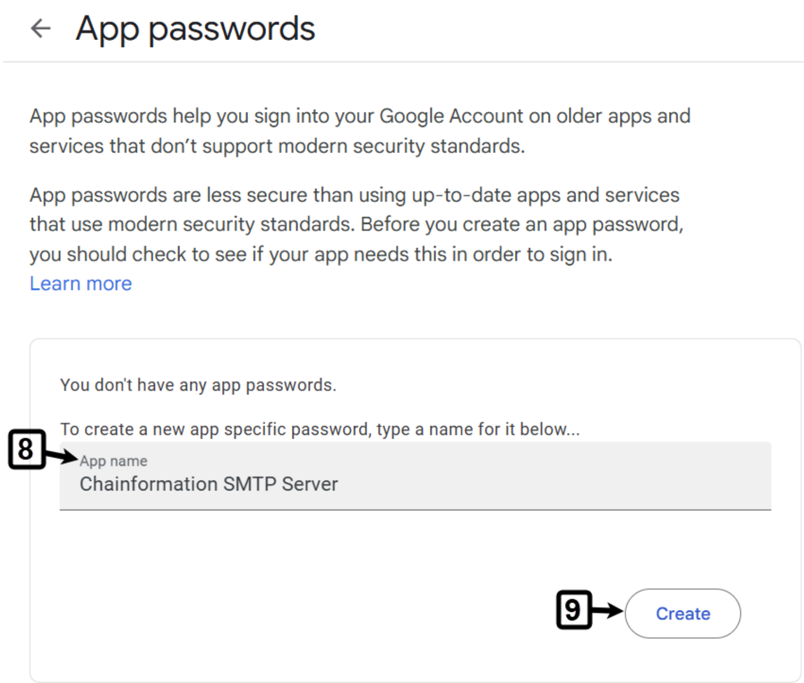
4. Search for the **app passwords** setting in the **search bar** on your account settings page.

Note: You must have admin access for your Google Workspace account to access the app password setting. If you are using your personal Google account, you must have enabled 2-Step Verification for sign in. Otherwise, you can't access the app password setting.

5. You can turn **ON 2-Step Verification** for sign in to your Google account from the **Security** tab on your settings page.

6. When you find the app passwords option in the settings search bar, click on this setting to create a new app password.

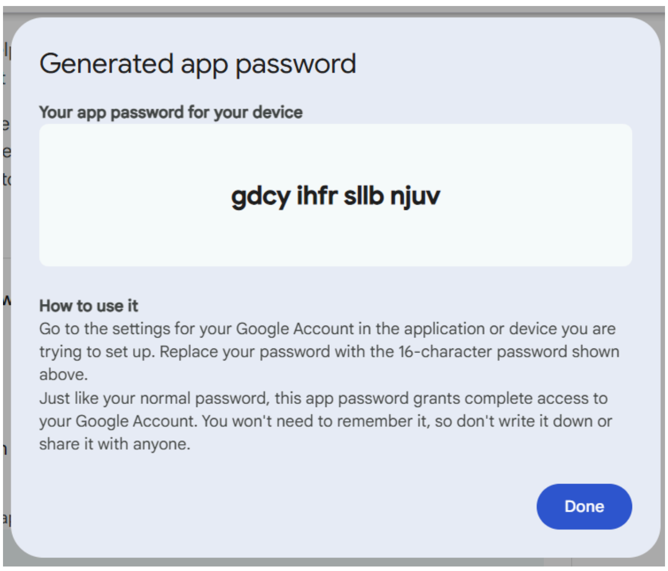
This will redirect you to the **App passwords page** after entering your Google account password.



8. Enter the **App name** for which you are creating this password e.g. Chainformation SMTP server.

9. Click the **Create** button to create a new password for this app.

This will create a 16-character password that you can use to set up the SMTP server on your Chainformation platform. <u>Refer to item 9 on user guide for **Manage SMTP Server Settings**</u>



Remember, you cannot use the same Google App password twice on a specific application. So, if you change your SMTP settings, you should create a new app password for the updated SMTP server.

Google also recommends you should not use the same password on different devices or apps. So, you should create a unique app password for each device or application you use with your Google account.