Superuser Guide

TxSmartBuy Superusers serve as the security coordinator for your organization's access and settings within TxSmartBuy (TSB).

Superuser Account Views

Superusers can add/edit/deactivate all addresses, view purchase requisitions and modify purchase orders for your entire state agency or CO-OP entity, create/edit/deactivate users and manage user roles.

Superusers are also authorized to request edits to purchaser accounts, including switching Purchase Orders to another purchaser if one of your purchasers leaves.

Each agency or CO-OP is authorized to have two Superusers and two User Managers. Only CPA/TPASS can create and assign Superuser and User Manager roles.

User Roles (NEW April 2016)

<u>User Manager</u>
-    Add/edit addresses
-    Add/remove users
-    Purchase Order view only

<u>Agency Purchaser</u>
-    Issue Purchase Orders
-    View/modify any Purchase Order issued by the agency

<u>Single Purchaser Access</u>
-    Issue Purchase Orders
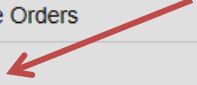-   View/modify Purchase Orders issued by the user only

<u>Agency View</u>
-    View only all Purchase Orders issued by the agency
-    Purchasing managers/directors, accounts payable or anyone who may need to view agency Purchase Orders as a logged in user

User Management

From the My Account screen, select "Users" to view a complete list of every user in your agency or CO-OP. You can also select "User Management" from the drop down.

TxSmartBuy

Glenn Hegar Texas Comptroller of Public Accounts

My Account

Overview
Addresses
Update Your Password
Update Your Security Questions
Purchase Requisitions
Purchase Orders
Favorite Orders
Users

TxSmartBuy User Survey

Greetings,

We're looking for your input on what features
Please take a few minutes to complete the on

Click here to take TxSmartBuy User Survey

Thank you for your time.

ATTENTION STATEWIDE PURCHASERS:

Certain vendors' items have been temporarily removed from the

View **Vendor List (.xls)**

FREQUENTLY PURCHASED ITEMS

| odity Code, Supplier Part #, NIGP or Keyword | Q Search | | TxCPA Cody Hays Account ▾ | Saved Carts ▾ | 🛒 **0** items |

ontracts ▾   **Reports** ▾   **Help**

Overview
Addresses
Update Your Password
Update Security Questions
Purchase Requisitions
Purchase Orders
Favorite Orders
User Management

Sign Out

TxSmartBuy User Survey

Greetings,

We're looking for your input on what features y   enefit SmartBuy users.
Please take a few minutes to complete the onli

Click here to take TxSmartBuy User Survey

Thank you for your time.

From the User List, you can Create User, Edit, Deactivate or Reactivate.

HOME / MY ACCOUNT / USERS

My Account

My Account	
Overview	
Addresses	
Update Your Password	
Update Your Security Questions	
Purchase Requisitions	
Purchase Orders	
Favorite Orders	
Users	

Users

⊕ Create User

USER LIST

Name	Phone	Access		
Name Tom Smitherson **E-mail** t@o.com	**Phone** **Role** CPA Purchaser Center	**Access** true	✎ Edit	🗑 Deactivate
Name Danny Boy **E-mail** db@cpa.texas.gov	**Phone** (512) 555-5555 **Role** CPA User Manager	**Access** true	✎ Edit	🗑 Deactivate
Name **E-mail** elida.vasquez@cpa.texas.gov	**Phone** (512) 512-4679 **Role** CPA Purchaser Center	**Access** true	✎ Edit	🗑 Deactivate
Name Bradley Payne **E-mail** bpay921@cpa.texas.gov	**Phone** (512) 936-0285 **Role** CPA Agency Purchaser Center	**Access** true	✎ Edit	🗑 Deactivate
Name **E-mail** frank.guerrero@hhsc.state.tx.us	**Phone** **Role**	**Access** false	✎ Edit	＋ Reactivate

When selecting Create User, you'll simply fill in the required fields as well as select the appropriate role for that user.

Create a new User

Back to Users

* indicates required field

*User Type:
[role required ▼]

*First Name
[   ]

*Last Name
[   ]

*Email
[   ]

Phone
[   ]

＋ Add User

Once the required information is entered and "Add User" is selected, the user will receive an email with their login information.

*User Type:
Single Purchaser

*First Name
cody

*Last N | Message from webpage

hays

⚠ New user has been created and a welcome email has been sent
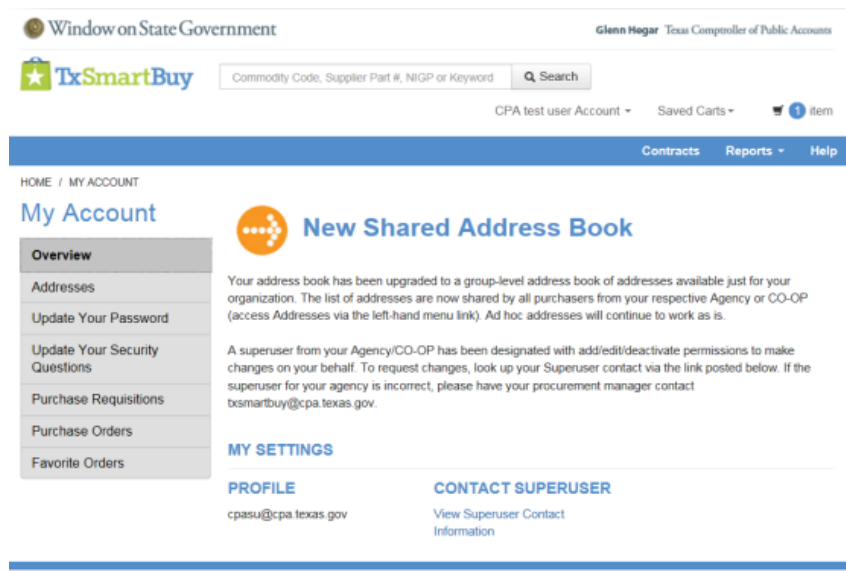
*Email
codyh

OK

Phone
512-4

+ Add User

Address Book Management (NEW June 2015)

The TSB system launched in 2014 with individual address books (native to the ecommerce platform TSB uses). As of June 2015, the TxSmartBuy system now provides superusers with address book management for your Agency/CO-OP. The Comptroller's office has upgraded the system to provide a group-level address book with all of your shipping and billing addresses combined. The list of addresses are now shared by all purchasers from your respective Agency or CO-OP (access Addresses via the second link in the left-hand menu). Ad hoc addresses will continue to work as is.

Purchasers have been advised to contact their superuser to request address edits. A list of superuser contacts is linked from the My Account page.

Please send any edits for your superuser listing to txsmartbuy@cpa.texas.gov.

Window on State Government | **Glenn Hegar** Texas Comptroller of Public Accounts

TxSmartBuy | Commodity Code, Supplier Part #, NIGP or Keyword | 🔍 Search

CPA test user Account ▾   Saved Carts ▾   🛒 1 item

Contracts   Reports ▾   Help

HOME / MY ACCOUNT

My Account

Overview
Addresses
Update Your Password
Update Your Security Questions
Purchase Requisitions
Purchase Orders
Favorite Orders

New Shared Address Book

Your address book has been upgraded to a group-level address book of addresses available just for your organization. The list of addresses are now shared by all purchasers from your respective Agency or CO-OP (access Addresses via the left-hand menu link). Ad hoc addresses will continue to work as is.

A superuser from your Agency/CO-OP has been designated with add/edit/deactivate permissions to make changes on your behalf. To request changes, look up your Superuser contact via the link posted below. If the superuser for your agency is incorrect, please have your procurement manager contact txsmartbuy@cpa.texas.gov.

MY SETTINGS

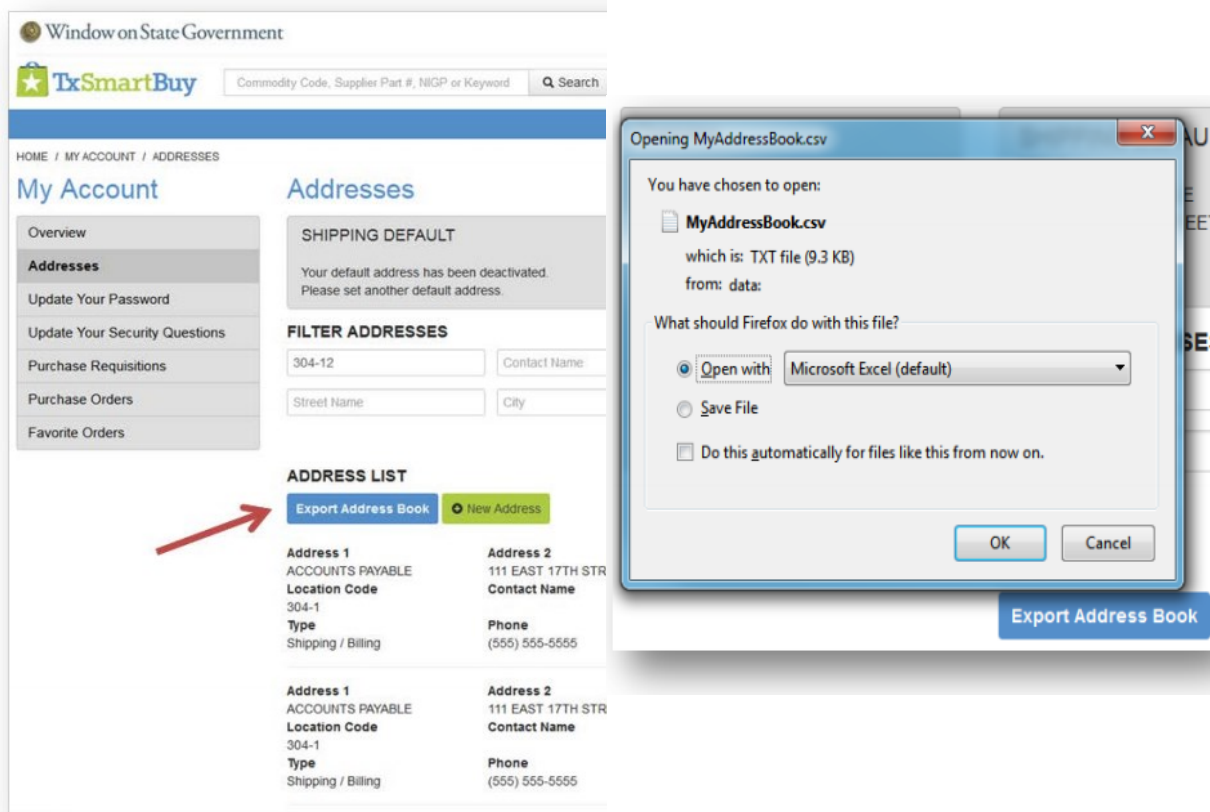**PROFILE**
cpasu@cpa.texas.gov

CONTACT SUPERUSER
View Superuser Contact Information

Addresses page

As the TSB superuser, you have additional functions on the Addresses page. Superusers are authorized to add/edit/deactivate the address listings on behalf of the organization.

Export Addresses

As superuser, you can download the entire address list as a csv file. In the Address List section, select the blue "Export Address Book" button.

NOTE: If you need to edit, deactivate or add several addresses, you can make the edits in the file and send a request to import to the TxSmartBuy Helpdesk.

Please add a column in front of all the other columns and indicate per row the action need: Add, Edit, Deactivate.

Email the file with your update request to txsmartbuy@cpa.texas.gov

Add Addresses

To add an address, select the "New Address" button to enter an address your purchasers plan to use on several purchase orders. (Purchasers can use the Ad Hoc address feature for unique addresses.) Certain fields are required as indicated by an asterisk. The Add Address screen will load a form with fields that can be stored in an address listing.

New Address fields:
*Address Type:
(select one or both)

- Shipping
- Billing

Location Code
(optional reference number up to 10 characters)
Contact Name
Phone
*Address 1
  Address 2
  Address 3
*City
*State
*Zip

Edit Address

Back to Address Book

* indicates required field

*Address Type: ☐ Shipping ☑ Billing

Location Code	Contact Name	Phone
304-1		(555) 555-5555

*Address 1	Address 2	Address 3
ACCOUNTS PAYABLE	111 EAST 17TH STREET	

*City	*State	*Zip
AUSTIN	TX	78701

⚙ Update Address   ✖ Cancel

Make any edits and select the "Save Address" button.
Select "Back to Address Book" or "Cancel" to go back to the Address List.

Once you save a new address, it will appear in the address list, which defaults to a sort order of ascending location codes.
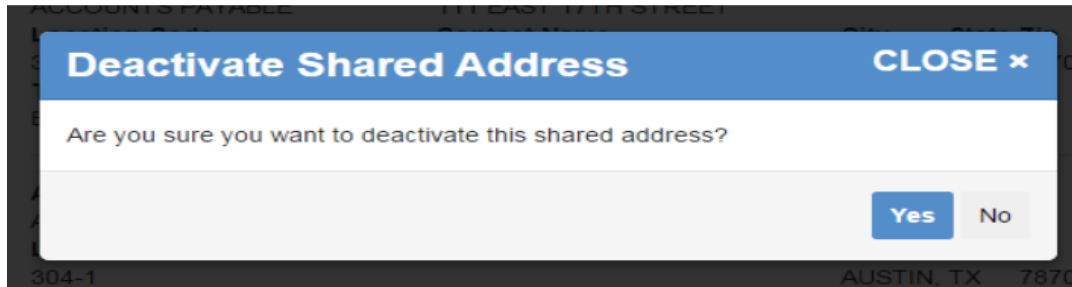
Edit Addresses

Select the gray "Edit" button to the right of an address listing.

The Edit Address screen will load with the same fields that appear on the Add Address screen. The fields are pre-populated with the existing address values.
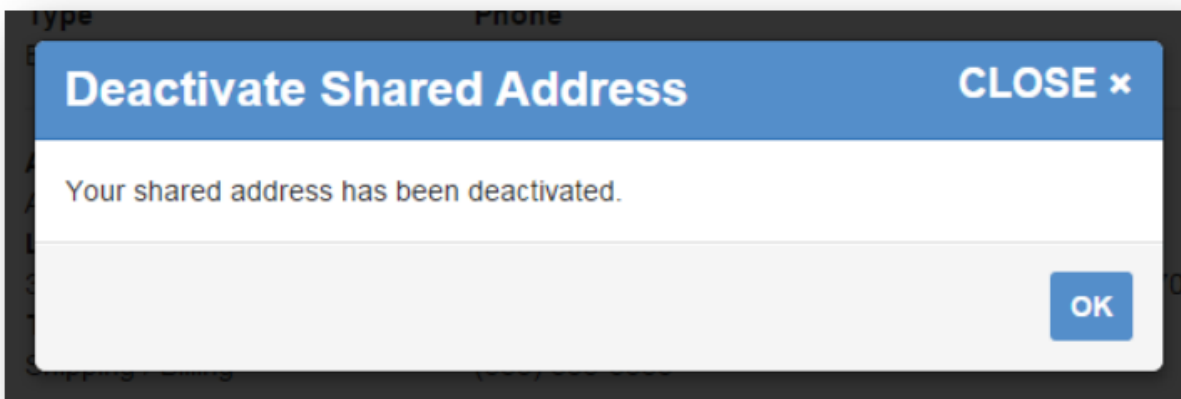
Make any edits and select the "Update Address" button. Select "Back to Address Book" or "Cancel" to go back to the Address List.

Deactivate Addresses

Select the gray "Deactivate" button to the right of an address listing. A confirmation message box will appear as a screen overlay.

If you select the "Yes" button, the message box will update to confirm the address was deactivated.

The address will disappear from the address list. It will not be permanently deleted from the TxSmartBuy system since it may have been used on an existing purchase order.

Default Addresses

The Addresses page indicates your default shipping and billing addresses in a gray box at the top of the page. If you set a default address, it ONLY applies to your individual account. This applies to purchasers and superusers.

To set an address as the default, select either the "Set My Default Shipping" or "Set My Default Billing" -- or both -- to assign the defaults for your individual account.

Once selected a confirmation message will appear. The Defaults will be indicated by blue buttons in the Address List.

If you have set up an address with just one address type, only the related "Set My Default…" button will appear in the Address List.

The default billing address will appear during the next user session upon check out. An ad hoc address CANNOT be entered for the billing address.

Filter Addresses

Search filters are provided to find or narrow down the number of address records displayed. Filter options include Location Code, Contact Name, Address Type, Street Name, City and Zip Code.

The "Clear Filters" button will set the Address List back to the default list of address records.