Installer and Company management

Version 5.1

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Contents

Introduction

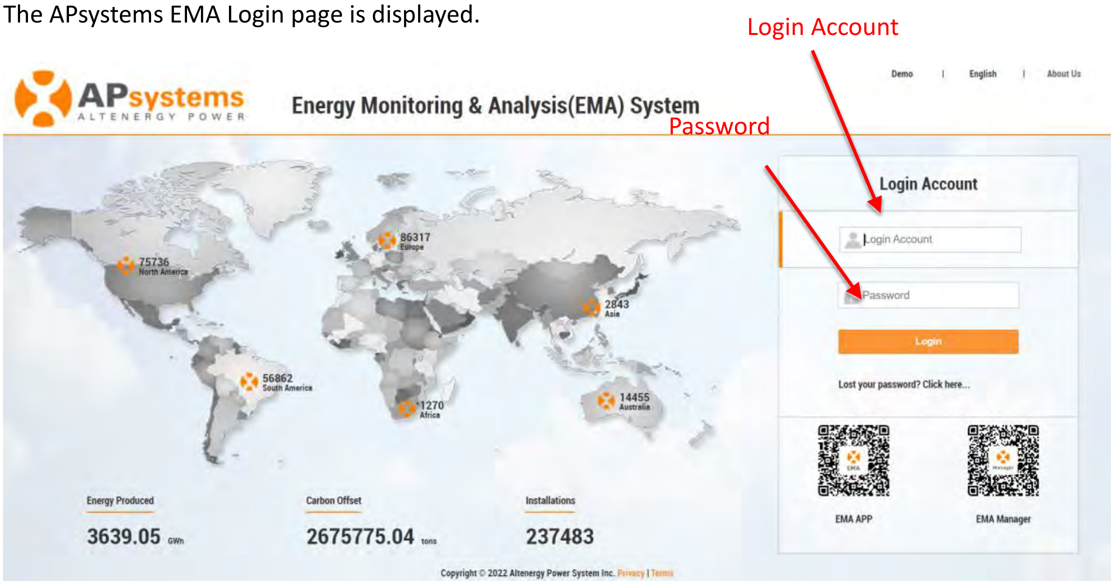
Installer account registration and management is about registration of management accounts for installers and management of the basic information already registered.

Staff account registration and management is about registering the accounts for company staffs with the appropriate authority to assist in the management of staff accounts.

1. Log onto EMA Website

- Go to http://apsystems.com/
- Click the orange "EMA Login" in the upper right corner of the screen to enter the EMA login page，

The APsystems EMA Login page is displayed.



Note

- You will be issued a permanent login account and a temporary password when you complete the Installer Training of APsystems. Contact APsystems Technical Support to register for Installer Training (go to https://usa.apsystems.com/resources/training, or call 1.844.666.7034).

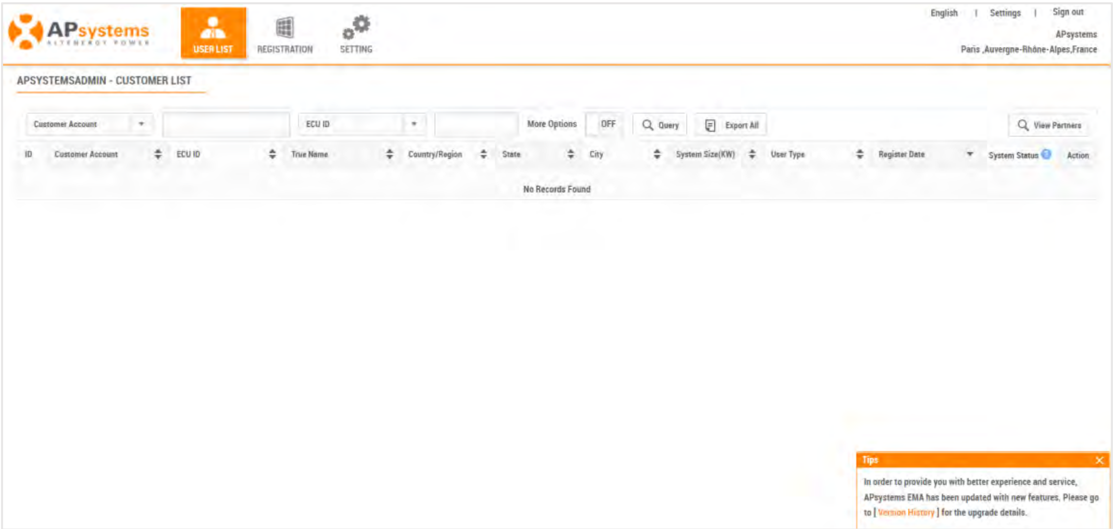
- Enter your “Login account” and “Password”
- Press the “Login” button.

1. Log onto EMA Website

Note

- The Password is case sensitive.
- If you forget your password, select “Lost your password? Click here …”.

Your specific Customer List page is displayed.

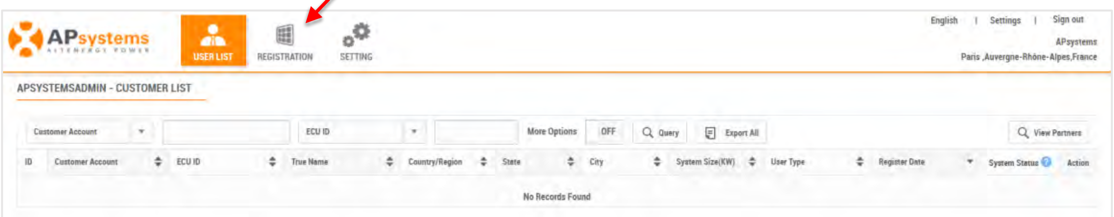


Note

You won’t have any customers in your Customer List the first time you log into the system.

➢ Select the REGISTRATION icon at the top of the page.

Registration



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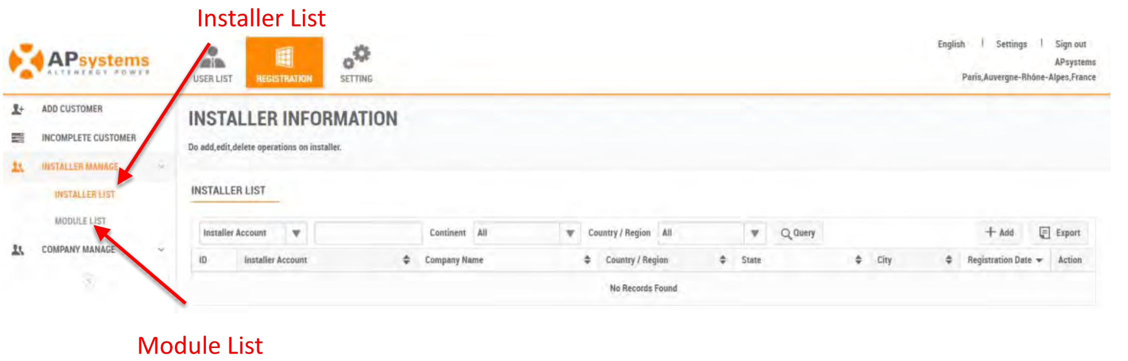
2. Installer Manage

The installer manage consists of two parts： Installer list and Module list.

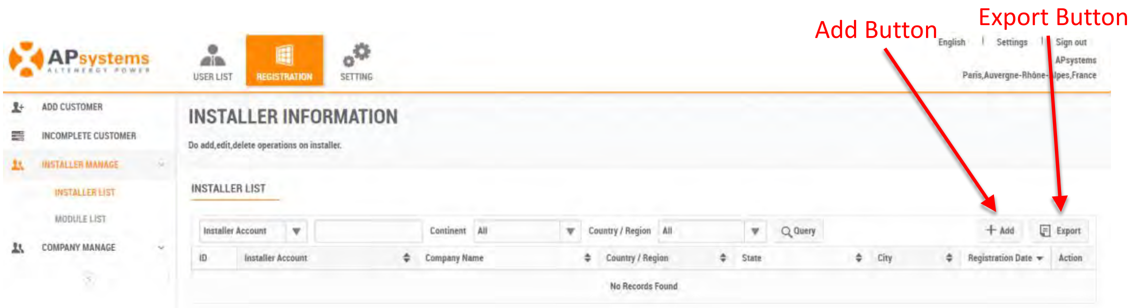
- Select the “INSTALLER MANAGE” in the left side bar.
- The sub-menu areas are displayed under “INSTALLER MANAGE”.



2.1 Add a New Installer account

- Select the “INSTALLER LIST” in the left side bar.

The installer management page is displayed.

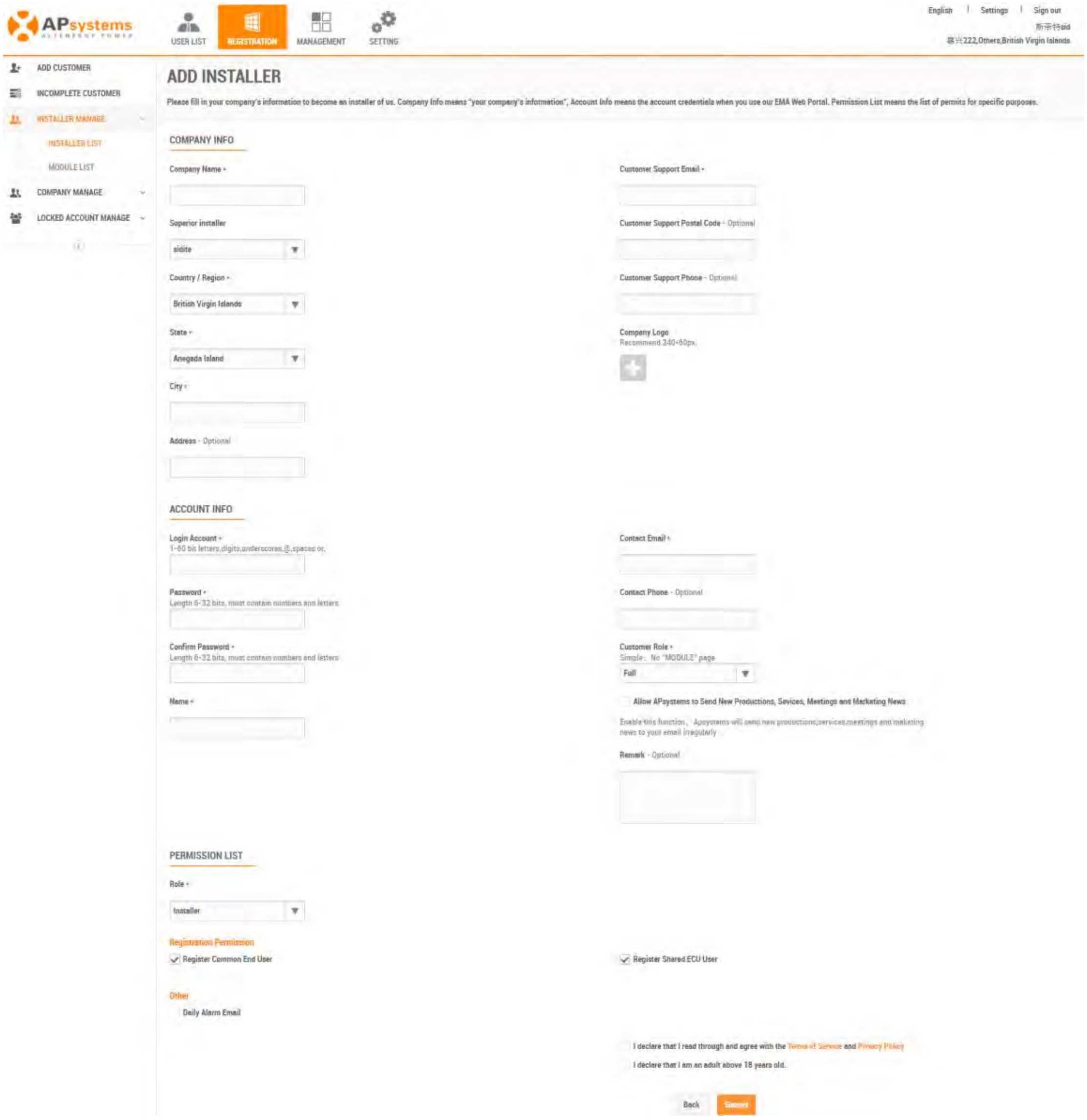


- Select the “Add” Button.

Continued…

2. Installer Manage

The account basic information adding page is displayed.



➢ Enter information as prompted.

Note

- "*" is a required field.
- Only “letters”, “numeric digits”, “underscores”, “@”, “spaces”, and “.” Can be used when entering a login account. And the login account 6 and 32 digits in length and must contain numbers and letters; passwords are case-sensitive

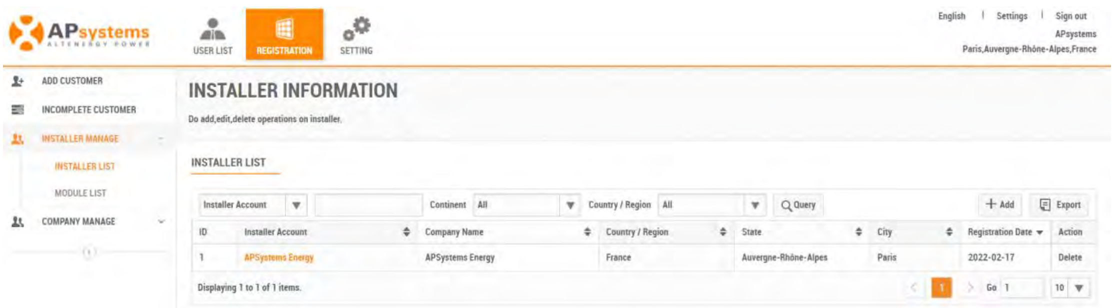
➢ Select the “Submit” button.

2.2 Installer Account Information Management

2.2.1 Edit Basic Account Information

➢ Select the “REGISTRATION” icon at the top of the page.
➢ Select the “INSTALLER MANAGE” in the left side bar.
➢ Select the “INSTALLER LIST” in the left side bar.

A list of installer registrations is displayed.



Note

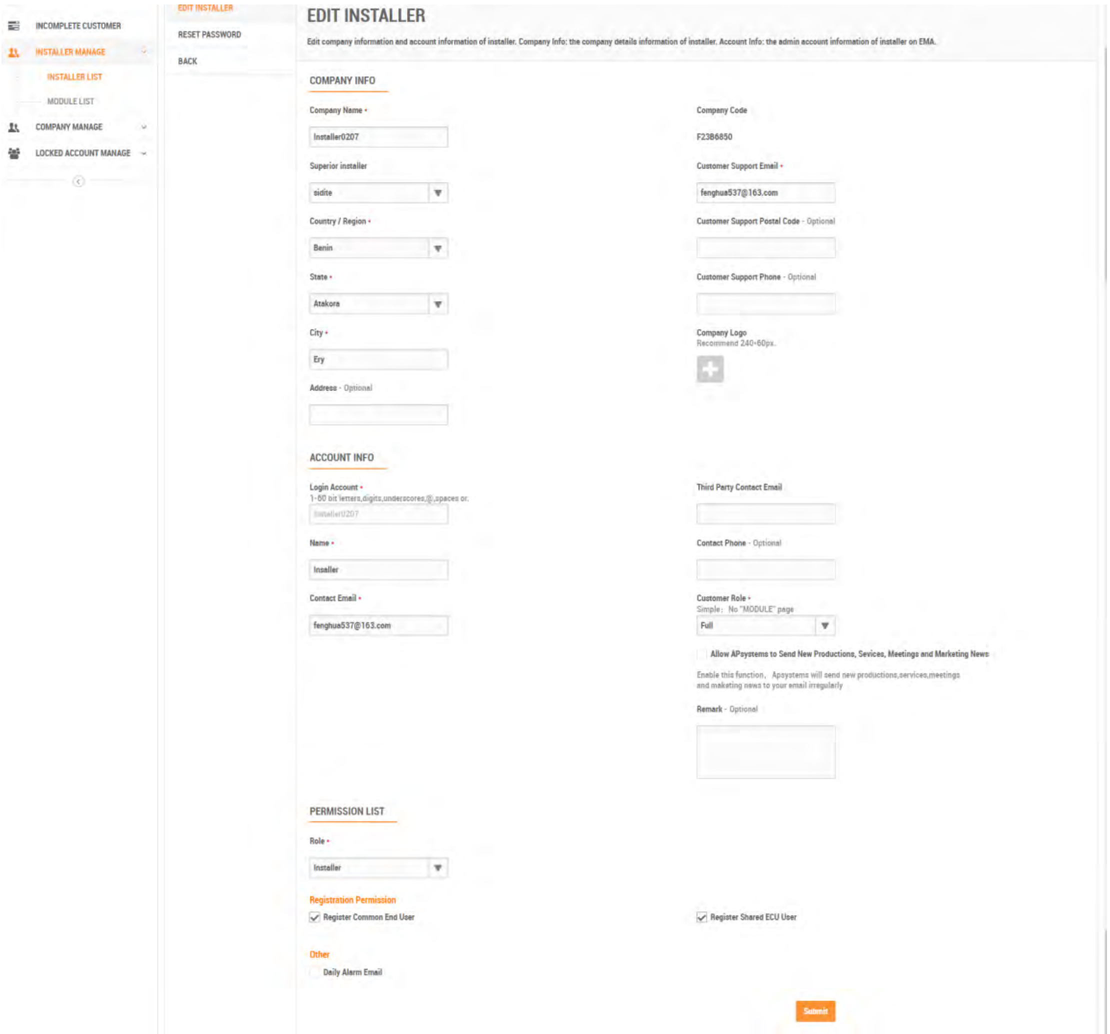
To delete an account, select the "Delete" button to the right of the installer record.

➢ Select the installer account you want to edit.

The installer account information edit page is displayed.

Continued...

2. Installer Manage

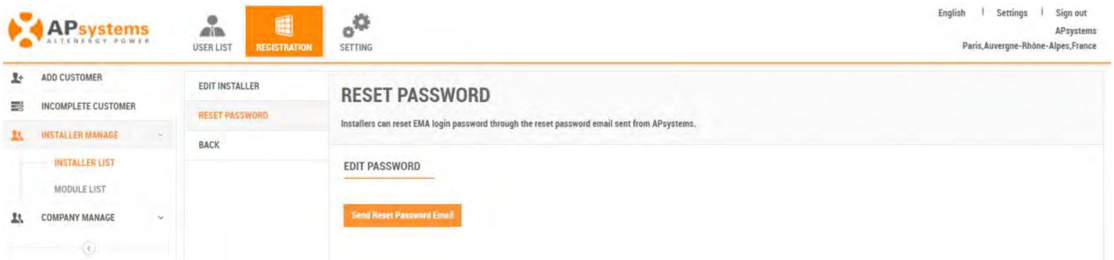


- ➢ Enter new information.
- ➢ Select the “Submit” button.

2. Installer Manage

2.2.2 Reset Password

- Select the “RESET PASSWORD” button.
- Press the “Send Reset Password Email” button



Note

The changing password link in the email is valid for 48 hours.

2.3 Module Management

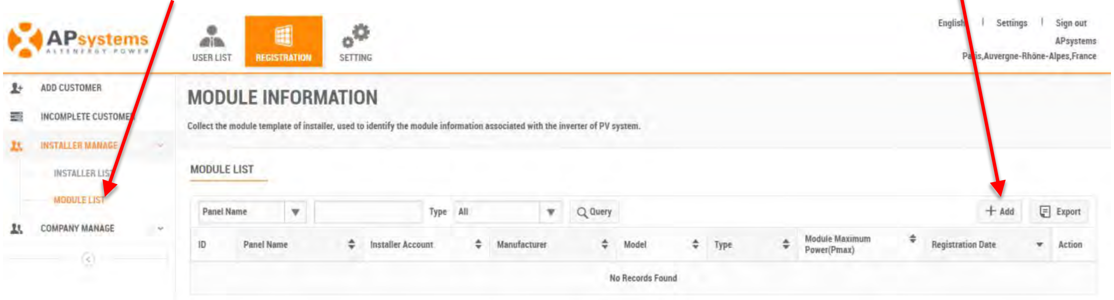
2.3.1 Add a New Module Information

- Select the “MODULE LIST” in the left side bar.

The Module Management page is displayed.

Add Button

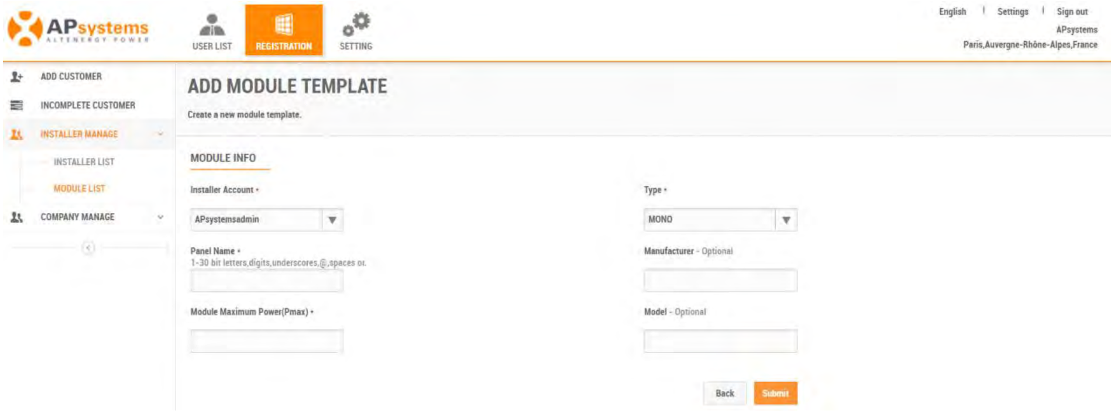
Module List



2. Installer Manage

➢ Select the “Add” module information button.

The module information adding page is displayed.



➢ Enter the correct module information.

➢ Press the “Submit” button.

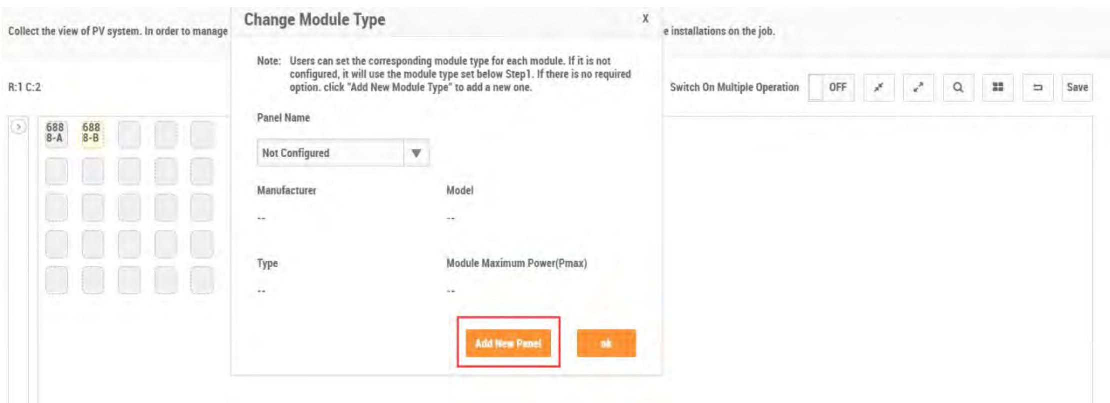
Note

Module information can also be created on the module layout page.

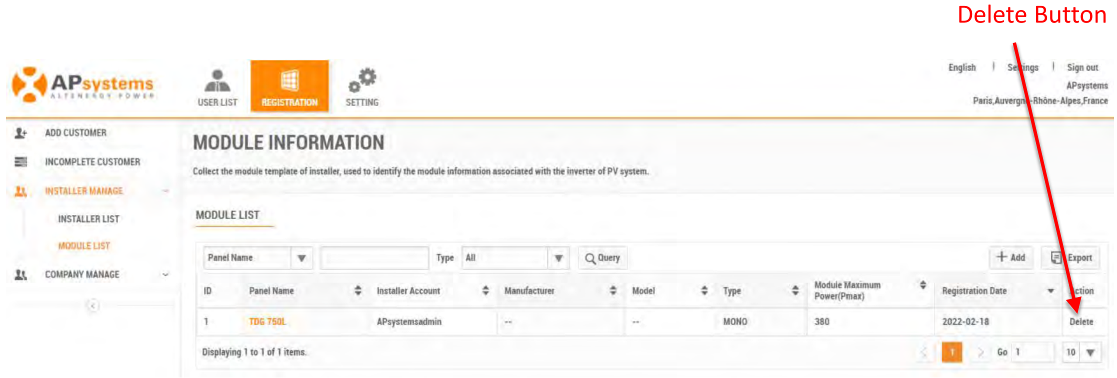
➢ Go to the module layout page.

➢ Right-click on a module and select the “Change Module Type”.

➢ Select “Add New Panel” button.



2. Installer Manage



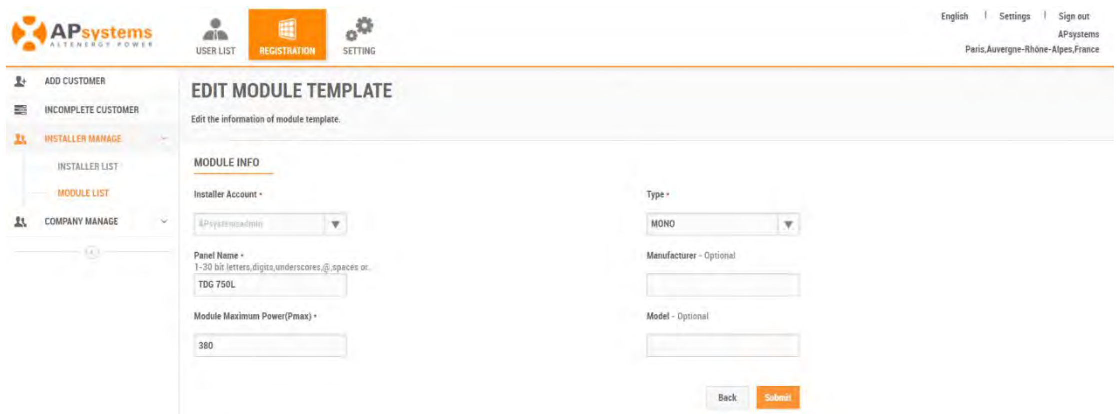
Note

If you want to delete a module information, please make sure that it is not associated with any view module. If there is a view module associated, please go to the view layout page of the corresponding system to disassociate it.

2.3.2 Module Information Management

➢ Select module information you want to edit.

The module information is displayed.



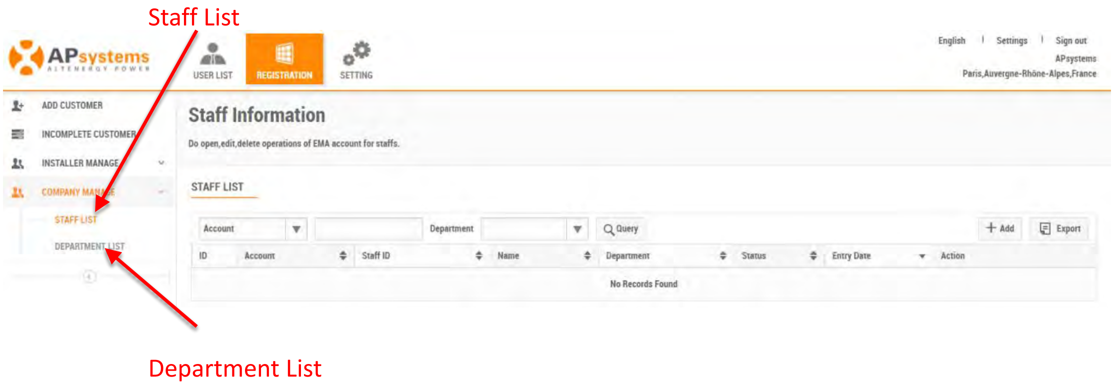
➢ Enter new information.

➢ Select the “Submit” button.

3. Company Manage

The company manage consists of two parts： STAFF LIST and DEPARTMENT LIST.

- ➢ Select the “COMPANY MANAGE” in the left side bar.
- ➢ The sub-menu areas are displayed under “COMPANY MANAGE”.



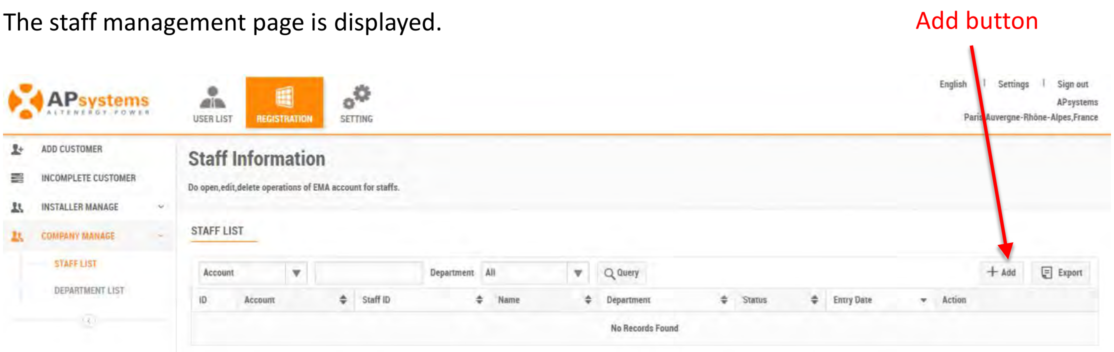
Note

Before adding a staff account, you need to add at least one new department to the department list.

3.1 Add a Staff account

- ➢ Select the “Staff List” in the left side bar.

The staff management page is displayed.



- ➢ Select the “Add” staff account button.

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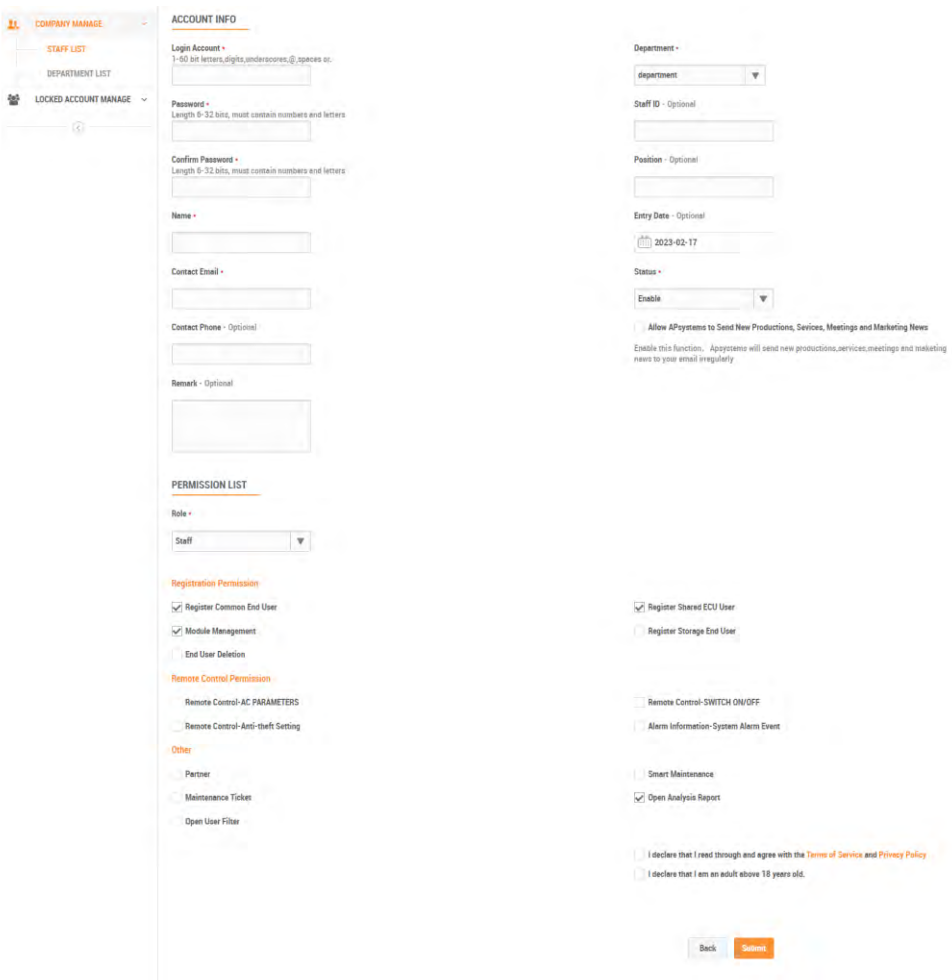
3. Company Manage

The account basic information adding page is displayed.



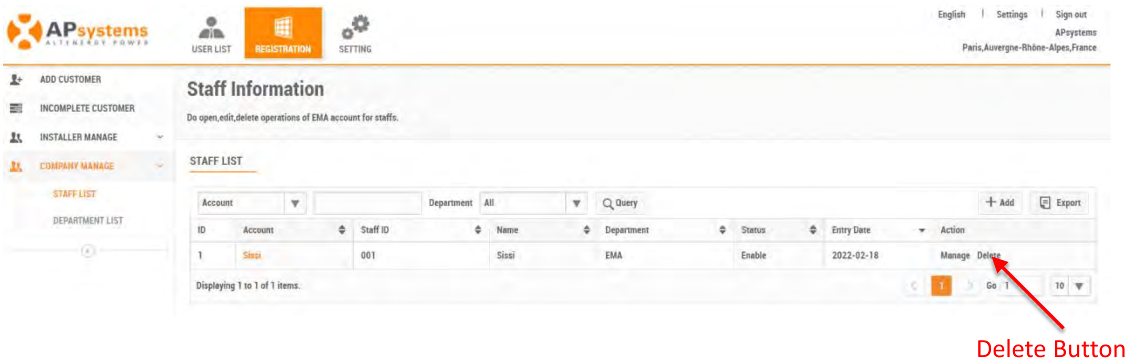
- ➢ Enter information as prompted.
- ➢ Press the “Submit” Button.

Note

The installer can assign different permission information to staff via a list of permissions.

Continued…

3. Company Manage



Note

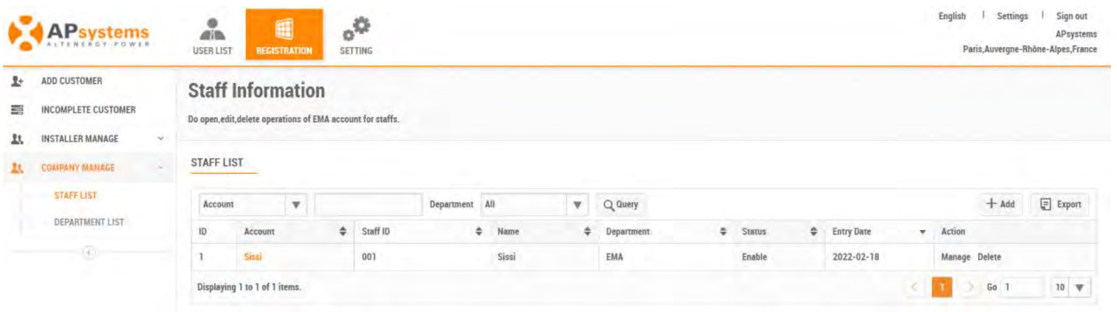
- To delete an account, select the "Delete" button to the right of the record.
- The “Manage Button” is used to assign management scopes to staff accounts, please see the Designated Management Areas section for more information.

3.2 Staff Account Information Management

3.2.1 Edit Basic Account Information

- Select the “REGISTRATION” icon at the top of the page.
- Select the “COMPANY MANAGE” in the left side bar.
- Select the “STAFF LIST” in the left side bar.

A list of your staff registrations is displayed.

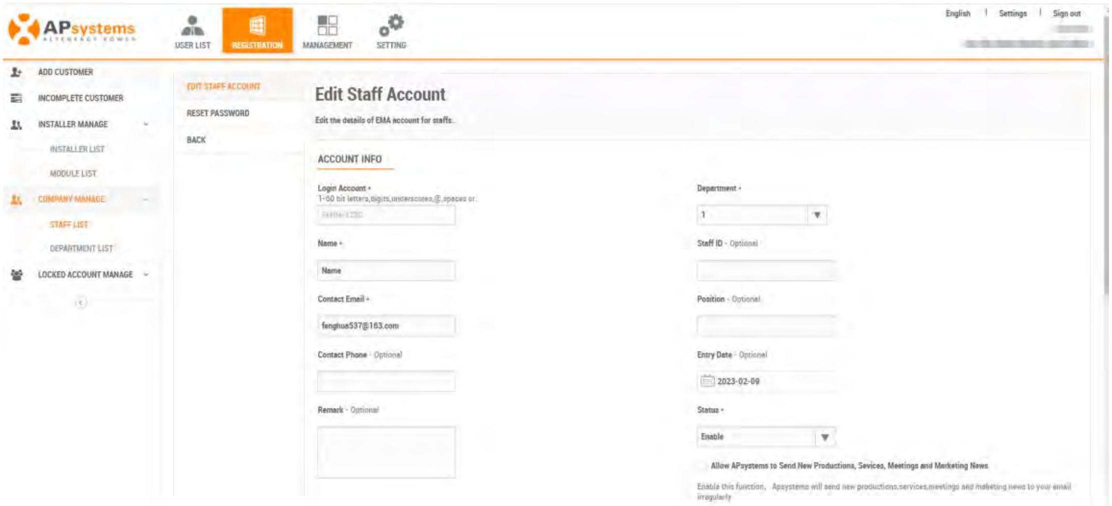


- Select the staff account you want to edit.

Continued…

3. Company Manage

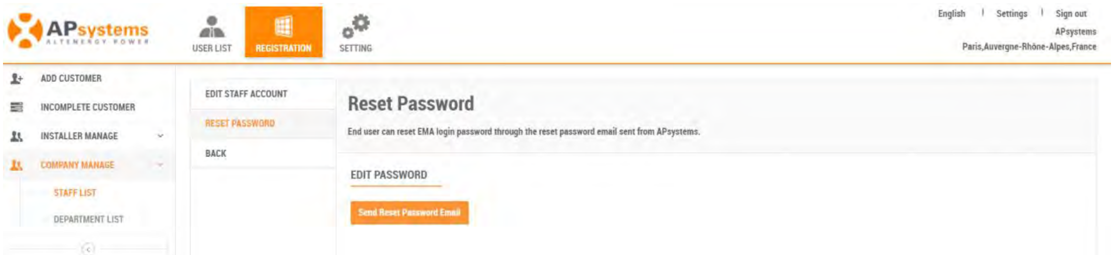
The staff account information edit page is displayed.



➢ Enter new information.
➢ Press the “Submit” button.

3.2.2 Reset Password

➢ Select the “RESET PASSWORD” button
➢ Press the “Send Reset Password Email” button



Note

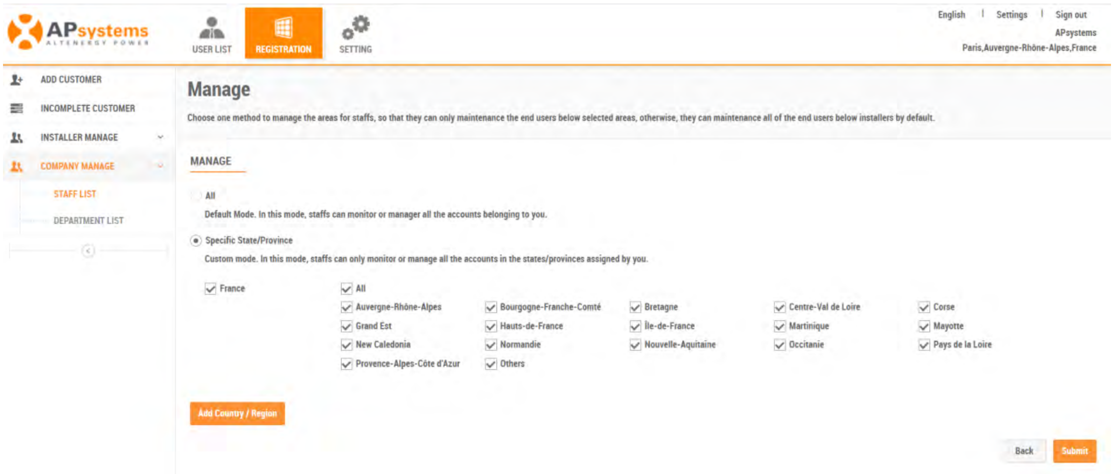
The change password link in the email is valid for 48 hours.

3.2.3 Designated Management Areas

➢ Select the staff account and click on the "Manage" button on the right side of the record.

3. Company Manage

The management areas page is displayed.



➢ Select management areas.
➢ Press the “Submit” button.

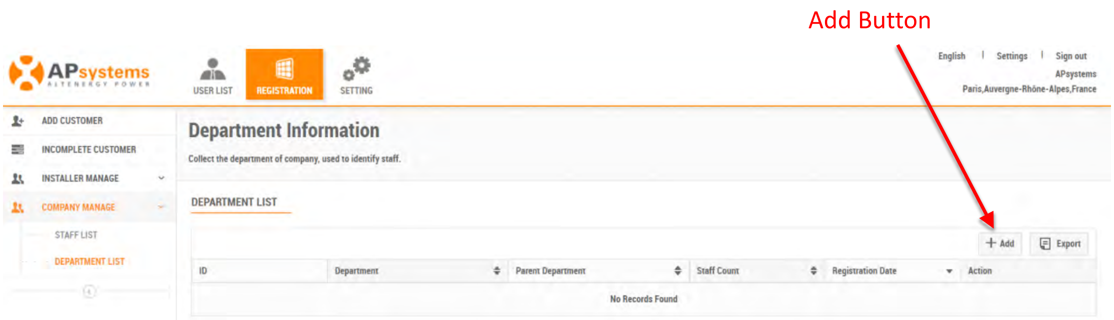
Note

- Select 'All': the default mode in which employees can monitor or manage all accounts under your name.
- Select Specify province: the custom mode, in which employees can only monitor or manage all accounts under the province you have assigned to them.

3.3 Add a New Department

➢ Select the “REGISTRATION” icon at the top of the page.
➢ Select the “COMPANY MANAGE” in the left side bar.
➢ Select the “DEPARTMENT LIST” in the left side bar.

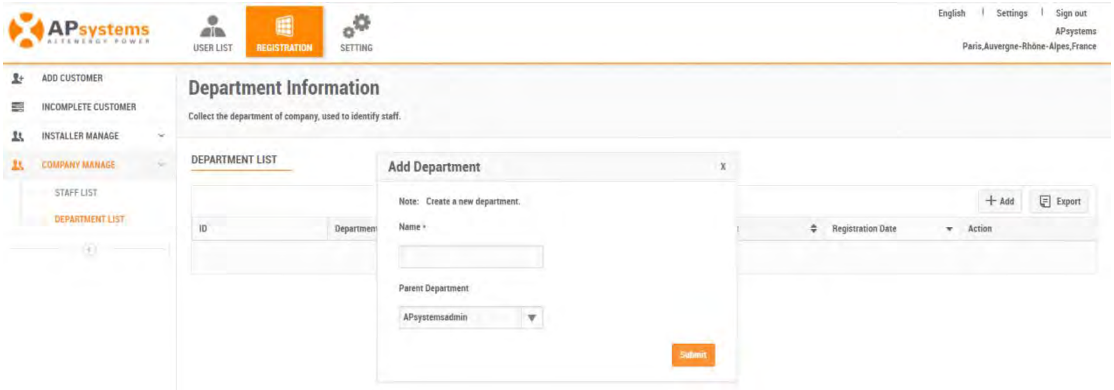
The department management page is displayed.



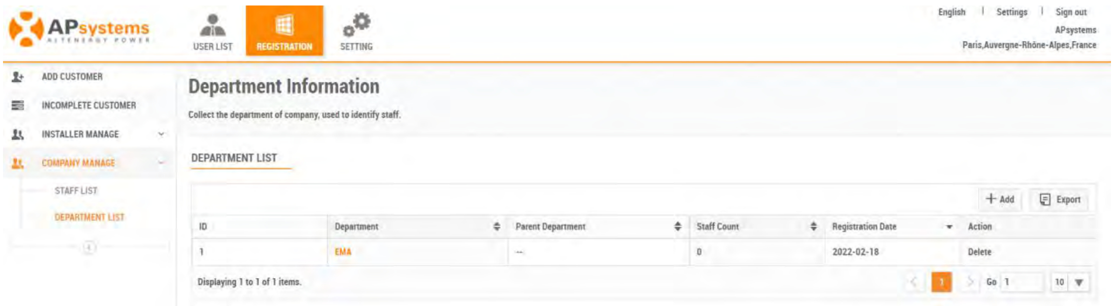
3. Company Manage

➢ Select the “Add” department button.

The department information adding page is displayed.



➢ Enter information.
➢ Press the “Submit” Button.



Note

- You can select the parent department of the department, if there is no parent department, the default is the installer’s company of the logged in user, the parent department in the list shows "--".
- To delete a department, select the “Delete” button to the right of the department record. If there are installer employees and subordinate departments under the department, the department cannot be deleted.

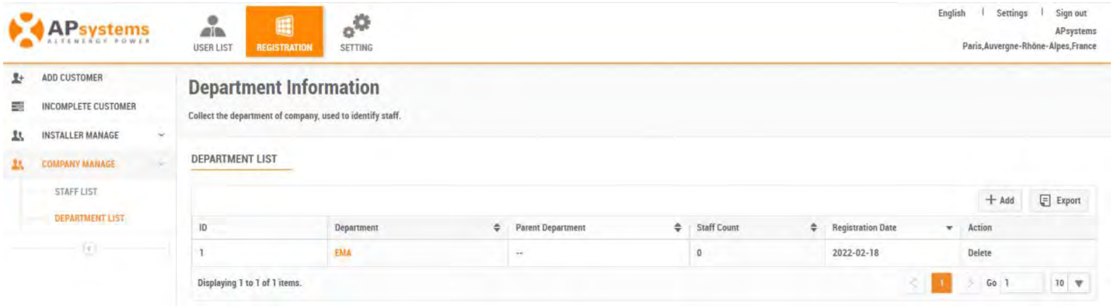
3.4 Department Management

3.4.1 Department Information

3. Company Manage

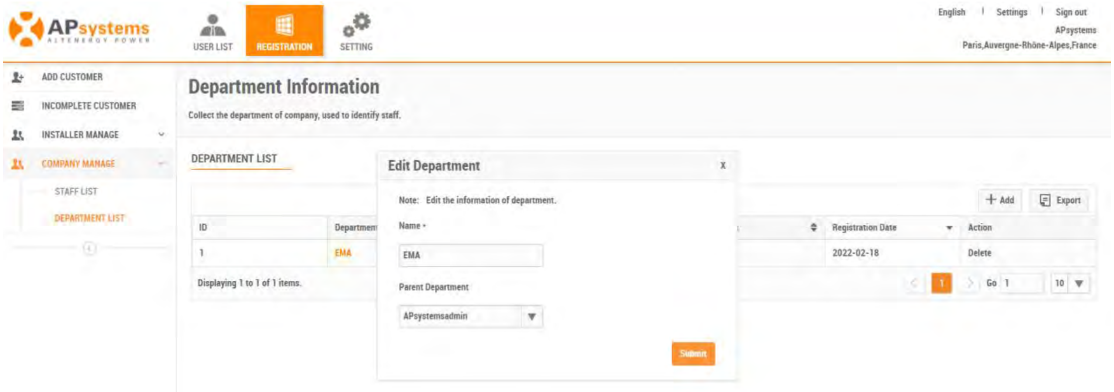
- Select the “REGISTRATION” icon at the top of the page.
- Select the “COMPANY MANAGE” in the left side bar.
- Select the “DEPARTMENT LIST” in the left side bar.

A list of department registrations is displayed.



- Select the department you want to edit.

The department information editing page is displayed.



- Enter new information.
- Press the “Submit” button.