

Password Reset

Fast Class File

SmartOffice®



The reset password feature allows SmartOffice Administrators to reset passwords for any user in SmartOffice.

SmartOffice users can reset their User ID Passwords using the link at the bottom of the login box on the SmartOffice Login Screen.

A screenshot of the SmartOffice login screen. It features a form with fields for 'Office Name' (containing 'Wealthbuilders'), 'User Name' (containing 'Daniel'), and 'Password'. There is a 'Remember Me' checkbox and a 'Login' button. At the bottom of the form, there is a link that says 'Click here if you forgot your password.' which is highlighted with a red rectangular box. A mouse cursor is pointing at this link.

Figure 1: The Forgotten Password link.

However, if a current address has not been added to a user profile or if a user has not entered a security question with an answer, he or she will need to contact the SmartOffice administrator to have the password reset.

Also, if a user attempts to login to SmartOffice three consecutive times with the wrong password, he or she will be temporarily locked out of SmartOffice for 10 minutes. In the event that a user gets locked out, the SmartOffice administrator can reset the password.

Requirements

To reset passwords for SmartOffice users, you will need:

- The **Users/Licenses Administrator** role selected in the **User Role** section of the **User Roles/Licenses** tab for your User ID.

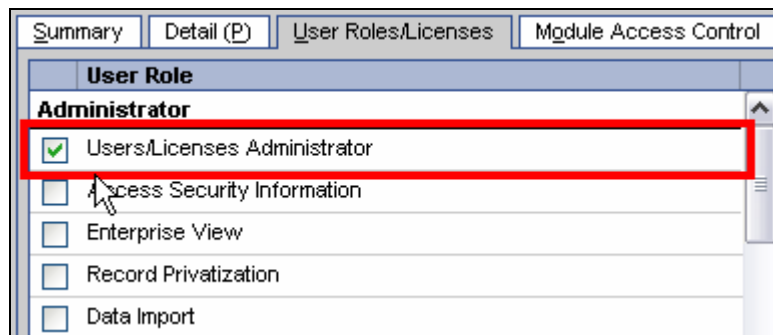


Figure 2: The User Roles/Licenses tab.



- Ensure that the user's correct e-mail address is entered on the Detail tab of the User Administration screen.

User's General Information

User Name **Daniel**

Full Name **Daniel Odell**

Contact Record for this User **Daniel Odell**

E-mail Address **daniel_odell@wealthbuilders.com**

Responsible for Print Queue ☐ (Click here if this user is responsible for printing jobs in the SmartOffice Printer Queue)

Figure 3: The User's General Information section.

Password Reset

- Select **Office Setup** in the Main Menu.
- Select **Office Settings** in the **Office Setup** menu.

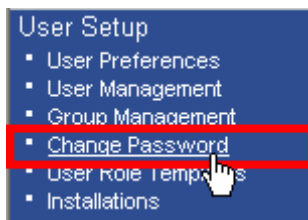


Figure 4: The User Setup Menu.

- In the **Office Administration** screen, select the **Users List** tab.
- On the **Summary** tab of the **User Summary** screen, select the user that needs a password reset.
- Click the **Reset Password** button in the **User Summary** toolbar.



Figure 5: The Reset Password button in the User Summary toolbar.

SmartOffice will display the new temporary password that will be e-mailed to the user and the e-mail address that the password will be sent to.



Figure 6: Temporary password notification

After resetting the password, the **Status** column will indicate that the user has a **Temporary Password**.

Summary		Detail (P)	User Roles/Licenses	Module
	User Full Name	Status		
<input type="checkbox"/>	Admin	Enabled		
<input type="checkbox"/>	Richard Smith	Temporary Password		
<input type="checkbox"/>	William Richards	Enabled		
<input type="checkbox"/>	Carl M. Mathews	Enabled		
<input checked="" type="checkbox"/>	Daniel Odell	Temporary Password		
<input type="checkbox"/>	Elaine Warnings	Enabled		

Figure 7: The Summary tab of the User Summary screen (Temporary Password Status)

When the user logs in with the temporary password, he or she will be prompted to change the password and add enter a security question. Once the user has logged in and changed the password, the status on the **Summary** tab of the **User Summary** screen will indicate that the User ID is **Enabled**.