

## **RISMedia's ACE Administrator Guide**

Some ACE member accounts include administrative abilities to do things like manage members within their organization and create usage reports. Administrators will notice the word "Admin" in their ACE menu. Before proceeding, it is good to understand that ACE has three levels of users: Company, Office, and Individual.

### **About ACE User Levels:**

**Company Level** - At the top there is one company level account. Typically the company owner, officer, or manager working on the owner's behalf might hold this username. With the company-level username, the user can do things like manage all users and run usage reports to get feedback on how ACE is being used throughout the company. This account can also be used to connect to social media accounts that represent the company.

**Office Level** - Under the company there can be one or many offices. Each office has its own unique username. Typically an office manager or administrator holds this username. When logged in the user can do things like manage individuals (typically real estate agents) who belong to that office, as well as get usage reports for the office. This account can also be used to connect to social media accounts that represent the office.

Depending on your business' rules, the office account might be in the name of the office, like "East Norwalk Office," or in the name of an individual, like "Jennifer Smith, Manager."

Depending on your business' rules, offices may or may not have the rights to modify portions of the office ACE account, like change the name or address, or these fields might be locked (for example, the office cannot change the company logo).

**Individual Level** - These are typically individual members of the company and typically are in one of the offices (for example, real estate agent "Jennifer Smith" who works in the "East Norwalk" office of company "Jones Realty"). Individuals will not see the "Admin" option in their ACE menu.

Depending on your business' rules, offices may or may not have the rights to modify portions of the office ACE account, like change the name or address, or these fields might be locked (for example, the individual cannot change the company logo).

## **Using ACE Admin:**

Click Admin > ACE User Admin to access frequently used administrative tools, including:

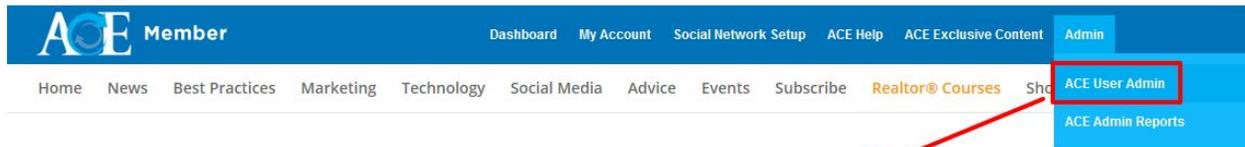
**Add New User** - New member of your organization? Use this to create a new ACE account for them.

**Remove User** - Has an individual left your organization or no longer needs an ACE account? Use this to cancel their ACE account.

**Edit User** - Does an existing ACE member need help adjusting their profile, like changing their profile picture or contact information? As an administrator, you can do this for them.

**Resend Welcome** - Did a member of your organization lose or not receive their welcome email (which contains their username and option to reset password)? Use this to resend or generate copy and paste and send to them directly.

**Usage Reports** - Want some insight on how your organization is utilizing ACE? Usage reports can provide a roster of all users, and/or a report on those who have successfully logged in, have never logged in, have not completed setting up their profile, and/or have set their account for auto-posting.



## **ACE User Admin Info**

What would you like to do?

<a href="#">Add New User</a>	Use Add a New User to create a new ACE account. For example, if a new person has joined your firm or if you want to create a new ACE account for an office. Select an office here: <input type="text"/>
<a href="#">Remove User</a>	Need to cancel an ACE account? For example, a person has left your firm or you have closed an office. Enter an email address here and click Remove User: <input type="text"/>
<a href="#">Edit User</a>	Use this to edit user information. For example, upload a profile picture for an agent or edit an agents contact information. Enter an email address and click Edit User: <input type="text"/>
<a href="#">Resend Welcome</a>	Did a user lose their initial Welcome to ACE email? Use this to start the process of re-sending a Welcome email. Enter an email address and click Resend Welcome: <input type="text"/>
<a href="#">Usage Reports</a>	Get vital stats about your user. See who is enrolled in ACE, who is using ACE to auto-post and more. Click the Usage Reports button.

## How to Add a New User

Depending on your organization's business rules, a new employee might be enrolled in ACE by someone with the company-level login or by someone at the local office where the employee will be working.

**Company Level:** When logged in with the company username, the user can add a new user to the company itself, or to offices within the company (for example, a new employee, "Jennifer Agent," will be working out of the company's "East Norwalk" office). The company admin would select "East Norwalk" from the office list and click "Add New User" to begin the process of creating a new ACE account in the East Norwalk office for new hire Jennifer Agent.

**Office-level** administrators will have their own login, and, via the ACE Admin area, can click Add New User to create a new ACE account within their office only. For example, the admin for the East Norwalk office can login to create a new ACE account for new hire Jennifer Agent.

- 1) If applicable, select the office that you want to add the new user to and click "Add New User."

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## ACE User Admin Info

### What would you like to do?

<b>Add New User</b>	Use Add a New User to create a new ACE account. For example, if a new person has joined your firm or if you want to create a new ACE account for an office. Select an office here: <input type="text"/>
<b>Remove User</b>	Need to cancel an ACE account? For example, a person has left address here and click Remove User: <input type="text"/>
<b>Edit User</b>	Use this to edit user information. For example, upload a profile picture for an agent or edit an agents contact information. Enter an email address and click Edit User: <input type="text"/>
<b>Resend Welcome</b>	Did a user lose their initial Welcome to ACE email? Use this to start the process of re-sending a Welcome email. Enter an email address and click Resend Welcome: <input type="text"/>
<b>Usage Reports</b>	Get vital stats about your user. See who is enrolled in ACE, who is using ACE to auto-post and more. Click the Usage Reports button.

2) Add the new user's information. Email address, first and last name are required. Click "Add Member."

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Add New User for Office Account [REDACTED]  
If you don't provide a password one will be generated for the account.  
Profile information will be copied from the Office Account

Email:	<input type="text" value="Email"/>	Required - Enter agent's email address.
Password:	<input type="text" value="Password"/>	Optional - system will create if no password added.
First Name:	<input type="text" value="First Name"/>	Required - Enter agent's first name.
Last Name:	<input type="text" value="Last Name"/>	Required - Enter agent's last name.
Office Name:	<input type="text" value="Office Name"/>	Optional - enter office name.
Title:	<input type="text" value="Title"/>	Optional - enter agent's office name.
Company:	<input type="text" value="Peter Realty"/>	This will default to parent company or can edit.

Add Member

3) Complete the profile or send the agent a "welcome email" and let them login and complete the profile themselves.

You will notice that some items, like company logo and even address, have been pre-populated.

As the admin, you can elect to personalize the account on behalf of the new user. For example, you can upload the agent's profile picture, add their mobile number, etc.

Alternatively, you can send the welcome email to the agent and let the agent set up their account themselves.

The screenshot shows the RISMedia user profile management interface. The page is titled "RISMedia Member" and includes a navigation menu with options like "Dashboard", "My Account", "Social Network Setup", "ACE Help", "ACE Exclusive Content", and "Admin". The main content area is divided into sections for "Headshot", "Primary Logo", and "Secondary Logo". Each section has a "Browse" button and an "Update" button. A "Welcome Email" link is also present. A "Profile has been updated" message is displayed at the bottom of the form. Below the form is a table of fields and their values.

**OPTION:** Admin can complete the new user profile below on behalf of the agent. For example upload the user's picture, enter contact info, etc.

Or Admin can click the "Welcome Email" link to send the new user a welcome email and let the user complete the profile themselves.

**NOTE:** Admin can help a user with their profile anytime by using the "Edit User" button in the User Admin menu.

Company logo will be inherited from the parent account. For some accounts the admin may have rights to change.

**OPTIONAL:** Admin can help agent with uploading headshot or editing contact info.

Admin should click Update Profile to save any changes.

Field Name	Field Value
First Name:	Jennifer
Last Name:	Agent
Office Name:	Office Name
Title:	Sales Associate
Company:	Fidel Realty
Address1:	68 East Ave
Address2:	2nd line of your address
City:	Norwalk
State:	Connecticut
Zip Code:	06851
Office Phone:	(203) 809-1234
Mobile Phone:	Secondary Phone
Email Address:	jensagen@rismedia.com
Company Link Anchor:	Our Website
Company url:	http://www.rismedia.com
Sales Link Anchor:	Home for sale link name
Sales url:	Home for sale link
Misc Field:	Misc Field
EHO Icon:	<input type="checkbox"/>
Realtor Icon:	<input type="checkbox"/>

## How to Remove a User

Has an individual left your organization or no longer need an ACE account? In the "Remove User" area, begin typing the user's email address in the search box. The search box will look for all users in your organization. When you have found the the user, click "Remove User."

**Step 1:** Start typing user email address...

**Step 2:** When address is found, click the "Remove User" button...

What would you like to do?

The screenshot shows a menu titled "What would you like to do?" with four options: "Add New User", "Remove User", "Edit User", and "Did a user lose their initial Welcome to ACE email?". The "Remove User" button is highlighted with a red box. A red arrow points to the "Remove User" button with the text "Start typing the user's email address to find their account...". Below the "Remove User" button, a search dropdown is open, showing a list of email addresses: "peter+officelevel@rism", "peter+office1@rismedi", "peter+office2@rismedi", "peter+agent1@rismedi", "peter+agent2@rismedi", and "peter+agent3@rismedi".

**Step 3:** Select status as "Inactive," select a reason, and (optionally) leave a comment. Click the "Cancel" button to process the closing.

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The screenshot shows the "Cancel/Suspend service for user Jennifer Agent ID: 104453" form. The form has the following fields and annotations:

- Set Status to:** A dropdown menu with "Inactive" selected. A red arrow points to the dropdown with the text "Set Status to Inactive."
- Reason :** A dropdown menu with "Other" selected. A red arrow points to the dropdown with the text "Select a Reason. (Option to add comment)".
- Comment :** A text input field with "Cancel Reason" entered. A red arrow points to the input field.
- Cancel:** A blue button with "Cancel" text. A red arrow points to the button with the text "Click 'Cancel' to close the account."

## How to Edit a User

Use this to edit a user's information. For example, do you have an agent that needs help uploading their profile picture, or editing their contact information? Use this area to access their account, and then you can make changes for them.

*Note: You will NOT be able to set up social media connections for users; this will only let admins adjust the user's profile. To help a user set up their social media connections, you would need to login to ACE directly as the user and then also need their social media usernames and passwords, or, simply refer the user to this [video](#).*

**Step 1:** In the "Edit User" area, begin typing the user's email address to find their account.

**Step 2:** Once the email is found, click the "Edit User" button.

### What would you like to do?

<input type="button" value="Add New User"/>	Use Add a New User to create a new ACE account. For example, if a new person has joined your firm or if you want to create a new ACE account for an office. Select an office here: <input type="text" value="Chicopee Test Office-Chicopee-Residential Brokerage"/>
<input type="button" value="Remove User"/>	Need to cancel an ACE account? For example, a person has left your firm or you have closed an office. Enter an email address here and click Remove User: <input type="text"/>
<input type="button" value="Edit User"/>	Use this to edit user information. For example, upload a profile picture for an agent or edit an agents contact information. Enter an email address and click Edit User: <input type="text" value="jen"/> <input type="text" value="jenagent@rismedia.com"/> <input type="text" value="jenagen+2t@rismedia.c..."/>
<input type="button" value="Resend Welcome"/>	Did a user lose their initial Welcome to ACE email? Use this to start the process of re-sending a Welcome email. Enter an email address and click Resend Welcome: <input type="text"/>

Start typing the user's email address to find their account.

**Step 3:** Make desired changes to profile. Click "Update Profile" at the bottom to save the changes.

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You can view a sample of this users branded page [here](#).

Headshot:



Browse... No file selected. Upload File

Primary Logo:



Browse... No file selected. Update Primary Logo

Secondary Logo:

There is no secondary logo for this user

Browse... No file selected. Update Secondary Logo

Field Name	Field Value
First Name:	Jennifer <input type="text"/>
Last Name:	Agent <input type="text"/>
Office Name:	Office Name <input type="text"/>
Title:	Sales Associate <input type="text"/>
Company:	<input type="text"/>
Address 1:	123 Main St <input type="text"/>
Address 2:	2nd Floor <input type="text"/>
City:	Anytown <input type="text"/>
State:	<input type="text"/>
Zip Code:	5555 <input type="text"/>
Secondary Phone:	(555) 555-5555 <input type="text"/>
Primary Phone:	(555) 555-5555 <input type="text"/>
Email Address:	jennifer@rismedia.com <input type="text"/>
Company Link Anchor:	<input type="text"/>
Company url:	<input type="text"/>
Sales Link Anchor:	<input type="text"/>
Sales url:	<input type="text"/>
Misc Field:	Misc Field <input type="text"/>
EHO Icon:	<input checked="" type="checkbox"/>
Realtor Icon:	<input checked="" type="checkbox"/>

Update Profile

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## How to Resend or Generate a Welcome Email

Did a member of your organization lose their "Welcome" email or need help logging in? You can instruct them to use the "Forgot password" option near the ACE login form, or can follow these steps to resend the original "Welcome" email from the ACE system. You can also use these steps to generate a copy of the email that you can copy and paste and send to them from you personally.

**Step 1:** In the "Resend Welcome" area, begin typing the user's email address to find their account.

**Step 2:** Once the email is found, click the "Resend Welcome" button to get to the next screen.

Did a user lose their initial Welcome to ACE email? Use this to start the process of re-sending a Welcome email. Enter an email address and click Resend Welcome:   
  
Get vital stats about your user. See who is enrolled in ACE, who is using ACE to auto-post and more. Click the Usage Reports button.

**Start typing user's email address to find their account.**

**Step 3a Option:** Check box near "Run in Preview Mode" to generate a preview of the email first. This way you can see what the system will be sending. If you like, you can copy and paste it into your own email and send personally to the user.

**Step 3b:** With the "Run in Preview Mode" unchecked, click "Generate Email" to send the welcome email directly to the user from the ACE system.

## Done

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Processing information follows:  
Number of preview emails generated = 1

Run in Preview Mode

Email Preview follows: Preview of email being sent to jenagent@rismedia.com  
Subject is: **Peter Realty** Welcomes You to RISMedia's ACE - Automated Content Engagement

Preview follows

Dear Jennifer,

On behalf of Peter Realty welcome to RISMedia's ACE - your Automated Content Engagement platform!

You're just a few steps away from maximizing your social media presence with engaging content, automatically posted and branded to you.

**With RISMedia's ACE, you receive:**

**Social media posts delivered automatically** to your selected social networks every day (frequency options available), sharing consumer-facing homeownership, real estate and lifestyle articles, infographics, videos and more, all with your branding, including your contact information, headshot, logo and website URL.

**Your ACE Membership also includes:**

**Option: Copy and paste the below to your own email and send to user (instead of sending from "Generate Email".)**

## Usage Reports to Gain Insight

Want some insight on how your organization is utilizing ACE? If you are logged in with the company-level login, then you will have option to see reports for all users in your company. If you are logged in with an office-level login, you will be able to see data from all users in your office.

These are some the reports that are available\*:

- Successful Login - Shows all the users who have successfully logged in
- Never Logged In - Shows all the users who have never logged in
- Roster - Shows a roster of all Active ACE members in your company or office
- Auto-posting - Shows users who have set up auto-posting
- Missing Headshot - Shows members who have not uploaded headshot (gives insight as to how much of set-up the user has completed)
- Accounts with no social connection created - Shows accounts that have not set up auto-posting
- Auto-Posting Detail - Shows specific social media accounts selected for auto-posting

### Step 1: Select a report.

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Select an Admin Report below:

Select a report:	Successful Login - Show all the users who have successfully logged in	▼
Select an Account:	Successful Login - Show all the users who have successfully logged in	
Select a format:	Never Logged In - Shows Enterprise or Company level children or grandchildren that have never logged in	
	Roster - Show a roster of all Active ACE members that belong to the company, or Enterprise and most of their profile data.	
Generate Report	Autoposting - Shows users with autopost set up	
	Missing Headshot - Shows members of enterprise where headshot is default or NULL	
	Accounts with no social connection created - Accounts with no social connection created	
	Auto-Posting Detail - Sort by User ID - Shows specific social media accounts selected for posting	

**Step 2:** If you are logged in with a company-level login, you will see the option to run reports to specific offices or for the entire company. Select one.

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Select an Admin Report below:

Select a report: Successful Login - Show all the users who have successfully logged in

Select an Account: 101094 - Peter - Company-Enterprise - Peter Realty

Select a format: CSV

[Generate Report](#)

- 101094 - Peter - Company-Enterprise - Peter Realty
- 101095 - Peter - Office - Peter Realty
- 102938 - Office - Peter Realty
- 102939 - Office - Peter Realty
- 104452 - Residential Brokerage - Residential Brokerage

**Step 3:** Select a format. "CSV" is a great choice if you'd like to see this data in a spreadsheet (e.g., Excel).

**Step 4:** Click "**Generate Report.**" Depending on size, this may take a few seconds.

**Step 5:** A message, "Your report has been generated, click [this link](#) to download." Will appear. Click the link and the download will start. Open the file to review.

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Select an Admin Report below:

- 1 Select a report: Successful Login - Show all the users who have successfully logged in
- 2 Select an Account: 101094 - Peter - Company-Enterprise - Peter Realty
- 3 Select a format: CSV
- 4 [Generate Report](#)
- 5 Your report has been generated, click [this link](#) to down load.