

Account Creator

User Guide



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Overview

The PseudoCode Account Creator extends the standard iMIS account creator by providing duplicate checking and messages to alert the user that the details entered are of an existing account or partially correct login details. If the iPart finds no exact matches for entered username and password and no duplicates for the entered first name, last name, email, company name (if visible) and company id (if visible) it will create a new account, login and redirect as the standard iMIS account creator does.

System Requirements

The PseudoCode Account Creator iPart is compatible with versions of iMIS as far back as 20.2.1 and is compatible with the latest version of iMIS 2017 (20.2.64).

The system requirements for PseudoCode Account Creator are the same as what iMIS requires and can be found here:

http://help.imis.com/imis2017/Implementation/Installing/System_Requirements.htm?Highlight=system%20requirements

Installation

A copy of the installation files are provided once the software has been purchased.

Install steps:

1. Copy dll's to '\Net\bin' and '\AsiPlatform\Asi.Scheduler_iMIS\bin' folders
2. Copy "PseudoAccountCreator" folder to '\Net\iParts\Custom' folder (Note: Create 'Custom' folder if it doesn't exist)
3. Import the content type XML file in RiSE->Maintenance->Content Types, and import into the Custom folder
4. Now you can add the iParts to a content page and apply the license keys

License Key

A license key will be provided once the software has been purchased. The iPart must first be installed and the content type created within iMIS. You can then place the iPart on a RiSE page. At this point, it will ask you to enter the license key. Once it has been applied, you won't need to apply it again.



Licence

Expiry Date

Configuration

☐ Hide for authenticated users

Commit sequence

Account

Type of account to create ☐ Individual only☐ Organization only☒ Individual or organization☐ Assign selected user as administrator for new organizations☐ Include primary organization for individuals☐ Require primary organization for individuals

Organization list query path

☐ Include prefix☒ Include suffix☐ Include designation☐ Include informal name☐ Include title☐ Include phone☐ Include mobile phone

☐ Include DOB

☒ Include email for individuals

☒ Require email for individuals

☐ Include email for organizations

☐ Require email for organizations

☐ Include address

☐ Require address

☐ Multiple lines for street address

Create address purpose

Sign in

☒ Include Sign In link

☒ Include option to create an account

☒ Require username and password

☒ Use email as username

Redirect

Redirect to ☐ Do not redirect

☐ Previous page

☒ Content record or URL

Content or URL to Link to [select](#)

☐ Include ID as a URL parameter

These settings follow the standard iMIS Account Creator iPart and allow you to set various features such as individual, or organization only. Which fields to show such as prefix, suffix, etc.

Bad Password Message: If the user enters a user name of an existing contact, but incorrect password, this message will show. You can use two variables ([FORGOTUSERLINK] and [FORGOTPASSLINK]) that return the links for the forgotten user and forgotten password screens in your message. (Optional)

Example uses of PseudoCode Account Creator

User has entered existing username, but incorrect password.

Already registered? [Sign In](#)

*First name	<input type="text" value="Brian"/>
Middle name	<input type="text"/>
*Last name	<input type="text" value="English"/>
Suffix	<input type="text" value="(None)"/> <input type="button" value="v"/>
*Email	<input type="text" value="BRIAN@PSEUDOCODE.C"/>
*Confirm email	<input type="text" value="BRIAN@PSEUDOCODE.C"/>
Create an account	
Username	<input type="text"/>
*Password	<input type="password"/>
*Confirm password	<input type="password"/>

Your password must be a minimum of 6 characters containing at least one uppercase, lower case and a number

Incorrect password, please try again or reset password. Click [here](#) to recover.

Save

Cancel

Release Notes

