



Superuser Guide for Texas SmartBuy Members

Texas SmartBuy Superusers serve as the security coordinator for your organization's access within the Texas SmartBuy portal.

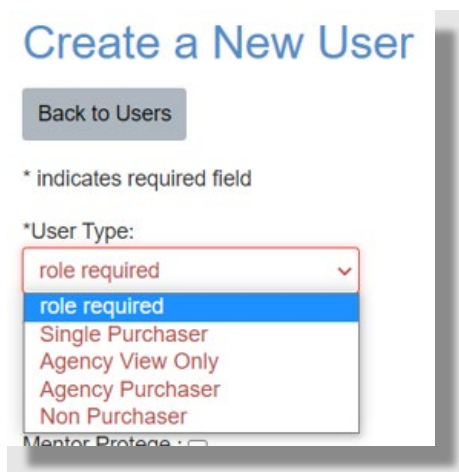
It is the responsibility of the Superusers to manage their entity's user access. Each superuser will receive a monthly report of their entity's active users, last login date, and their system permissions. They should review the monthly report and remove access for users that have either left the entity or no longer require that access.

To be added as a superuser for your entity, the access request must come from an existing superuser or an authorizing manager at your entity, which includes the new superuser's name, title, entity email address and phone number.

Superuser access needs to be requested from the Texas SmartBuy Help Desk txsmartbuy@cpa.texas.gov or call 512-463-3034 option 1.

- **Superuser (Must be set up, edited, and deactivated by Texas SmartBuy Help Desk)**
 - Can have a Purchaser or Non Purchaser role
 - Can add and deactivate addresses to the entity address book
 - Can edit user roles and application access
 - Can add new entity users other than Superuser
 - Can deactivate entity users
 - Cannot change user email address (contact Texas SmartBuy Help Desk)

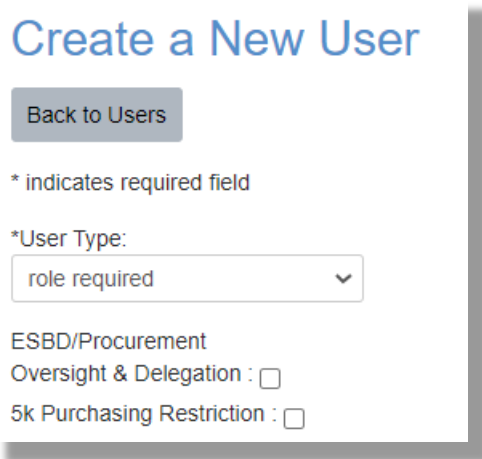
Statewide Procurement Division (SPD) Texas SmartBuy User Role Descriptions



- **Single Purchaser**
 - Can create POs

- Can view and edit their own POs
- Can cancel their own POs
- **Agency View Only**
 - Can view any POs created by their entity. This access is good for users like accounts payable or others that need to view POs but aren't in a purchaser role.
 - These users don't typically have access to other SPD applications
- **Agency Purchaser**
 - Can create POs
 - Can view and edit any PO for their entity
 - Can cancel any PO for their entity
- **Non Purchaser**
 - Can create shopping carts
 - Can save shopping carts
 - Can have multiple saved carts
 - Can share carts with purchasers
 - Cannot checkout to create POs

Statewide Procurement Division (SPD) Applications Descriptions



Create a New User

[Back to Users](#)

* indicates required field

*User Type:

ESBD/Procurement
 Oversight & Delegation :

5k Purchasing Restriction :

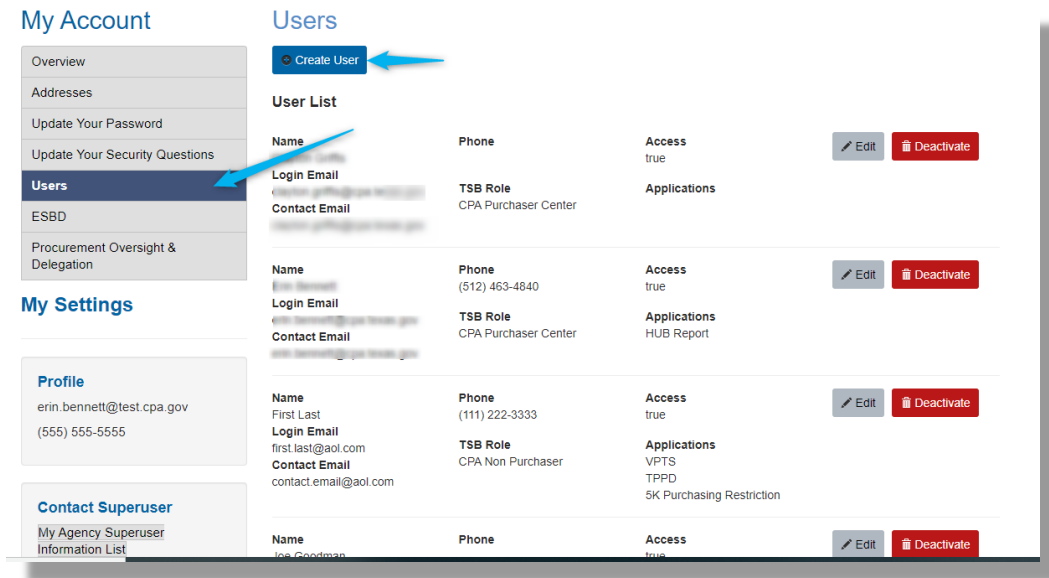
- **ESBD Electronic State Business Daily/Procurement Oversight & Delegation** - This access allows users to post solicitations and/or awards on the ESBD advertising platform and submit solicitations directly to SPD for Procurement Oversight and Delegation (POD) or Contract Advisory Team (CAT) review before posting on the ESBD.
- **5K Purchasing Restriction** - When this permission is selected the purchaser is only allowed to create POs totaling \$5,000 or less.

For more information about Procurement training, visit the [SPD Training and Policy Division website](#).

User Management

Creating New Users

- Choose Users from My Account
- Create User



1. Select the appropriate user access role in the User Type field.
2. Check any application access the user needs.
3. Enter the user's contact information
 - First Name
 - Last Name
 - Login Email (used to login to the portal)
 - Contact Email (email where system notifications will be sent including POs)
 - Phone
4. Select Add User

My Account

- Overview
- Addresses
- Update Your Password
- Update Your Security Questions
- Users
- ESBD
- Procurement Oversight & Delegation

My Settings

Profile
erin.bennett@test.cpa.gov
(555) 555-5555

Contact Superuser
My Agency Superuser Information List

Create a New User

[Back to Users](#)

* indicates required field

*User Type: role required

ESBD/Procurement Oversight & Delegation :

5k Purchasing Restriction :

*First Name

*Last Name

*Login Email

*Contact Email

Phone

[+ Add User](#)

Editing Users

1. Choose Users from My Account Navigation
2. Select the Edit button associated with the desired user.

My Account

- Overview
- Addresses
- Update Your Password
- Update Your Security Questions
- Users**
- ESBD
- Procurement Oversight & Delegation

Users

[Create User](#)

User List

Name	Phone	Access
erin.bennett@test.cpa.gov		true
erin.bennett@test.cpa.gov	(512) 463-4840	true

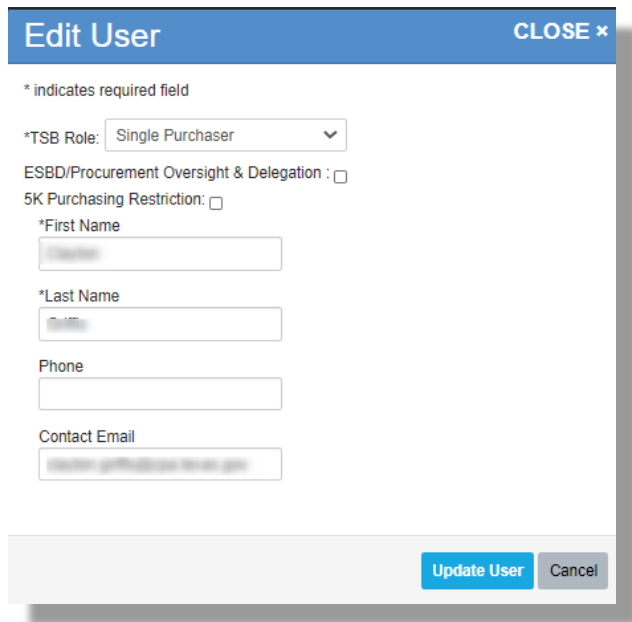
Applications

CPA Purchaser Center

HUB Report

[Edit](#) [Deactivate](#)

3. The User's information will be displayed
4. Make required changes
5. Select Update User
6. Cancel will not save changes



Edit User CLOSE ✕

* indicates required field

*TSB Role:

ESBBD/Procurement Oversight & Delegation :

5K Purchasing Restriction:

*First Name

*Last Name

Phone

Contact Email

Note: You are not allowed to change the login email. If the login email address needs to be changed or corrected, you will need to contact the [Texas SmartBuy Help Desk](#).

Deactivating/Reactivating Users

1. Choose Users from My Account Navigation
2. Select the Deactivate button on the desired user
3. You will be prompted to enter the reason the user's access is being removed
4. Select Yes to remove the user's access

My Account

- Overview
- Addresses
- Update Your Password
- Update Your Security Questions
- Users**
- ESBD
- Procurement Oversight & Delegation

My Settings

Users

Create User

User List

Name	Phone	Access	Applications
[Redacted]	[Redacted]	true	[Redacted]
[Redacted]	[Redacted]	true	[Redacted]

Deactivate User CLOSE x

Are you sure you want to deactivate this user?

Please enter reason for removing user:

Yes No

5. You will receive this confirmation message. Press OK to close the message box.

852252-sb2.secure.netsuite.com says

User successfully deactivated

OK

6. To reactivate a user's access select Reactivate

Name	Phone	Access	Applications
Address Test Login Email atest@aol.com Contact Email areal@me.com	(123) 456-7890 TSB Role	false	[Redacted]

7. Select the appropriate role and application permissions
8. Select Yes to complete the change



Reactivate User CLOSE x

*TSB Role:

ESBD/Procurement Oversight & Delegation :

5K Purchaser Restriction :

Are you sure you want to reactivate this user?

Address Book

Texas SmartBuy provides superusers with address book management for your entity. Your entity address book is a group-level address book with all your shipping and billing addresses combined for the entire entity. The list of addresses is shared by all purchasers from your respective entity.

Purchasers need to contact their superuser to add an address in the address book. A list of superuser contacts is linked from the My Account page.

My Account

- Overview
- Addresses
- Update Your Password
- Update Your Security Questions
- Users
- ESBD
- Procurement Oversight & Delegation

My Settings

Profile
erin.bennett@test.cpa.gov
(555) 555-5555

Contact Superuser
My Agency Superuser
Information List



Welcome to the Portal

Announcements Section

Home

Main Announcement Page

Google Chrome is the preferred browser for Texas SmartBuy.

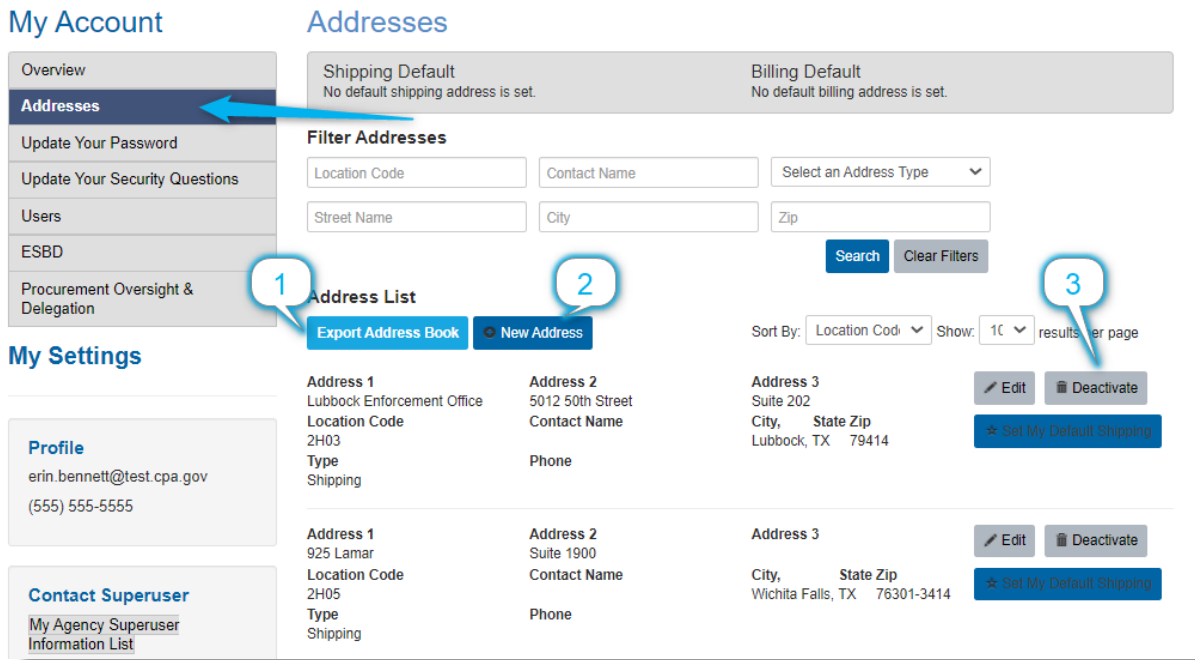
Users may experience page loading issues in other browsers.

If refreshing pages does not work, please contact Texas SmartBuy Support at:

spd.outreach@cpa.texas.gov

Addresses Page

As the Texas SmartBuy superuser you have additional functions on the Addresses page. Superusers are authorized to add and deactivate the address listings on behalf of the organization. Access the entity address book by selecting Addresses from the My Account navigation.



1. Export Addresses

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

NOTE: If you need to deactivate or add several addresses, you can make the edits in the file and send a request to import to the Texas SmartBuy Helpdesk. Please add a column in front of all the other columns and indicate per row the action need: Add or Deactivate.

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

2. 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 or onetime addresses, but they are not added to the address book). Certain fields are required as indicated by an asterisk.

Required Fields:

- Address Type (Shipping, Billing, or Both)
- Address 1



- City
- State
- Zip

My Account

- Overview
- Addresses**
- Update Your Password
- Update Your Security Questions
- Users
- ESBD
- Procurement Oversight & Delegation

My Settings

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(555) 555-5555

Contact Superuser
My Agency Superuser
Information List

Add New Address

[Back to Address Book](#)

* indicates required field

*Address Type: Shipping Billing

Location Code Contact Name Phone

*Address 1 Address 2 Address 3

*City *State *Zip

[Save Address](#) [✖ Cancel](#)

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

3. Deactivate Addresses

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

Filter Addresses

Location Code Contact Name Select an Address Type

Street Name City Zip

Address List

Sort By: Show: results per page

<p>Address 1 Lubbock Enforcement Office Location Code 2H03 Type Shipping</p>	<p>Address 2 5012 50th Street Contact Name Phone</p>	<p>Address 3 Suite 202 City, State Zip Lubbock, TX 79414</p>	<p><input type="button" value="Edit"/> <input type="button" value="Deactivate"/></p> <p><input type="button" value="Set My Default Shipping"/></p>
<p>Address 1 925 Lamar Location Code 2H05 Type Shipping</p>	<p>Address 2 Suite 1900 Contact Name Phone</p>	<p>Address 3 City, State Zip Wichita Falls, TX 76301-3414</p>	<p><input type="button" value="Edit"/> <input type="button" value="Deactivate"/></p> <p><input type="button" value="Set My Default Shipping"/></p>

Deactivate Shared Address

Are you sure you want to deactivate this shared address?

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

Deactivate Shared Address

Your shared address has been deactivated.

The address will disappear from the entity address list. It will not be permanently deleted from Texas SmartBuy 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. Important: The default addresses MUST be present in the gray box for purchase order entry to successfully complete. If you set a default address, it ONLY applies to your individual user account. This applies to purchasers and superusers. When a new address is created the Type field will determine if it can be used as a default billing, shipping, or both.

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.

The screenshot shows a user interface for managing addresses. At the top, there are two default address sections: 'Shipping Default 2H06' and 'Billing Default 2H05'. Below these is a 'Filter Addresses' section with input fields for Location Code, Contact Name, Address Type, Street Name, City, and Zip, along with 'Search' and 'Clear Filters' buttons. The main section is the 'Address List', which includes buttons for 'Export Address Book' and 'New Address'. It displays a table of addresses with columns for Address 1, Address 2, and Address 3, including details like Location Code, Contact Name, Phone, City, State, and Zip. For each address, there are 'Edit' and 'Deactivate' buttons. Two blue buttons are highlighted: 'Set My Default Shipping' and 'Default Billing'.

Once selected a confirmation message will appear. The Defaults will be indicated by blue buttons in the Address List. Users must sign out and sign back in for this change to take effect.

SET MY DEFAULT ADDRESS

Your default address has been updated.

NOTE: This default designation will not take effect until you sign out and close your browser software. It will appear in your next TxSmartBuy session.

OK

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. If you need to change the address type you can select edit and make the correction.

This close-up shows three buttons: a grey 'Edit' button with a pencil icon, a grey 'Deactivate' button with a trash icon, and a blue 'Set My Default Shipping' button with a star icon.

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.

Filter Addresses

<input type="text" value="Location Code"/>	<input type="text" value="Contact Name"/>	<input style="border: none;" type="text" value="Select an Address Type"/>
<input type="text" value="Street Name"/>	<input type="text" value="City"/>	<div style="border: 1px solid gray; padding: 2px;"><div style="background-color: #0070C0; color: white; padding: 2px;">Select an Address Type</div><div style="padding: 2px;">Shipping</div><div style="padding: 2px;">Billing</div></div>
		<input type="button" value="Search"/> <input type="button" value="Clear Filters"/>

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