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DESIGN MANAGER CLOUD

GETTING STARTED GUIDE

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INTRODUCTION

Design Manager has partnered with Skybox Innovations to bring you Design Manager in the Cloud. The Design Manager Cloud employs the latest Citrix Cloud Platform™ technology to give you fast and secure access to Design Manager from any computer with an Internet connection. Design Manager also supports many devices and smart phones, such as the iPhone and iPad. This guide will help you get started using Design Manager.

SYSTEM REQUIREMENTS FOR RUNNING DESIGN MANAGER CLOUD

Please visit the link [here](#) for hardware requirements.

LOGGING INTO DESIGN MANAGER FOR THE FIRST TIME

IMPORTANT: The first time that you log-in to Design Manager you must use the ADMIN User Name and Password. The ADMIN Password is the first Password listed on your User Name and Password document emailed to the Admin on the account. Use a PC or Mac to log-in for the first time (for the iPhone or iPad see the instructions later in this guide).

To begin, open your Internet Web Browser.

Type the Internet Address below: (do not include “www.” on the front of the address). Type the address exactly as shown below with the “**https.**” You may also add it to your Favorites.

<https://login.designmanager.com>

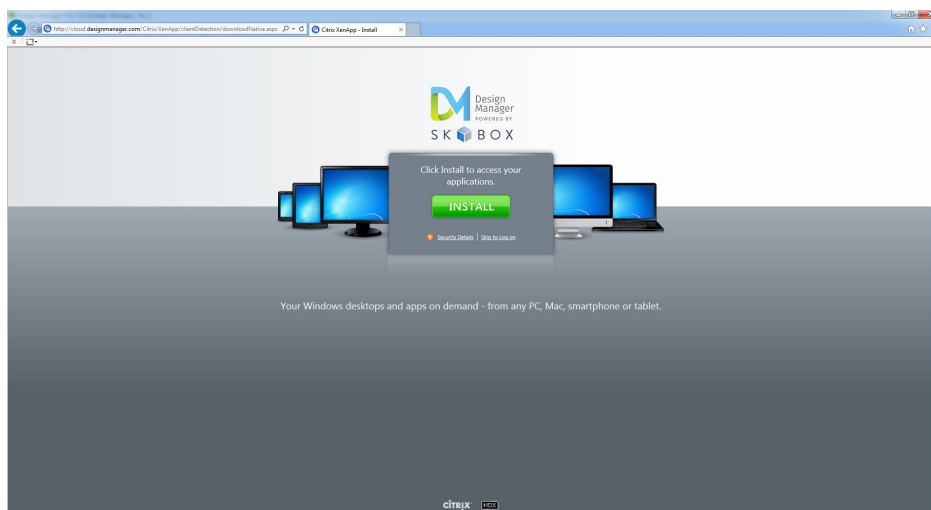
You will see the following web page...



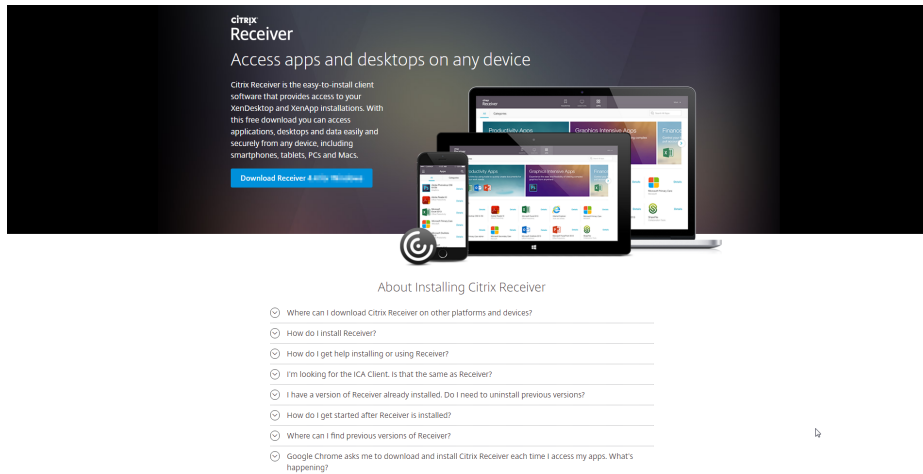
Type in the **ADMIN** User Name and Password provided in the email sent and then click Log On. Note that the User Name is **not** case-sensitive while the Password **is** case-sensitive.

If your computer does not have the Citrix Client software (currently called 'Citrix Workspace') installed then you will see the following web page prompting you to install the Citrix Client. Installing the Citrix Client only needs to be done once on each computer you wish to use to access Design Manager.

If you see the following window, click Install.

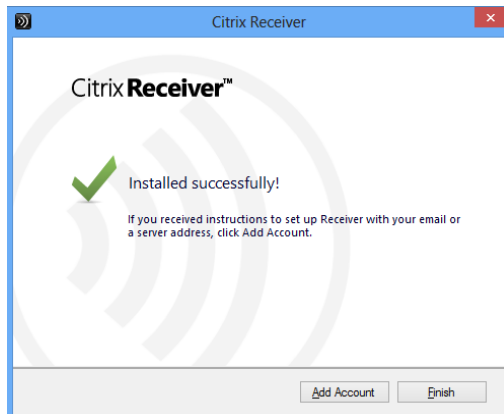


You'll be redirected to the download page for the Citrix Workspace; simply click download receiver.

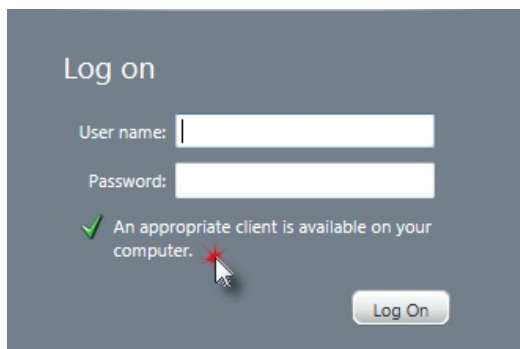


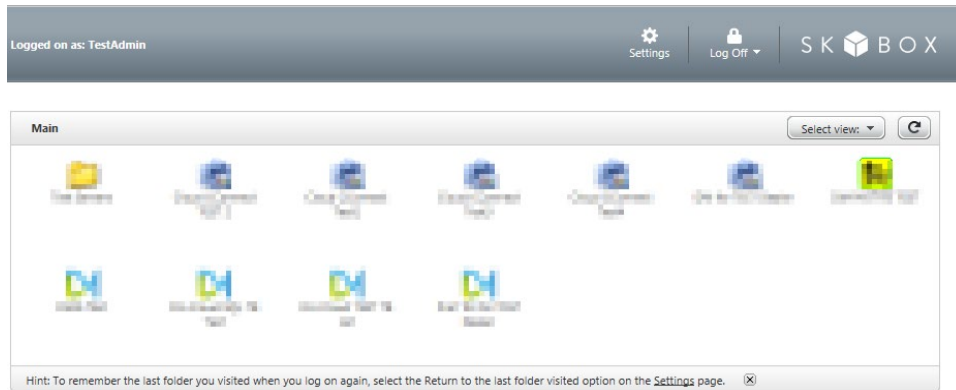
Once the receiver is downloaded, please be sure to Install the receiver as well. *Mac users will be required to enter their Mac computer password for installation.

If installation is completed successfully, you should receive this notification; simply choose "Finish".

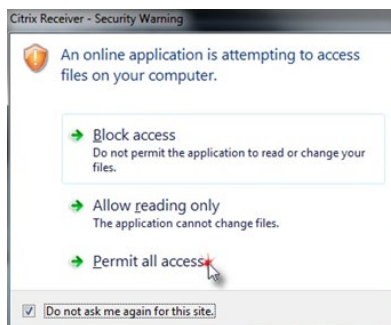


From this point forward there is nothing else to load. Go back to <https://login.designmanager.com> and log-in with your User Name and Password; then click on your Design Manager icon to start the application.





*Upon launching the program, most browsers, by default, will ask if you want to trust or allow this application to launch, always choose to allow and permit all access. If available, select the option for “Do not ask me again for this site”. Below are some examples of warnings you may receive:

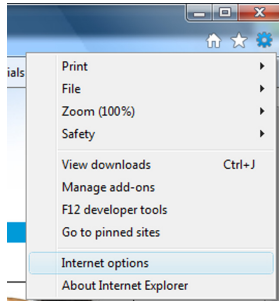


These warnings should only appear once if you check the box, “Do not ask me again for this site”. It is very important that you click Permit All Access and Permit Use. *Chrome browser users may be asked for these permissions each time you log in.

Internet Explorer Users:

For best user experience, it is suggested that you make changes to your internet settings.

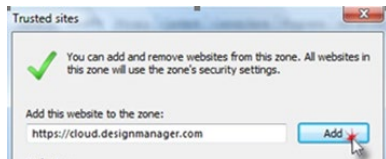
Choose the Tools button or the “Gear” icon then “Internet Options”.



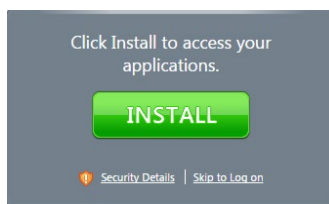
The second step is to click on the Security Tab and then the Sites button.



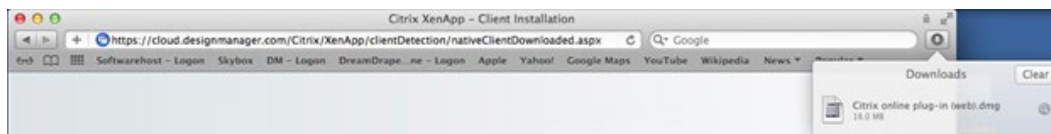
On the Trusted Sites Window, you will see the Design Manager website listed in the “Add this website to the zone” field. Click Add to move the Design Manager website into the “Websites:” field and then click Close.



Mac Users: You will proceed to <https://login.designmanager.com> and select to Install the Citrix Woprkspace (Client). Logging into the Design Manager Cloud web site will look slightly different.



Click the small Down Arrow Box in the upper right hand corner of your browser to see your downloads, and then click on the “Citrix Receiver.dmg” file to then run it.



A new window will appear (it may be hidden behind your internet browser window)

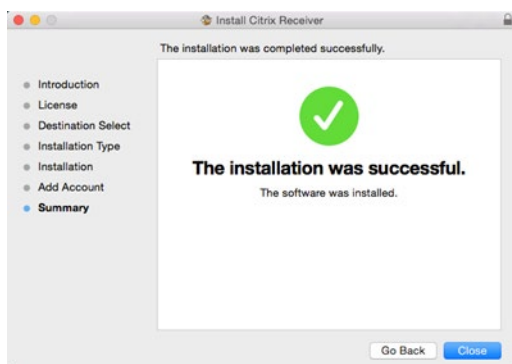
Double-click the “Install Citrix Receiver” option.



Click the Continue, Agree and Install Buttons until you are prompted to enter in your Mac computer User Name and Password. **Please note that this is NOT your Design Manager User Name and Password.**

Once the Installer has completed successfully and you see the window below, you can click Close.

Next, click on your Design Manager application icon and begin to use Design Manager.




If you experience any issues launching your application, please see more help provided [here](#).

Initial Log on

The first time that you log-in to Design Manager Cloud, the Terms of Service and End User License Agreement will appear. After you have reviewed the terms, click the check box next to the “By clicking...” line and then click “I Agree”. If you do not agree, click “I Decline.” (If you decline, you will not be able to use the program)

Design Manager Pro Cloud Terms of Service Agreement

 Please read the following...

A. DESIGN MANAGER ON-LINE GENERAL TERMS OF SERVICE. Thank you for selecting the Services offered by Design Manager, Inc. (referred to as "DM," "we," "our," or "us"). Please review these Terms of Service and End User Licenses Agreement ("Agreement" or the "LICENSE") thoroughly. This Agreement is a legal agreement between you and DM. By clicking "I AGREE," indicating acceptance electronically, accessing or using the Services or Software, you agree to these terms. If you do not agree to this Agreement, then do not indicate acceptance of the Agreement, and do not use the Services or Software.

BY USING THE DESIGN MANAGER ON-LINE SOFTWARE, YOU ARE AGREEING TO BE BOUND BY THE TERMS AND CONDITIONS OF THIS SOFTWARE LICENSE, TERMS OF SERVICE, AND USAGE AGREEMENT.

1. License. This exclusive access license and agreement (the "LICENSE") is between Franklin-Potter Associates, Inc., doing business as Design Manager, Inc. ("DM") and the end user (person clicking the "I Agree" button and the company to which the user is affiliated, is an employee of, or is working for (the "LICENSEE" or "you") and is effective immediately for usage of the Design Manager or Design Manager Professional On-Line Software via the DM Internet Site (the "LICENSED SOFTWARE" or "Service(s)") currently accessed via the Internet address softwarehost.designmanager.com or online.designmanager.com.

2. General. The LICENSED SOFTWARE includes the current version of the Design Manager Software product, access to the LICENSED SOFTWARE via the DM Internet Site and any accompanying documentation provided, whether on disk, in read-only memory, over the Internet, or on any other media or in any other form. The LICENSED SOFTWARE does not include the source code. The LICENSED SOFTWARE is licensed, not sold, to LICENSEE by DM for use only under the terms of this LICENSE, and DM reserves all rights not expressly granted to the LICENSEE. The terms of this LICENSE will govern any software upgrades provided by DM that replace and/or supplement the original LICENSED SOFTWARE, unless such upgrade is accompanied by a separate license in which case the terms of that license will govern.

3. Intellectual Property. LICENSEE does not own the LICENSED SOFTWARE but DM retains ownership of the LICENSED SOFTWARE and all intellectual property, including but not limited to data, copyrights, trademarks, and patents, associated therewith.

☐ By clicking the "I Agree" button, I accept the Terms of Service Agreement

The **Company Information Window** will appear next. Use the window to fill in your company's name and address information. Select OK when finished.

Company Information

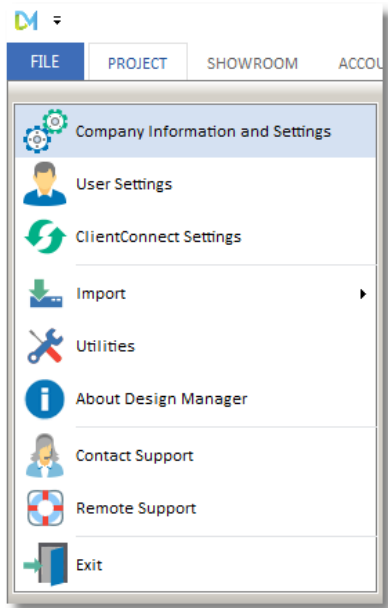
A/R & SHOWROOM PO / WO ITEM STATUS BUDGET SCHEDULE A/P PAYMENT LOGO QUICKQUOTE
COMPANY SALES & COGS ACCOUNTS OTHER ACCOUNTS USERS & SECURITY INVENTORY FISCAL MONTH

Name

Address City Phone
 State Fax
 Zip

Email Tax ID
 Website

You can edit this information at any time by choosing **File → Company Information & Settings**.



TESTING YOUR EMPLOYEE'S ACCOUNTS

Note: *If you have a single-user account then you may skip this section.*

If you have signed up for more than one user, then you will have received User Names and Passwords to give to your employees so that they can also access Design Manager. Now would be a good time to log-in as each of your other users to test their accounts. After you test each user you can then set the security for your employees if you do not want them to have access to your sensitive accounting information or particular areas of Design Manager.

To test each employee account, exit Design Manager and click on the Log Off button. Click on the link "Click here to return to the Logon Screen." Type in your first employee User Name and Password and then click Log On. Click on the Design Manager Icon to launch the application.

**See additional help [here](#). Should you need assistance or have trouble logging in, [Contact Design Manager Technical Support](#).*

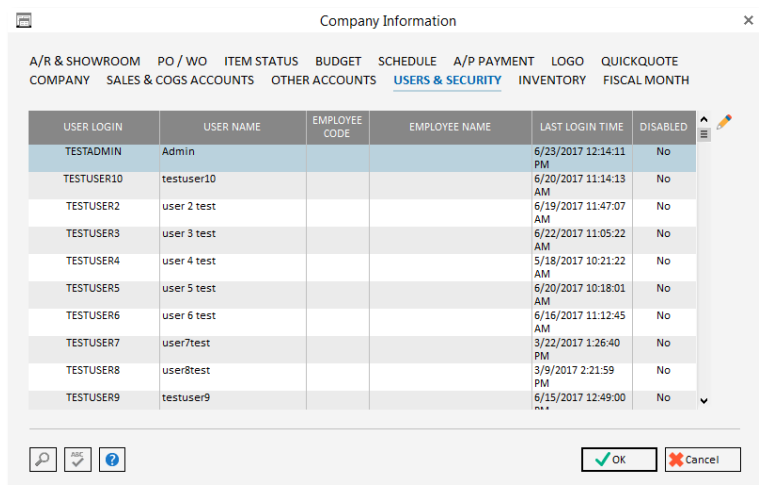
After testing the first account, exit Design Manager, click Log Off, and then test the next account; and so on for each user purchased.

SETTING SECURITY

If you have signed up for more than one user and you have tested each of your other user accounts, you may now set security settings and personal information for each of your users. Start by logging back into Design Manager as the Administrator using your ADMIN User Name and Password. Once inside your DM Program, Choose **File → Company Settings**, and then click

on the Password Tab (for Pro users, click on **Users & Security**). You will see each of your users on the list.

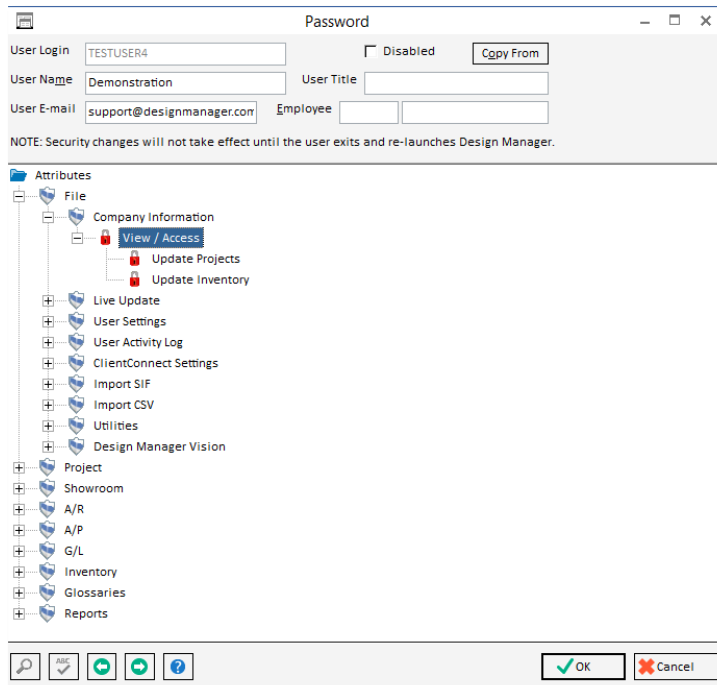
Note: If the user does not appear on the list, test the user's account by logging in as that user. This will ensure that the user is added to the list so that the access rights can be edited.



USER LOGIN	USER NAME	EMPLOYEE CODE	EMPLOYEE NAME	LAST LOGIN TIME	DISABLED
TESTADMIN	Admin			6/23/2017 12:14:11 PM	No
TESTUSER10	testuser10			6/20/2017 11:14:13 AM	No
TESTUSER2	user 2 test			6/19/2017 11:47:07 AM	No
TESTUSER3	user 3 test			6/22/2017 11:05:22 AM	No
TESTUSER4	user 4 test			5/18/2017 10:21:22 AM	No
TESTUSER5	user 5 test			6/20/2017 10:18:01 AM	No
TESTUSER6	user 6 test			6/16/2017 11:12:45 AM	No
TESTUSER7	user7test			3/22/2017 1:26:40 PM	No
TESTUSER8	user8test			3/9/2017 2:21:59 PM	No
TESTUSER9	testuser9			6/15/2017 12:49:00 PM	No

Highlight the user you wish to change and click the Edit or Pencil button next to the grid. At the top of the window you may type in your Employee's Name, Title, and Email address. The Title and E-mail fields are optional, but you **MUST** enter a User Name.

Next, you can change the employee account to limit access to different parts of the software. The first function to which you should restrict access is the Company Window itself. To change the employee so that they cannot edit the company information and cannot change any of these security settings, click on the plus sign in front of Company Information and then double-click on the lock in front of the word "View/Access" and the lock will close. The closed lock indicates that this employee does not have access to view or edit any information in the Company Information Window. In a similar fashion, you can grant or restrict access to almost every aspect of Design Manager. **NOTE: the Administrator account security cannot be changed.**



For more information on setting security, please see Passwords in the Help section of Design Manager on the main toolbar, or view our webinar regarding user security [here](#).

Once all security has been set, you may hand out a User Name and Password to each of the other employees in your office that you wish to have access to Design Manager. Each user will need to install the Citrix Client on their computers. They will use the logging in steps from above, however, they will enter the User Name and Password that you have given them.

CHANGING PASSWORDS

To change your Password, log-in to the Design Manager Cloud web site and then click “Settings” at the top Right. You do not need to open the Design Manager application.



In the Password Section, click the Change Password button.

Settings Save Cancel

General
 Configure settings that are applied across the whole Web site

Language: English

☐ Show Search

☒ Show Hints (Full Graphics only)

☐ Return to the last folder visited [?](#)

Client for accessing virtual desktops and applications

The **Native Client** is currently selected.

Run Client Detection

Password
 Change password

Change Password

For your security the **Guidelines for Creating Passwords** are as follows:

- The Password **MUST** be at least 7 characters or more
- The Password **MUST** include at least 1 Upper Case Letter, 1 Lower Case Letter and 1 Number
- You cannot change the password more than once in a 24 hour period
- You cannot use a previous password or a password that is similar to a previous password
- Special characters can be used and make the Password even more secure

*Should you or any of your employees forget their Password, you **must** [contact Design Manager Technical Support](#) to have the Password reset. There will be a **\$35.00 charge** to have Passwords reset each time, so be careful not to forget your Password.*

If you need to remove an employee's access immediately (you want to disable their account), log into the Design Manager application as the ADMIN and go to File - Company Settings & Information – Passwords. Here you may highlight and edit their user. Select disable.

ACCESSING DESIGN MANAGER CLOUD FROM AN IPHONE OR IPAD

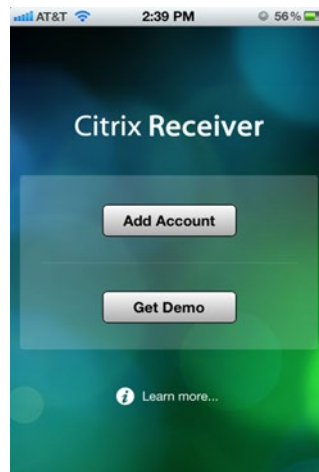
1. Before launching Design Manager from your iPad or iPhone, you must first install the Citrix app. You can download the app for free from the App Store. From your iPad or iPhone, open the App Store.

****To view a video of the installation steps, click [here](#).**



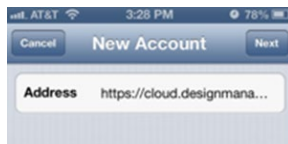
2. Search for "Citrix Receiver" and Click Get. Once it has finished installing the Get button will

now read Open. Click Open. Then Choose Add Account



3. Type the below address into the Address field and Click Next.

<https://login.designmanager.com>



4. Type the below information into the remaining fields and Click Save.

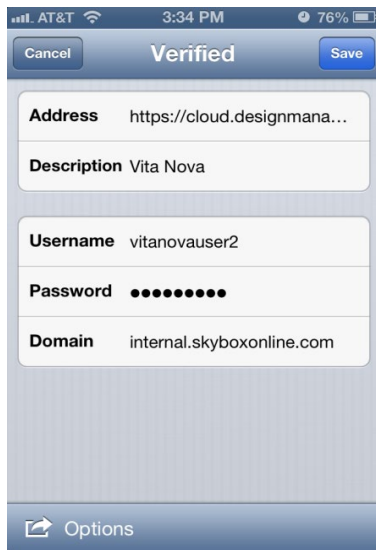
Description: type in your own description or leave the one that is already filled in

Username: use the name provided to you by DM

Password: use the password that you normally use to login

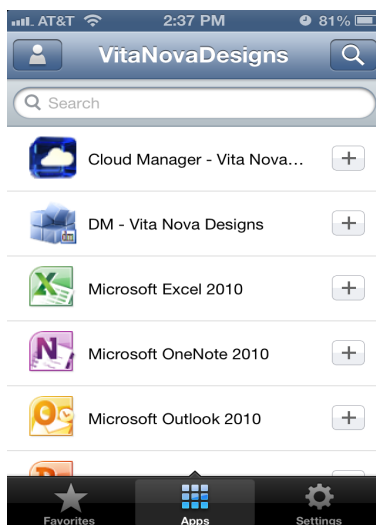
*****The Password is case sensitive*****

Domain: internal.skyboxonline.com

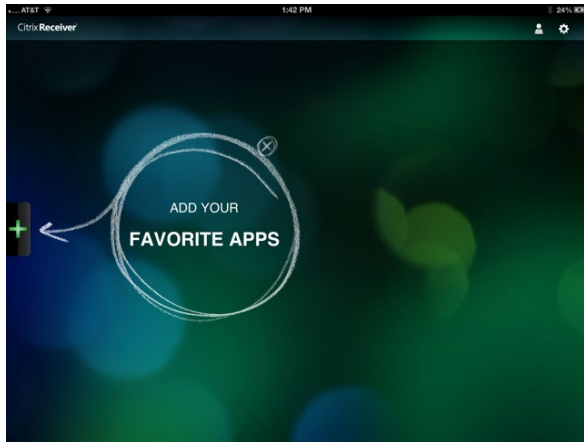


4. You will now see a list of your applications. (some users will just see the DM application)

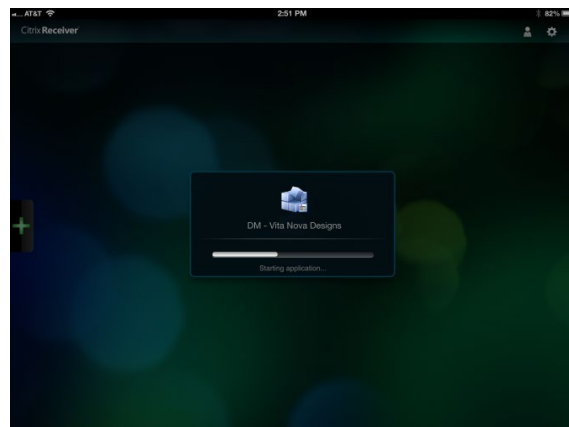
iPhone: Click on the DM Icon to launch the application.



iPad: Click the + sign on the far left side of the main window.



Click the + sign next to the applications that you want to appear on the main window. You will see a green check mark next to the applications that have appeared on the main window.



You are all set to use Design Manager from your iPad or iPhone!

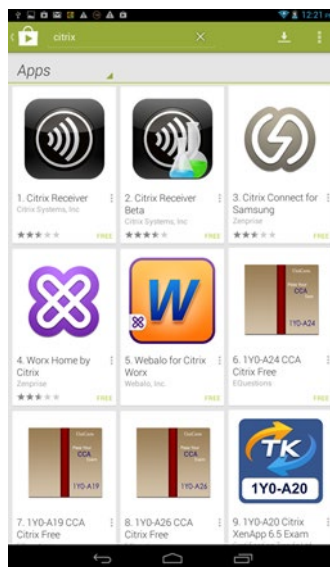
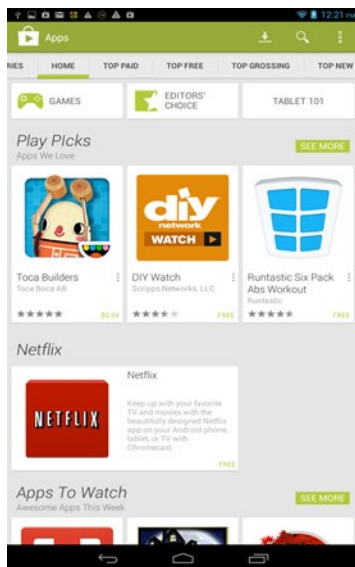
Simply click on the app to launch it. Once you have completed the app set up, you will not have to perform this procedure again

ACCESSING DESIGN MANAGER CLOUD FROM AN ANDROID

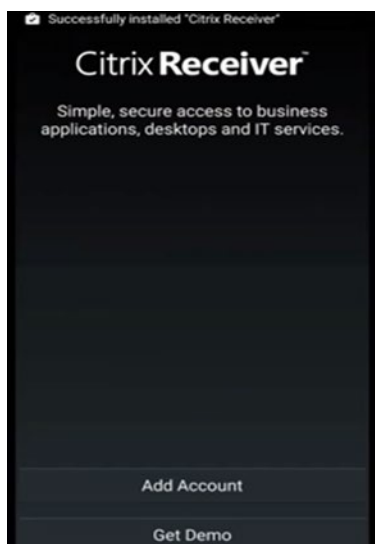
1. Go to the Play Store App



2. Touch the Magnifying glass and search for Citrix Receiver; then select the Citrix receiver app.



3. Touch Install -Select Accept and the download will begin.
4. Touch Open when the download is completed.
5. Touch "Add Account" option at the bottom of the screen.

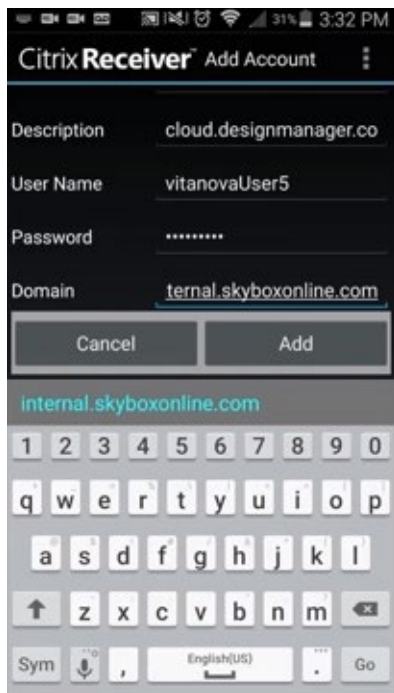


6. Type <https://login.designmanager.com> for the Address then select Next.
7. Type in the User Name provided when you signed up for Design Manager Cloud

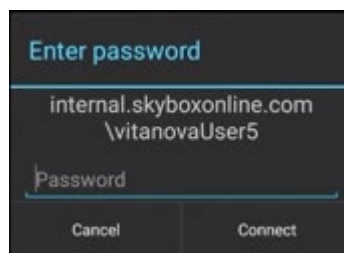
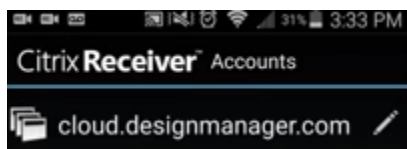
Type in your Password

Domain: type internal.skyboxonline.com

Touch Add



8. Open your newly added account by touching “login.designmanager.com”. Enter your password and press connect.



9. If done correctly, you should see your application listed, simply click the app to launch.

You are all set to access Design Manager from your Android Device!

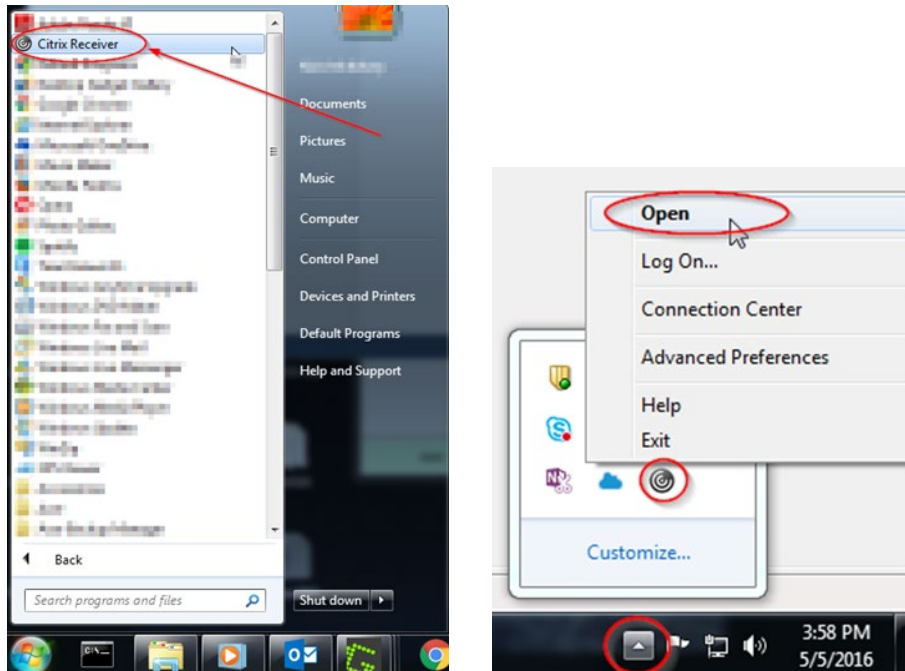
Once you have completed the app setup, you will not have to perform this procedure again.

CREATING AN ICON ON YOUR DESKTOP

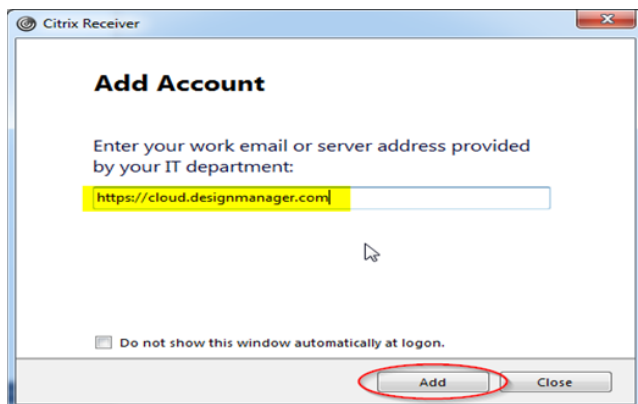
This will provide a desktop icon for automatic log-in to the cloud.

For PC Users: (Mac users, see page 20)

1. Open the Citrix Receiver, you can do this by finding it in your programs list within your start menu or by finding it on your taskbar (right click the icon and choose open)

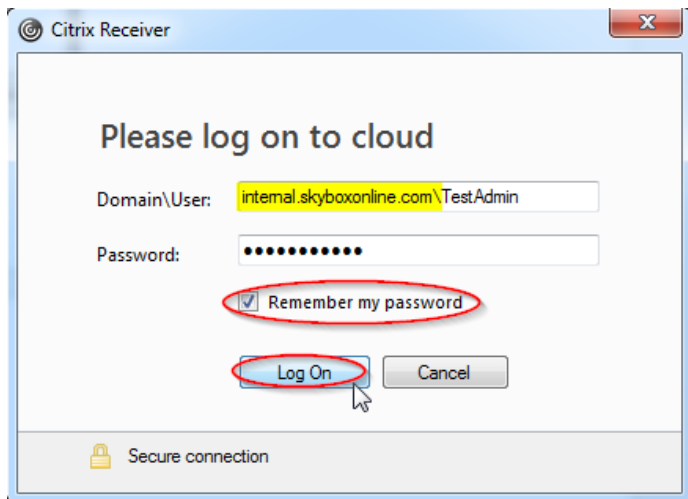


2. Next you'll be prompted to add an account.
Enter: <https://login.designmanager.com> for the server address, then choose Add.

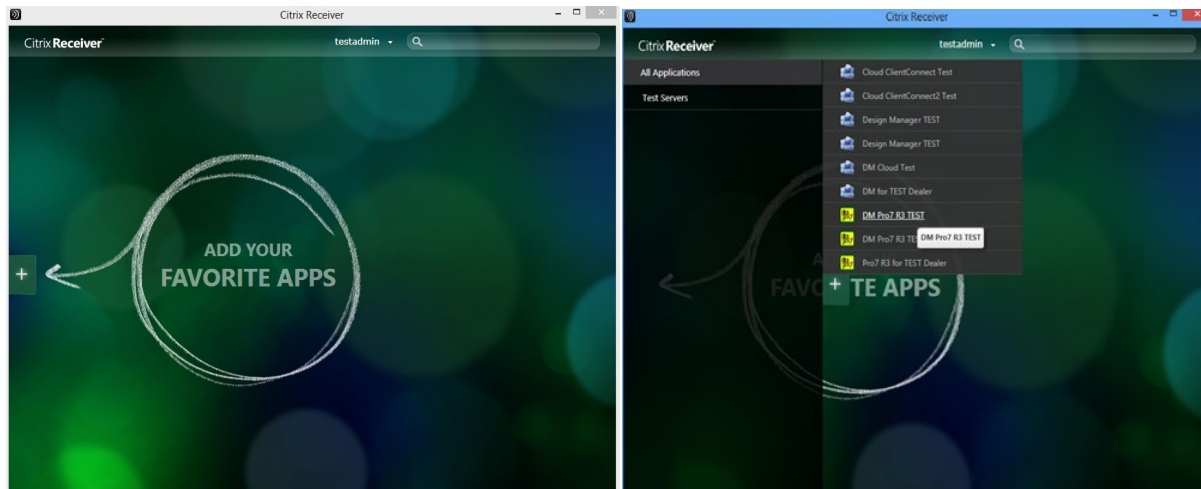


3. Next, you'll be prompted to enter the DOMAIN\username and password that was emailed to you, please enter the DOMAIN\username as follows: **internal.skyboxonline.com\your username**) then enter your password. Select "Remember my password" and choose log on.

*****It is important that there are no spaces entered; also be sure you're using the correct slash "\". NOTE: The password IS case sensitive.




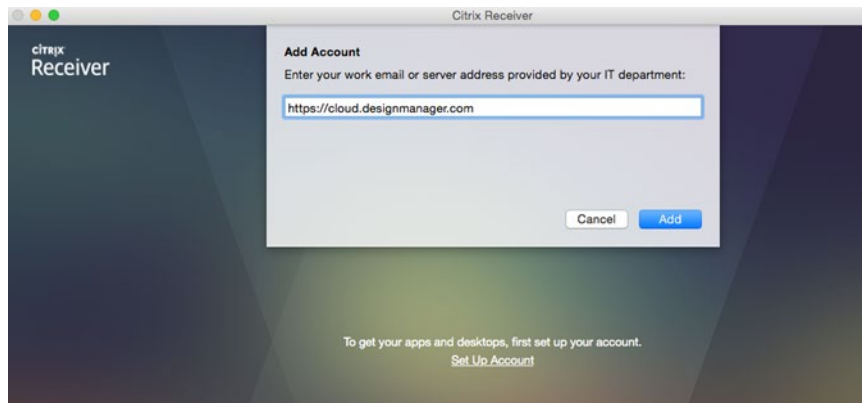
4. If done correctly, you will be greeted by a green window that will ask you to "add your favorite apps", simply click the "+" symbol, then choose "All Applications" and choose your Application.



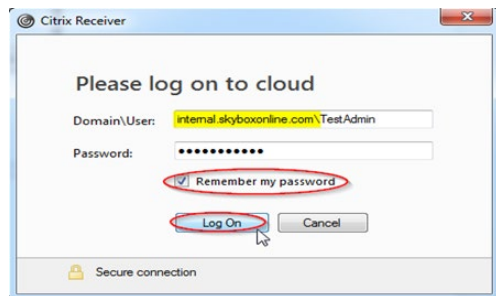
5. To launch the program, you can click on the Application Icon here, or go to your Start window, the App will also be available there.
6. If you choose to bring the application to your desktop (some operating systems will add the application to the desktop automatically) you can find the app in your start menu, simply drag and drop the application from your programs list to your desktop.

For Mac Users:

1. Open the Citrix Receiver, you can do this by going to “Go, Applications, and selecting Citrix Receiver” or by finding the Citrix icon at the top right of your screen , right click and select open.
2. Enter the following Email/Server Address/URL: <https://login.designmanager.com>

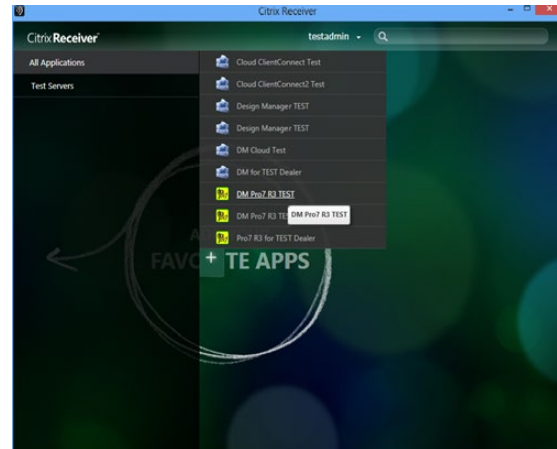
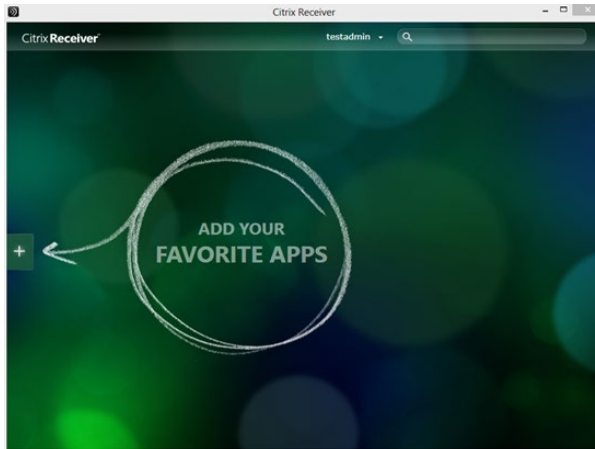


3. Choose “Add”, you’ll then be prompted to enter the DOMAIN and username. For the DOMAIN, please use: internal.skyboxonline.com\ (Username). Be sure to select “Remember my password” and select Log On.



Your User Name will be the one you were sent by Design Manager. In the sample above the User Name was TestAdmin, but your User Name will be different.

4. If entered correctly, you’ll be greeted by a green window that will ask you to “add your favorite apps”, simply click the “+” symbol, then choose “All Applications” and choose your Application.



5. You can then drag the icon onto your desktop by clicking on the Design Manager Icon, holding down the mouse button and moving the icon to your desktop. To launch the program, you will now only need to click on the desktop icon created.

DIFFERENCES BETWEEN DESIGN MANAGER AND DESIGN MANAGER CLOUD

Since Design Manager Cloud is not actually installed on your computer, there are several differences between the versions to keep in mind...

1. Each username and password is tied to a set of security settings of your choice and to an email address; therefore, sharing passwords for logging into Design Manager Cloud is not recommended. You cannot change the user names in Design Manager Cloud and changing passwords is left up to each individual using the change password feature of the Design Manager Cloud Access web page.
2. Outlook Sync does not work with Design Manager Cloud unless you are also using CloudSpace.
3. Printing has always been one of the most difficult chores for computers to accomplish. Design Manager Cloud uses an advanced printer driver to allow access to the printers attached to your computer or network. Since this driver allows Design Manager to send printing to almost any make or model of printer, some advanced printing options, common only to your printer, may not be available. These options include, but are not limited to, paper tray selection, color printer settings, advance multi-function printer settings, etc. To use the advanced settings of your printer, you may export any report or document in Design Manager to a PDF file and then print the file from your local computer.

4. When loading or saving files, Design Manager Cloud automatically displays all of the local drives on your computer. There is also a Favorites list at the top where you can add your most frequently used folders. For example, browse to your My Pictures folder and drag that folder to the Favorites list. From now on you can easily access your My Pictures folder with one click.
5. Design Manager Cloud Professional does not support batch faxing/e-mailing of Purchase Orders, but you should still be able to print your document to a fax printer.
6. When using Design Manager Cloud, sound quality, screen resolution, and colors are automatically adjusted to fit your Internet connection speed. In other words, the faster your Internet connection, the clearer the sounds and graphics will look when using Design Manager Cloud.

DESIGN MANAGER CLOUD “DOWN TIMES”

Design Manager endeavors to perform internal maintenance at times when the majority of Cloud users are not actively using the service, such as Sundays, late at night or between 3am and 5am ET. At such time, updates are applied, database maintenance is run, and back-ups of your data are completed. There may occasionally be some additional, unscheduled instances when the service is unavailable, such as when Design Manager adds or upgrades equipment, but those are kept to an absolute minimum.

Your Internet Service Provider may also have scheduled or periodic maintenance resulting in a loss of connection to the Internet and, therefore, Design Manager Cloud. You may wish to contact your provider to inquire if and when such maintenance occurs.