



TOUCHSTONE



Vendor User Management

This document describes the roles, actions and interaction patterns of the Vendor User Management application.

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Quick Reference Guide

Role capabilities

Role	Key Capabilities
PFM Supervisor	User management, vendor management, dashboard access
Vendor Supervisor	User management, dashboard access
(PFM/Vendor) Technician	Touchstone Mobile downloads only

Role Permissions Summary

Feature	PFM Supervisor	Vendor Supervisor	Technician (PFM/Vendor)
User Dashboard	YES	YES	NO
Add/Edit Users	YES	YES	NO
Manage Vendors	YES	NO	NO
Download Touchstone	YES	YES	YES
Help	YES	YES	YES

Signing In

1. Enter the short code and select "Continue"
2. Confirm company access and select "Get access"
3. Choose your login method:
 - o **Email:** Enter credentials → Request & enter 2FA code → Continue to dashboard
 - o **PFM SSO:** Follow standard SSO login procedure
 - o **Microsoft SSO:** Follow standard Microsoft login procedure

Dashboard Navigation

- **Expand/Collapse** menu using sidebar toggle
- **Search** for users by name or email
- **Filter** by status (Active/Pending/Inactive)
- **Filter** by vendor (PFM Supervisor only)
- **Navigate** using pagination controls

User Management

Adding New Users

1. Select "Add New User"
2. Complete required fields (vendor field available to PFM Supervisor only)
3. Submit to generate invitation link (except for PFM Technician role)
 - For PFM Technicians: Must select authorized internal vendor

Managing Existing Users

- **Edit:** Update details for Active/Pending users
- **Disable:** Remove access for Active/Pending users (prompts warning)
- **Reinvite:** Generate new invitation link for Pending users
- **Enable:** Restore access for Inactive users

User Invitation Process

1. User receives invitation link
2. User requests verification code
3. User enters verification code
4. User selects sign-up method and completes registration

Touchstone Download

- Available to all roles through the download page

Help documents

- Available to all roles through the help page


Appendix

Feature Role Matrix

Task/Feature	Description	PFM Supervisor	Vendor Supervisor	Technician (PFM/Vendor)
User Management				
Add User	Create a new user, assign roles, permissions, vendor and site.	YES	YES	NO
Edit User	Modify existing user account details (name, contact info, role, etc.).	YES	YES	NO
Disable User	Revoke access to the system for an existing user.	YES	YES	NO
Enable User	Enable access to the system for an existing user.	YES	YES	NO
Reinvite User	Generate new invitation link for a pending user.	YES	YES	NO
Dashboard				
View User Dashboard	Access dashboard with list of user details and status.	YES	YES	NO
Search users	Search for users by name or email	YES	YES	NO
Filter by Vendor	Filter the user list by the vendor they are associated with.	YES	NO	NO
Filter by Status	Filter the user list by their account status (Active, Pending, Inactive).	YES	YES	NO
Other				
Download Touchstone	Links to download Touchstone	YES	YES	YES
View Help	Access help documents	YES	YES	YES

Signing in

Enter the short code and press “Continue”


**TOUCHSTONE**
Login by entering your code

Short Code*
VUM-UAT

CONTINUE

By **CERTUS**

Confirm you are accessing the right company and press “Get access”

**TOUCHSTONE**
Are you requesting access to this company?

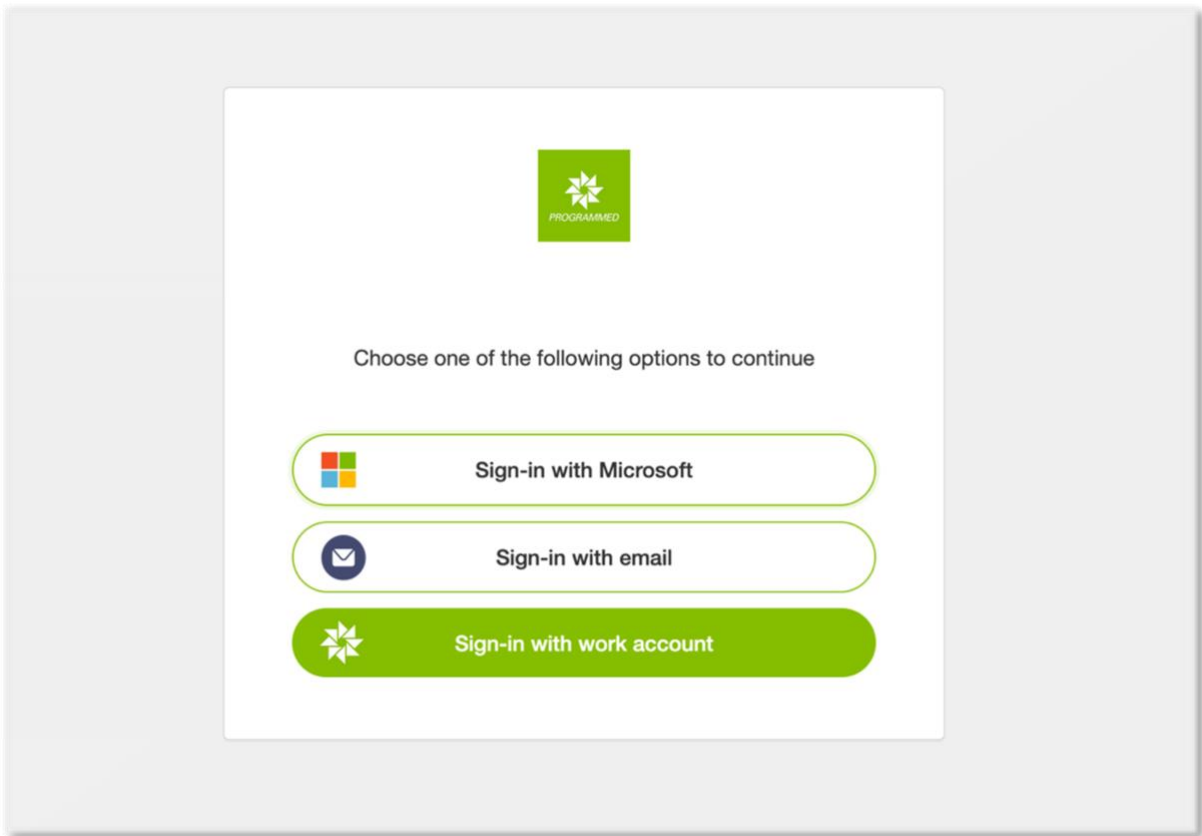
VUM UAT

GET ACCESS

GO BACK

By **CERTUS**

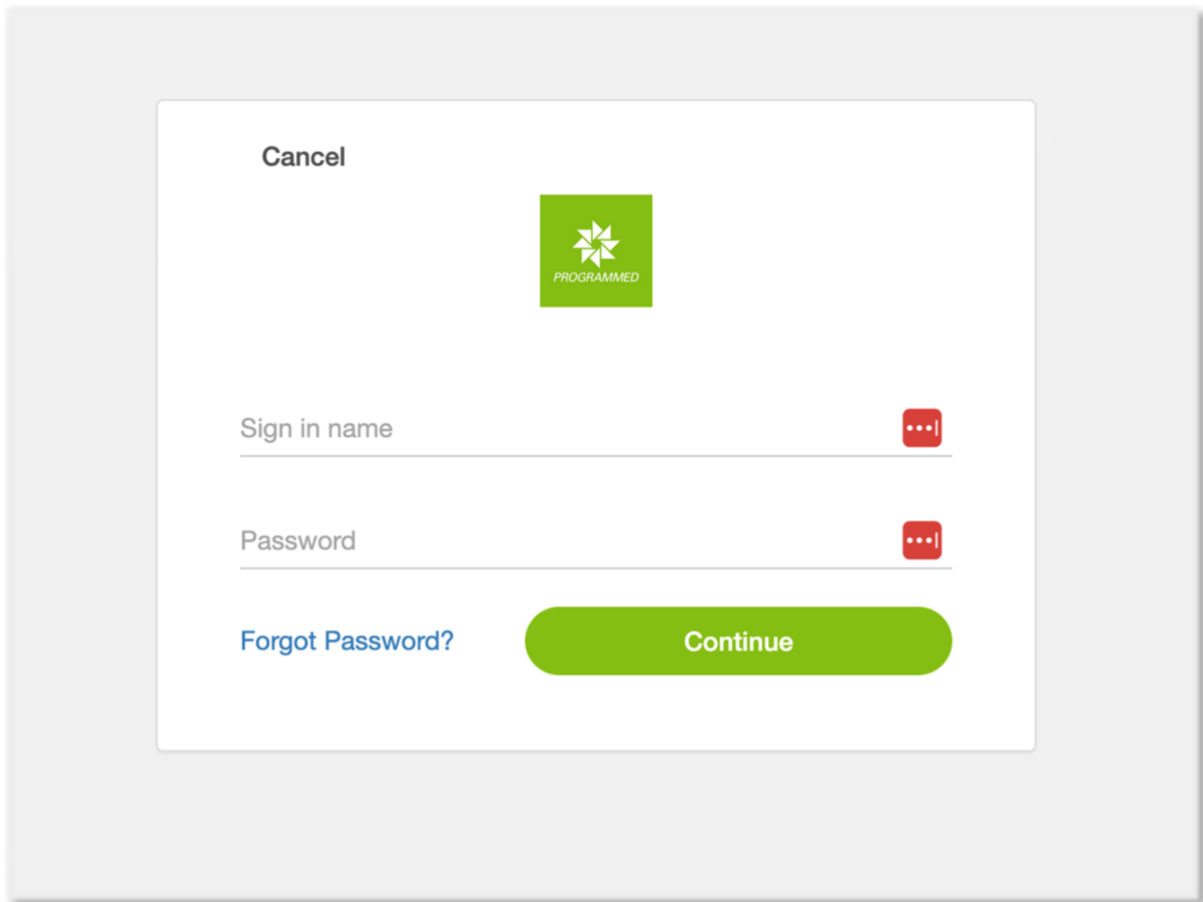
Select the login method to use



Login via PFM SSO

Login via Email


Select the email option and fill in the credentials




A login form with a white background and a light gray border. At the top left is the text "Cancel". In the center is a green square logo with a white starburst pattern and the word "PROGRAMMED" below it. Below the logo are two input fields: "Sign in name" and "Password". Each field has a red eye icon to its right. At the bottom left is the text "Forgot Password?". At the bottom right is a green rounded button with the text "Continue".

Request a 2FA code

Cancel




Verification code will be sent to your registered email address.
Please choose "Send verification code" to receive the code.

carl.g.robinson+vumsuper1@gmail.com 


[Send verification code](#)

Enter 2FA code

Cancel

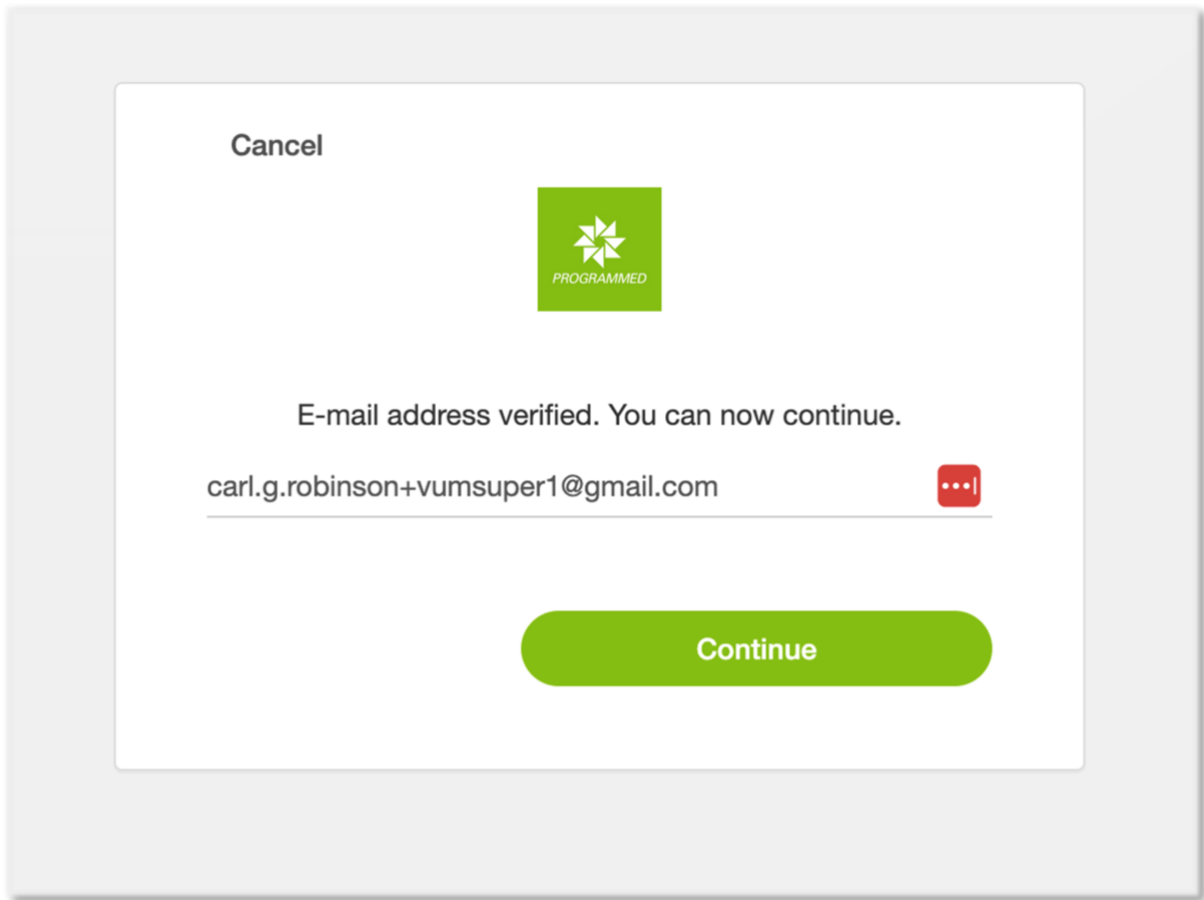


Verification code has been sent to your inbox. Please copy it
to the input box below.

carl.g.robinson+vumsuper1@gmail.com 

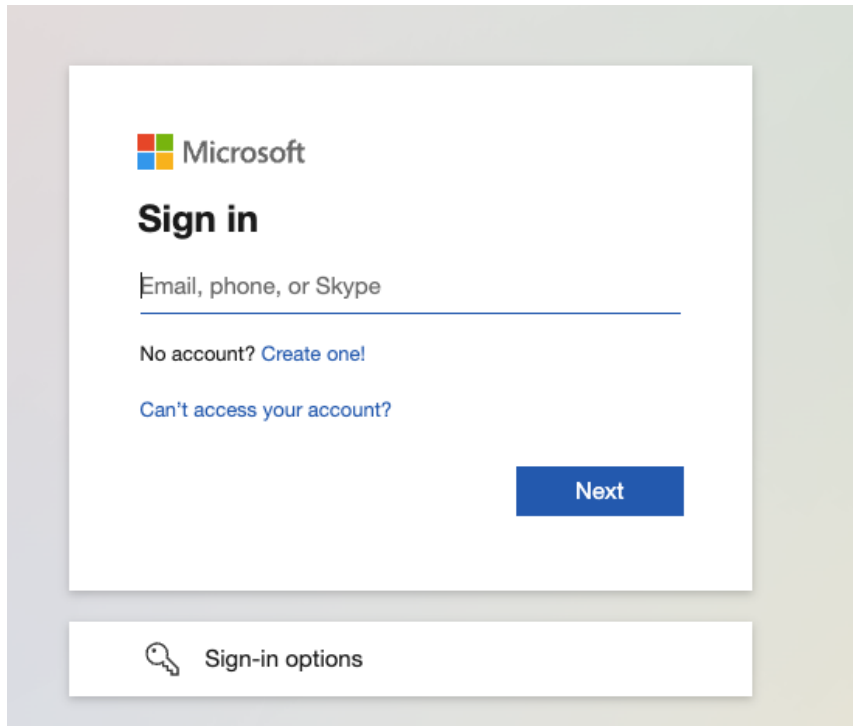
[Send new code](#) [Verify code](#)

Continue to dashboard



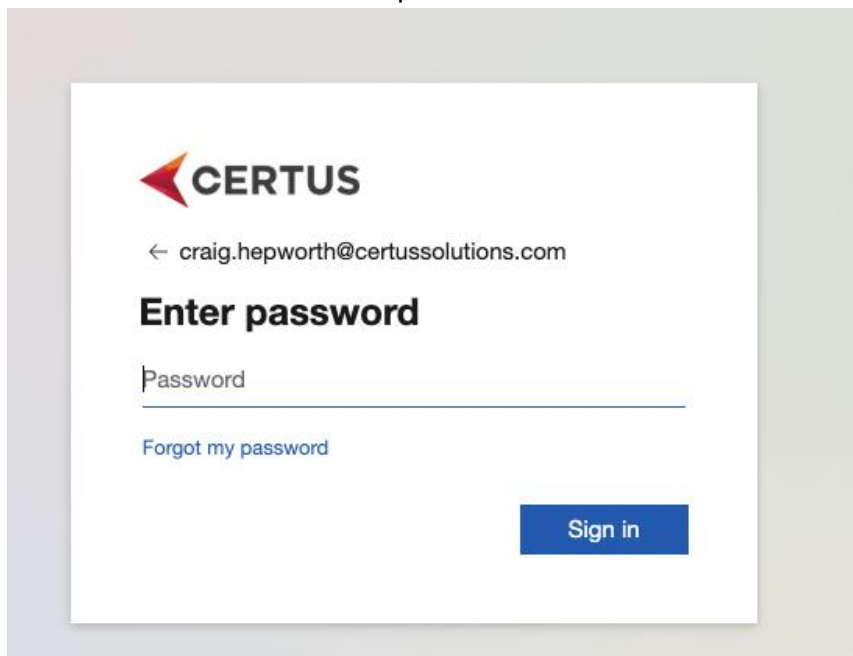
Login via Microsoft SSO

Enter the Microsoft account email address



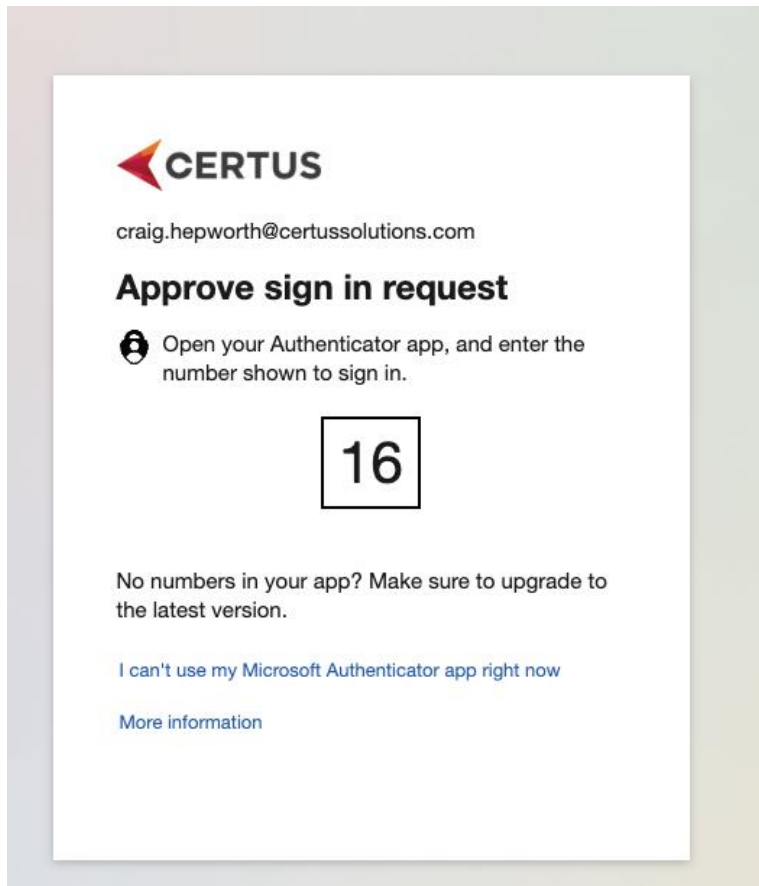
The screenshot shows the Microsoft sign-in interface. At the top left is the Microsoft logo. Below it, the text "Sign in" is displayed in a bold font. Underneath is a text input field with the placeholder text "Email, phone, or Skype". Below the input field are two links: "No account? Create one!" and "Can't access your account?". At the bottom right of the main content area is a blue button labeled "Next". Below the main content area is a white box containing a key icon and the text "Sign-in options".

Enter the Microsoft account password

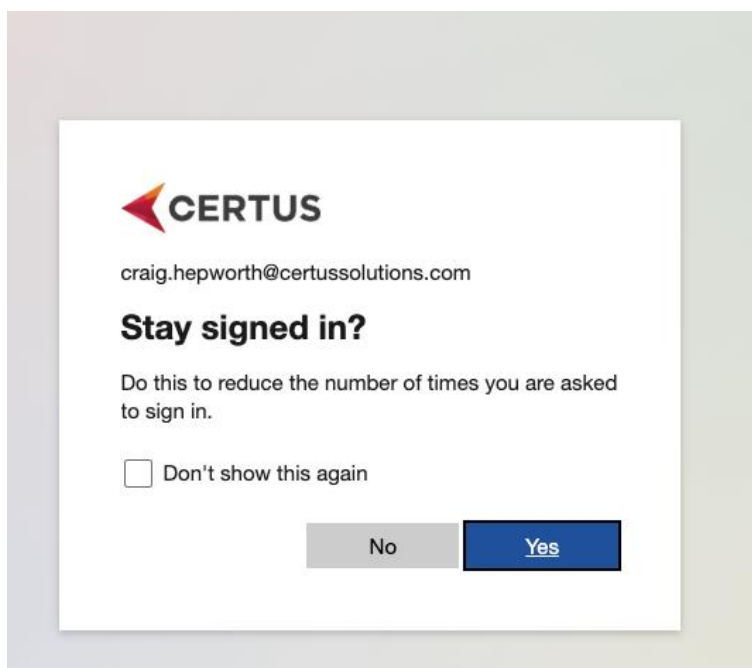


The screenshot shows the CERTUS password entry page. At the top left is the CERTUS logo. Below it is the email address "← craig.hepworth@certussolutions.com". The main heading is "Enter password" in a bold font. Below this is a text input field with the placeholder text "Password". Below the input field is a link that says "Forgot my password". At the bottom right of the main content area is a blue button labeled "Sign in".

Approve sign in using Microsoft authenticator app.



Press Yes



PFM/Vendor Supervisor Dashboard

Dashboard side menu can be expanded or collapsed

The screenshot shows the Touchstone dashboard with the side menu expanded. The side menu on the left contains the following items: Dashboard, Download Touchstone, Help, and Settings. The main content area displays a table of users with columns for Name, Status, Email, Contact, Vendor, and Role. The table contains 7 rows of user data. At the bottom of the table, there is a pagination control showing 'Rows per page: 25' and '1-7 of 7'.

Name	Status	Email	Contact	Vendor	Role
Jenny Armstrong	Inactive	DEV1_armstrong.j@salvationarmy.org.zzz.dev	0467 600 308	Certus Solutions	
Tung Duong Huy	Active	tung@comm-itgroup.com		Certus Solutions	
Anthony Evans	Inactive	DEV1_aevans@uniting.org.dev	0408 227414	Certus Solutions	
Major Alan MacDonald	Inactive	DEV1_alan.m@salvationarmy.org.zzz.dev	0487 335 147	Certus Solutions	
Carl Robinson	Active	carl.robinson@certussolutions.com		Certus Solutions	Vendor Supervisor
Alana Thompson	Inactive	DEV1_principal@karapiro.school.nz.dev	07 827 7642	Certus Solutions	
Nick Vasic	Active	nick.vasic@certussolutions.com		Certus Solutions	Vendor Supervisor

The screenshot shows the Touchstone dashboard with the side menu collapsed. The side menu is now represented by a vertical bar on the left with icons for Dashboard, Download Touchstone, Help, and Settings. The main content area displays the same table of users as the previous screenshot. The pagination control at the bottom of the table shows 'Rows per page: 25' and '1-7 of 7'.

Name	Status	Email	Contact	Vendor	Role
Jenny Armstrong	Inactive	DEV1_armstrong.j@salvationarmy.org.zzz.dev	0467 600 308	Certus Solutions	
Tung Duong Huy	Active	tung@comm-itgroup.com		Certus Solutions	
Anthony Evans	Inactive	DEV1_aevans@uniting.org.dev	0408 227414	Certus Solutions	
Major Alan MacDonald	Inactive	DEV1_alan.m@salvationarmy.org.zzz.dev	0487 335 147	Certus Solutions	
Carl Robinson	Active	carl.robinson@certussolutions.com		Certus Solutions	Vendor Supervisor
Alana Thompson	Inactive	DEV1_principal@karapiro.school.nz.dev	07 827 7642	Certus Solutions	
Nick Vasic	Active	nick.vasic@certussolutions.com		Certus Solutions	Vendor Supervisor

Search for users by email or name

The screenshot shows the Touchstone user management interface. The user is logged in as Carl Robinson, Vendor Supervisor. The search bar contains the text 'carl'. The table below shows one result for Carl Robinson.

Name	Status	Email	Contact	Vendor	Role
Carl Robinson	Active	carl.robinson@certussolutions.com		Certus Solutions	Vendor Supervisor

Rows per page: 25 1-1 of 1


Navigate dashboard by pagination rows or page number

The screenshot shows the Touchstone user management interface with a list of users. The search bar is empty. The table below shows seven users. A dropdown menu is open over the 'Rows per page' field, showing options 5, 10, 25, and 50.

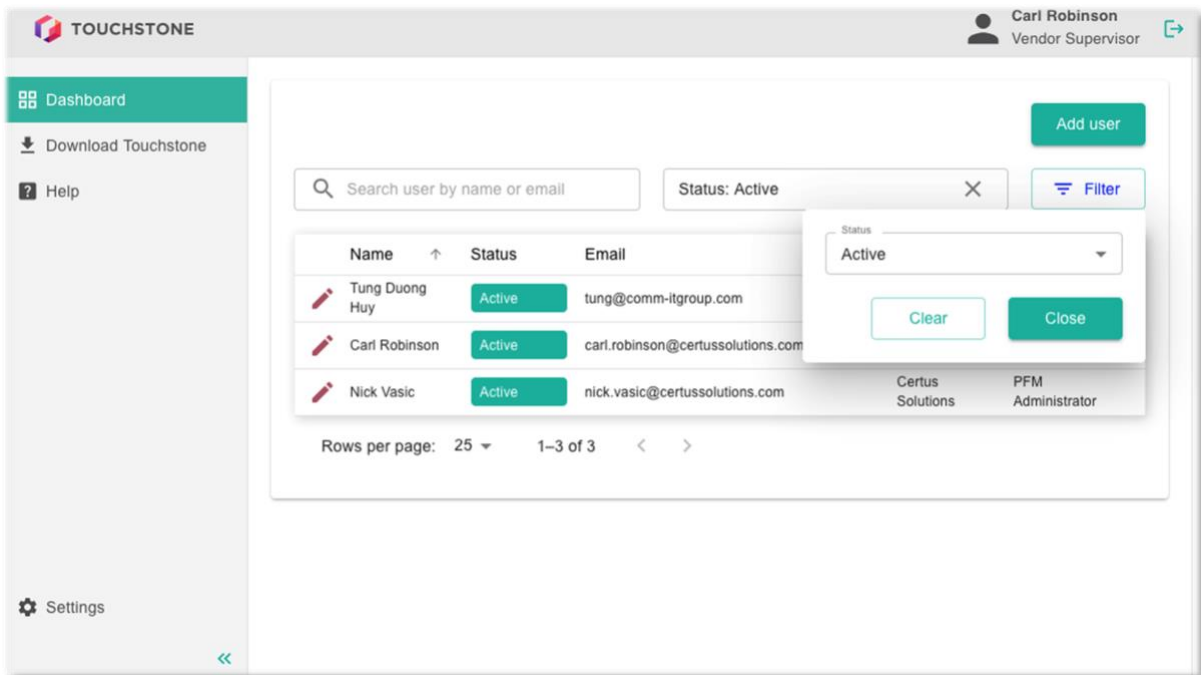
Name	Status	Email	Contact	Vendor	Role
Jenny Armstrong	Inactive	DEV1_armstrong.j@salvationarmy.org.zzz.dev	0467 600 308	Certus Solutions	
Tung Duong Huy	Active	tung@comm-igroup.com		Certus Solutions	
Anthony Evans	Inactive	DEV1_aevans@uniting.org.dev	0408 227414	Certus Solutions	
Major Alan MacDonald	Inactive	DEV1_alan.m@salvationarmy.org.zzz.dev	0487 335 147	Certus Solutions	
Carl Robinson	Active	carl.robinson@certussolutions.com		Certus Solutions	Vendor Supervisor
Alana Thompson	Inactive	DEV1_principal@karapiro.school.nz.dev	07 827 7642	Certus Solutions	
Nick Vasic	Active	nick.vasic@certussolutions.com		Certus Solutions	PFM Administrator

Rows per page: 5 10 25 50 1-7 of 7




Sort columns by user's name or status by selecting the up/down arrow next to column

Name	↑	Status
 2Big 2Weld		Active

Filter dashboard by status (Active, Pending or Inactive)



The screenshot shows the Touchstone user management interface. The top navigation bar includes the Touchstone logo, the user name 'Carl Robinson', and the role 'Vendor Supervisor'. The left sidebar contains navigation options: Dashboard, Download Touchstone, Help, and Settings. The main content area features a search bar for users by name or email, a filter dropdown currently set to 'Status: Active', and an 'Add user' button. Below the search and filter is a table of users with columns for Name, Status, and Email. A status filter dropdown is open, showing 'Active' as the selected option, with 'Clear' and 'Close' buttons. The table lists three users: Tung Duong Huy, Carl Robinson, and Nick Vasic, all with 'Active' status. The bottom of the table shows pagination information: 'Rows per page: 25' and '1-3 of 3'.

Name	↑	Status	Email
 Tung Duong Huy		Active	tung@comm-itgroup.com
 Carl Robinson		Active	carl.robinson@certussolutions.com
 Nick Vasic		Active	nick.vasic@certussolutions.com

Rows per page: 25 1-3 of 3 < >

Filter dashboard by vendor (PFM Supervisor only)

The screenshot shows the Touchstone dashboard interface. The top header includes the Touchstone logo, the user name 'Carl Robinson', and the role 'PFM Administrator'. The left sidebar contains navigation options: 'Dashboard', 'Download Touchstone', 'Help', and 'Settings'. The main content area displays a table of users with columns for Name, Status, and Email. A search bar is present above the table. A filter dropdown is active, showing 'Vendor: CERTUS7 - PFM - Certus S' and a 'Filter' button. A modal window is open over the table, allowing selection of a vendor ('CERTUS7 - PFM - Certus Solu...') and a status. The table shows 5 rows of users, with the first two rows being 'Brand new' and 'Supervisor' status, and the last three being 'Technician' status. The pagination shows 'Rows per page: 25' and '1-5 of 5'.

Name	Status	Email
Carl Test Brand new	Pending	carl.g.robinson+vumbrandnew1@gmail.com
Carl Test Supervisor	Active	carl.g.robinson+vumsuper1@gmail.com
Carl Test Technician	Active	carl.g.robinson+vumtech2@gmail.com
Carl Test Technician	Pending	carl.g.robinson+vumtech1@gmail.com
Carl Test Technician 3	Pending	carl.g.robinson+vumtech3@gmail.com

Edit existing user

Edit Active/Pending user (vendor field disabled for Vendor Supervisors)

The screenshot shows the Touchstone PFM Administrator interface. A modal window is open for editing the user 'Carl Test Technician' from Certus Solutions. The modal contains the following fields:

- First Name ***: Carl
- Last Name ***: Test Technician
- Contact Number ***: 023453453
- Email ***: carl.g.robinson+vumtech2@gmail.com
- Role ***: Vendor Technician
- Vendor ***: CERTUS7 - PFM - Certus Solutions
- Site ***: ACT Courts, DLGSC, Culture & the Arts Portfolio - MSA

Buttons for 'Cancel' and 'Save' are at the bottom of the modal. A 'Disable' button is located in the top right of the modal header. The background interface shows a sidebar with 'Dashboard', 'Download Touchstone', 'Help', and 'Settings'. The top right shows the user 'Carl Robinson, PFM Administrator' and an 'Add user' button. A table of users is visible on the right side of the background interface.

Vendor	Role
Certus Solutions	Vendor Technician
Certus Solutions	Vendor Supervisor
Certus Solutions	Vendor Technician
Certus Solutions	Vendor Technician
Certus Solutions	Vendor Technician

View mode only for Inactive user. Enable user to edit

George Cooke
Bex Pneumatic Systems
Inactive Enable

First Name * ⋮

Last Name *

Contact Number *

Email *

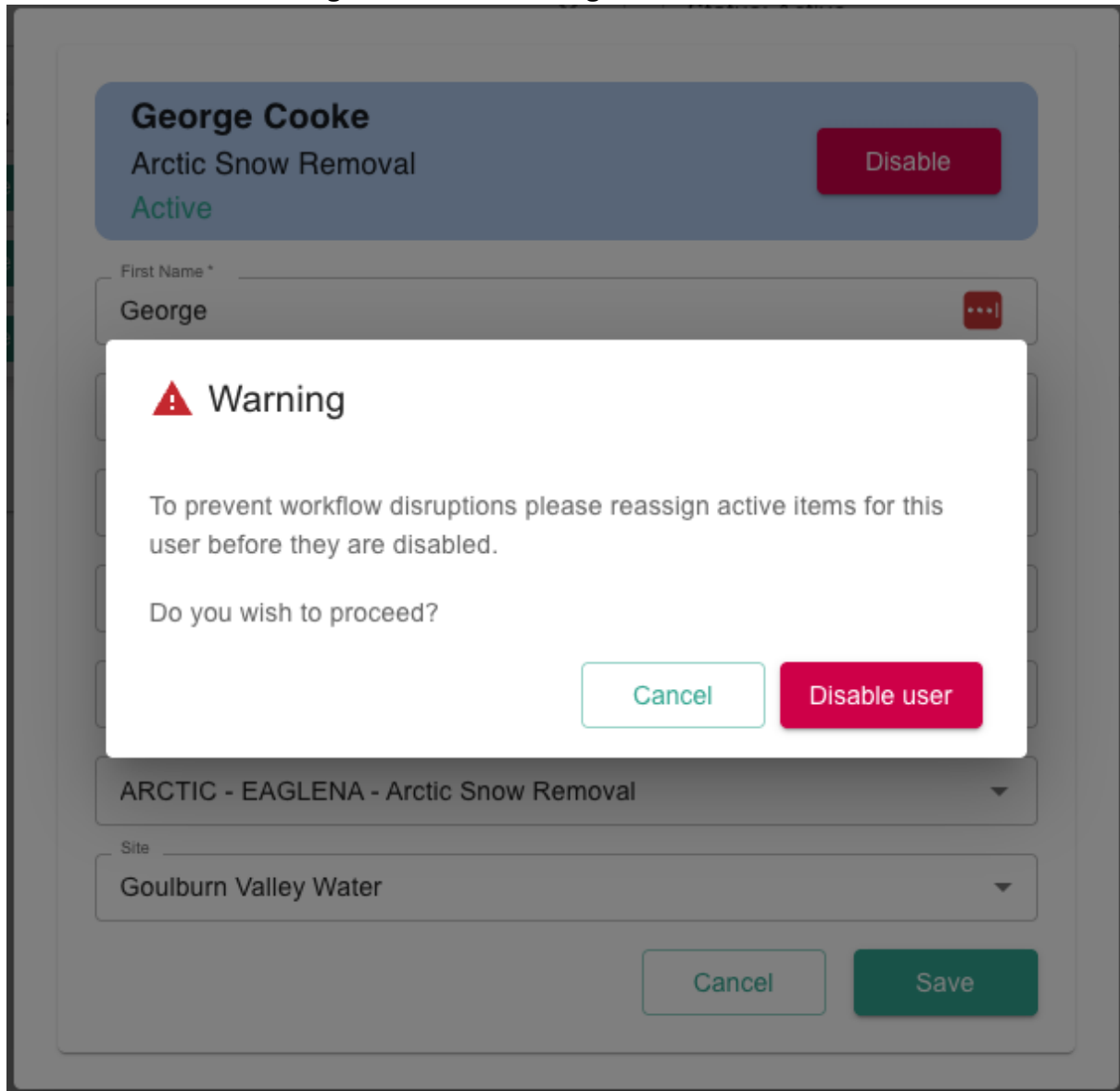
Role * ▼

Vendor * ▼

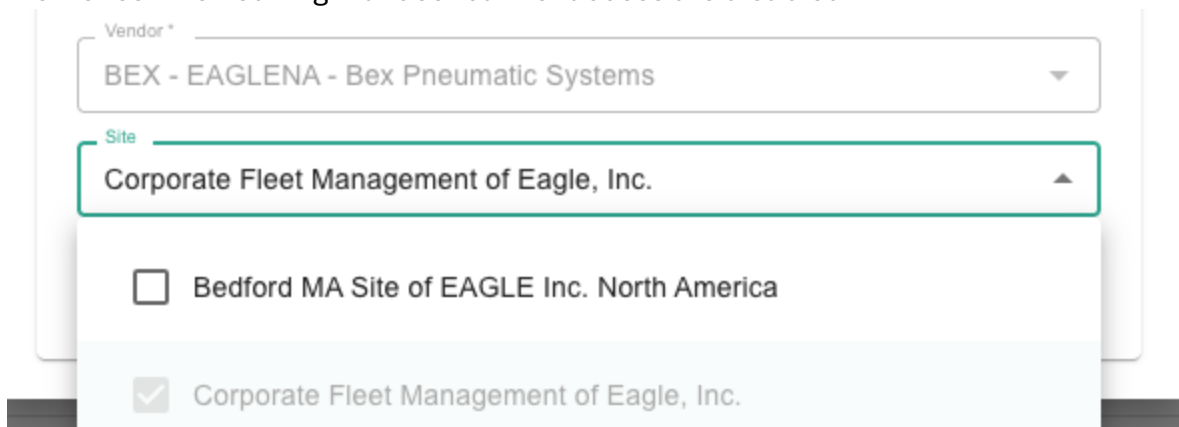
Site ▼

Cancel Save

Disable an Active/Pending user shows warning



View sites when editing that user cannot access are disabled



Reinvite a Pending user to generate a new invitation link

Craig Hep
Bearings, Inc
Pending Disable

First Name *

Last Name *

Contact Number *

Email *

Role *

Vendor *

Site

Reinvite Cancel Save

Invitation link can be copied or shared

Invite sent

Invite has been sent to craig.hepworth+alias104@certussolutions.com. Please note that this activation link will not be accessible after closing this window.

<https://admin-dev.touchstone.works/invite/eyJhbGciOiJSUzI1NiI...> Copy

Close Share Link

User reinvited successfully

Editing yourself, only basic fields enabled

Craig Hep
Bex Pneumatic Systems
Active

First Name *
Craig

Last Name *
Hep

Contact Number *
027666612

Email *
chepworth17@gmail.com

Role *
Vendor Supervisor

Vendor *
BEX - EAGLENA - Bex Pneumatic Systems

Site
Bedford MA Site of EAGLE Inc. North America

Cancel Save

Edit PFM Technician only Vendor and Site fields enabled

Craig Hep100
Pending Disable

First Name *
Craig

Last Name *
Hep100

Contact Number *
0274999022

Email *
craig.hepworth+alias100@certussolutions.com

Role *
PFM Technician

Vendor *
PFMINTERNAL - EAGLESA

Site
Bedfor2 MA Site of EAGLE Inc. North America

Cancel Save

Onboard user

Add New User (vendor field disabled for Vendor Supervisors)

Onboard user

First Name *

Last Name *

Contact Number *

Email *

Role *

Vendor *

Site

Site is mandatory and multiple sites are allowed

Vendor *

Site *


Corporate Fleet Management of Eagle, Inc.

Goulburn Valley Water

Onboarding a new user generates an invitation link unless role is PFM Technician

Invite sent

Invite has been sent to craig.hepworth+alias104@certussolutions.com. Please note that this activation link will not be accessible after closing this window.


<https://admin-dev.touchstone.works/invite/eyJhbGciOiJSUzI1NiI...>  Copy

User reinvited successfully

Add new PFM Technician requires an authorized internal vendor. Error message will show if invalid vendor chosen.

Onboard user

First Name *

Last Name * 

Contact Number *

Email *

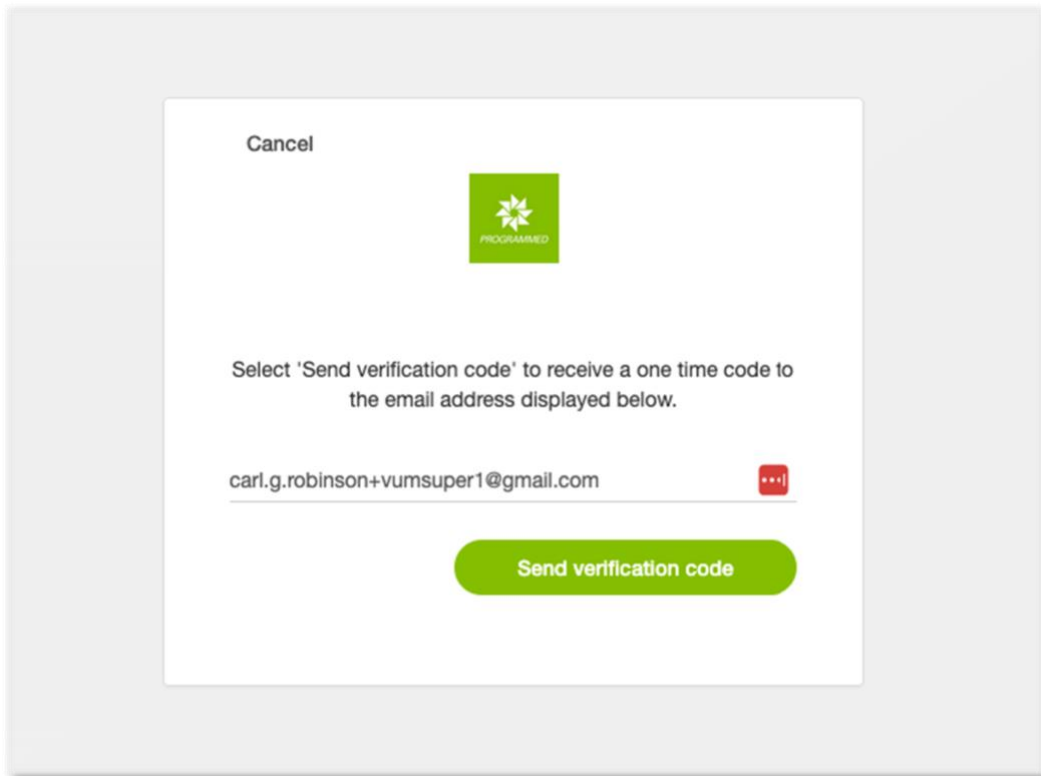
Role *

Vendor *

Site


Accept Invite

Follow invitation link and request verification code




Enter verification code

Cancel



Verification code has been sent to your inbox. Please copy it to the input box below.


carl.g.robinson+vumsuper1@gmail.com 

Verification code


[Send new code](#) [Verify code](#)

Once verified, click continue

Cancel




E-mail address verified. You can now continue.


carl.g.robinson+vumsuper1@gmail.com 


[Continue](#)

Select which sign up method to use




Choose one of the following options to continue

 Sign up with email


 Sign up with Microsoft


Sign up via email – Enter password details. After setting password you will be logged.

Cancel



New Password is required.

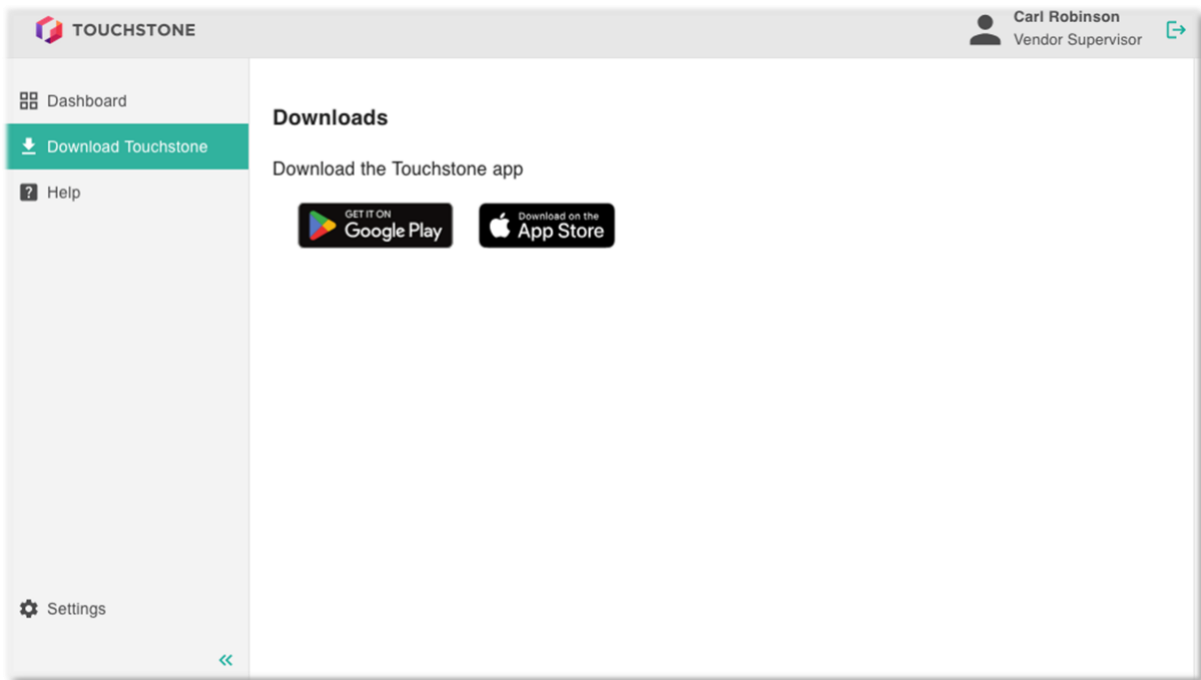
New Password 

Confirm New Password 

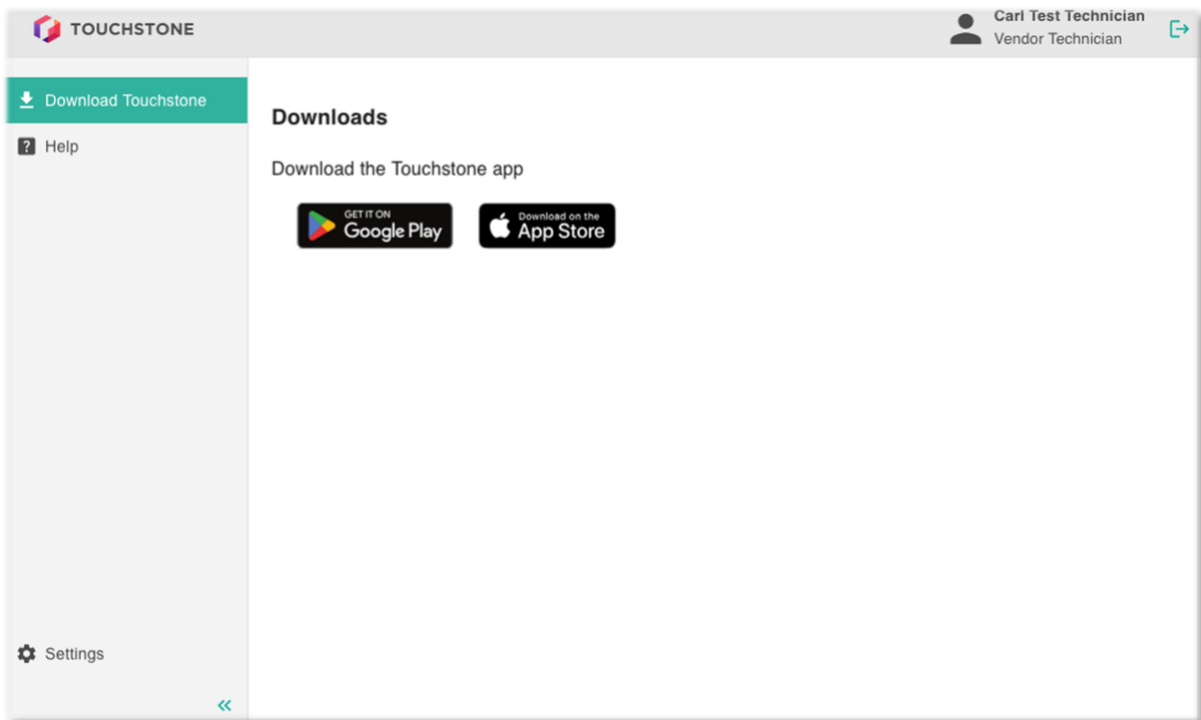
Create

Download Touchstone

All users can access the download page

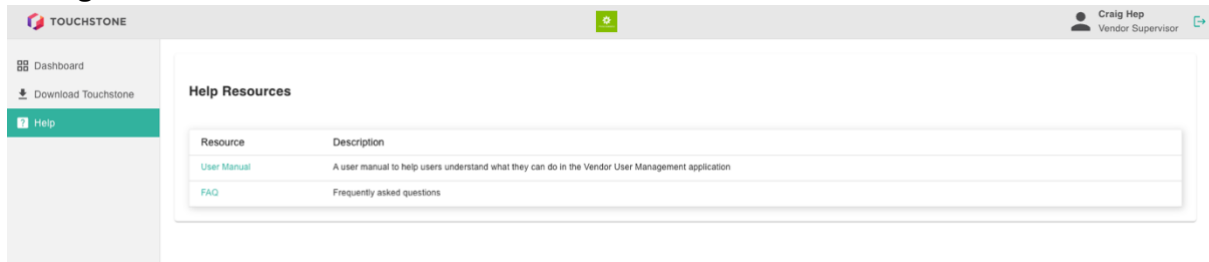


Technicians can only access the download page



Help documents

All user roles can access the help document links if they are available in the VUM configuration.



The screenshot shows the Touchstone application interface. The top navigation bar includes the Touchstone logo, a green status indicator, and the user profile 'Craig Hep, Vendor Supervisor'. The left sidebar contains navigation options: 'Dashboard', 'Download Touchstone', and 'Help' (which is highlighted in green). The main content area is titled 'Help Resources' and contains a table with two rows of help resources.

Resource	Description
User Manual	A user manual to help users understand what they can do in the Vendor User Management application
FAQ	Frequently asked questions