

Rent Blaze Account Switcher

🚩 *PLEASE NOTE: In earlier notes this was first called "Property Switcher", later it developed into "Account Switcher". I know I have listed and mentioned many things about this as it was a concept that kept developing. My apologies for any confusion. Hopefully, this will be a final "clearing up" of it and we can get it to function well moving forward!*

Concept:

The idea behind this is that (hopefully) a person will have more than one role in the system as they will use it for multiple things (using same email and not having to create multiple accounts). They will also (hopefully) have more than one property. As this system (hopefully) expands to be able to track and rent other things besides housing, they would also want to be able to use the same account to handle all of those things. The Account Switcher is where they can switch between these different Accounts/Properties/etc. with ease. *Originally, I had conceived of an "ALL" option, but to be honest, that is going to bring up more confusion and a coding/display nightmare and I think we can handle showing the data that I was hoping to have this show via Reports - so we will NOT have an "All" option.*

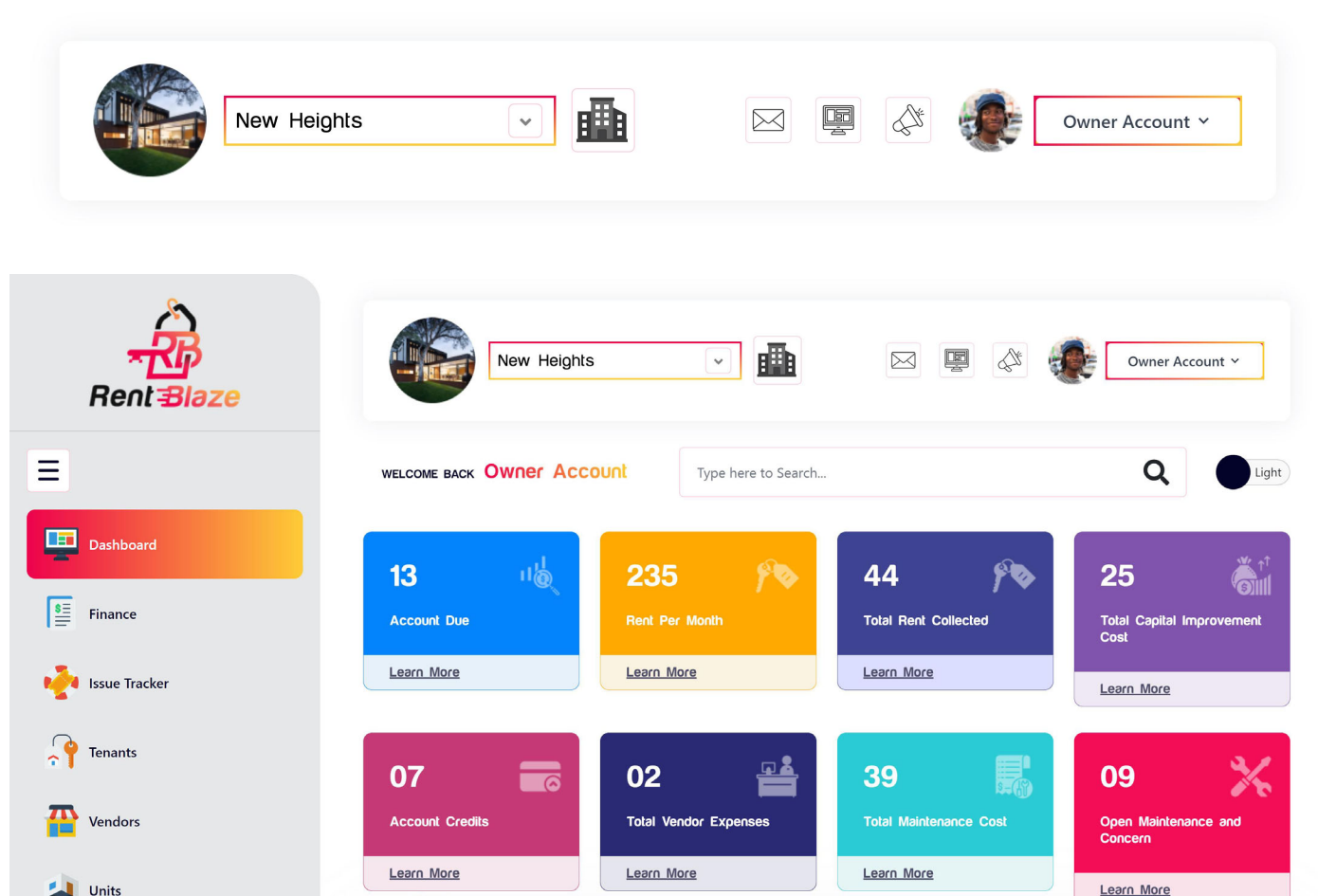
🚩 *IMPORTANT:* Whatever option is selected in the Account Switcher is what they would be working with—so the menu items/etc. would all be dependent on the selected Account. Therefore, the selected account MUST stay selected/shown as different pages/modules are worked with UNTIL it is manually changed by the user!

Design Changes:

Properties Link

Since the "Properties" button is what is used to ultimately set up what the left menu items would then manage, it actually makes sense that the "Properties" link is NOT part of the left menu. For the Owner Accounts, I would like the "Properties" Button

removed from the left menu and put next to the Account Switcher. I would like it to look "different" then the outlined buttons (which I would want a bit smaller) to signify it is a bit different, I added a [property-dk](#) icon in the Google Drive Icon Folder that I want to use (I would like the hover effect to change it to the colored icon). I also created a [property-lt](#) version for the dark mode. This Property Button would only appear for an Owner Account/while in an Owner Property.



When an Owner first Creates an account, they would be sent right to the Properties link as they need to create a Property. If there are no other "Accounts" or Properties, this property will be the default to load when they login. In their "Account Settings" there should be an option to select default account on login where they can select whatever account/property they want to load when they login.

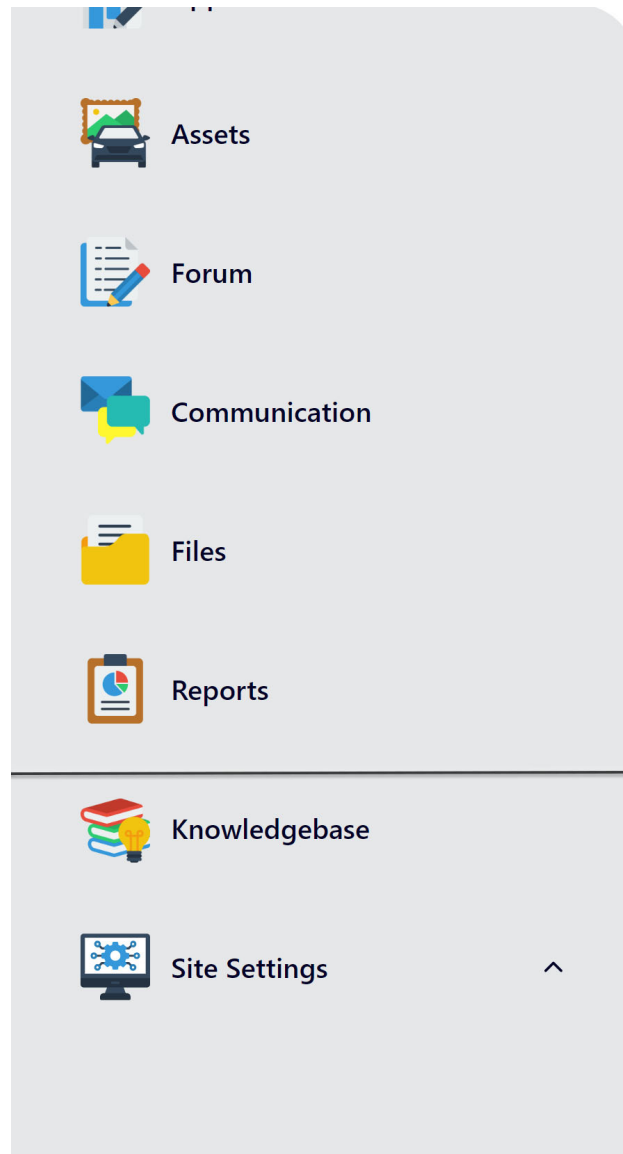
TO SIMPLIFY THIS: ON REGISTRATION, ONLY THE REQUIRED FIELDS OF THE PROPERTY COULD BE ASKED AS PART OF THE REGISTRATION FORM: NAME, ADDRESS, CITY, STATE, ZIP CODE. This could then automatically create the property when they log in, so it would just go to the dashboard, then they can use the "Property" Button to pull up the properties screen and "Edit" that Property with more info.

Other Account types would already be attached to a property or would have their own options/dashboard already - only the "OWNER" account would have to create their property at the start.

▶ Since an Account/Property would always need to be selected in the Account Switcher, there wouldn't be a need to have it say "Select" as there should never be a time that an Account/Property is not selected!

Left Menu

The left menu would consist of whatever is needed for the selected account. I would like a line (stylized) to separate the Knowledgebase/Site Settings links (since those are universal for the type of account and not effected by individual properties [Admin Settings would appear if the Super Admin Account is selected, OWNER settings would appear if any Property Account is selected) and the Different Modules for managing the Selected Rental Property. If they have a Tenant Account as well, then the Tenant Menu shows (no Property Button). If an Admin Account is selected in the Property Switcher, than the color theme changes to the Admin Theme and the admin menu is shown.



🚩 **REMINDER:** A person would receive the role of a Staff Member, Customer, or an Admin by that created for them. So if their same email is added, it would just add that option to their account.

Vendors and Tenants could be created by other Owners -OR- people will be able to create them (People can sign up for a "Renter" role which is the Tenant Role before it is attached as a Prospect or attached to a lease to be a

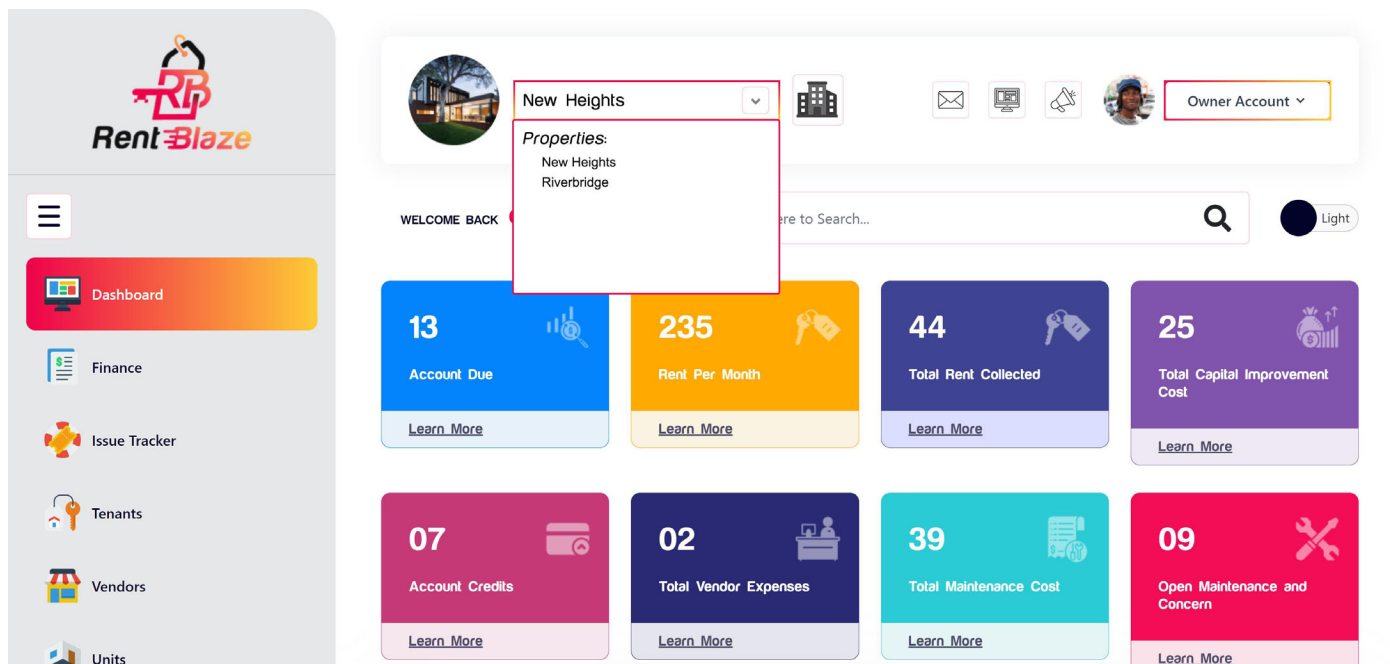
Tenant...this will allow them to post and browse listings in the later "Listing" Module. Vendors can/will be able to sign up on their own as a Vendor. So, eventually, in the Account Settings they will need an option to "Activate Renter Account" and "Activate Vendor Account" on their Profile).

Account Switcher Style

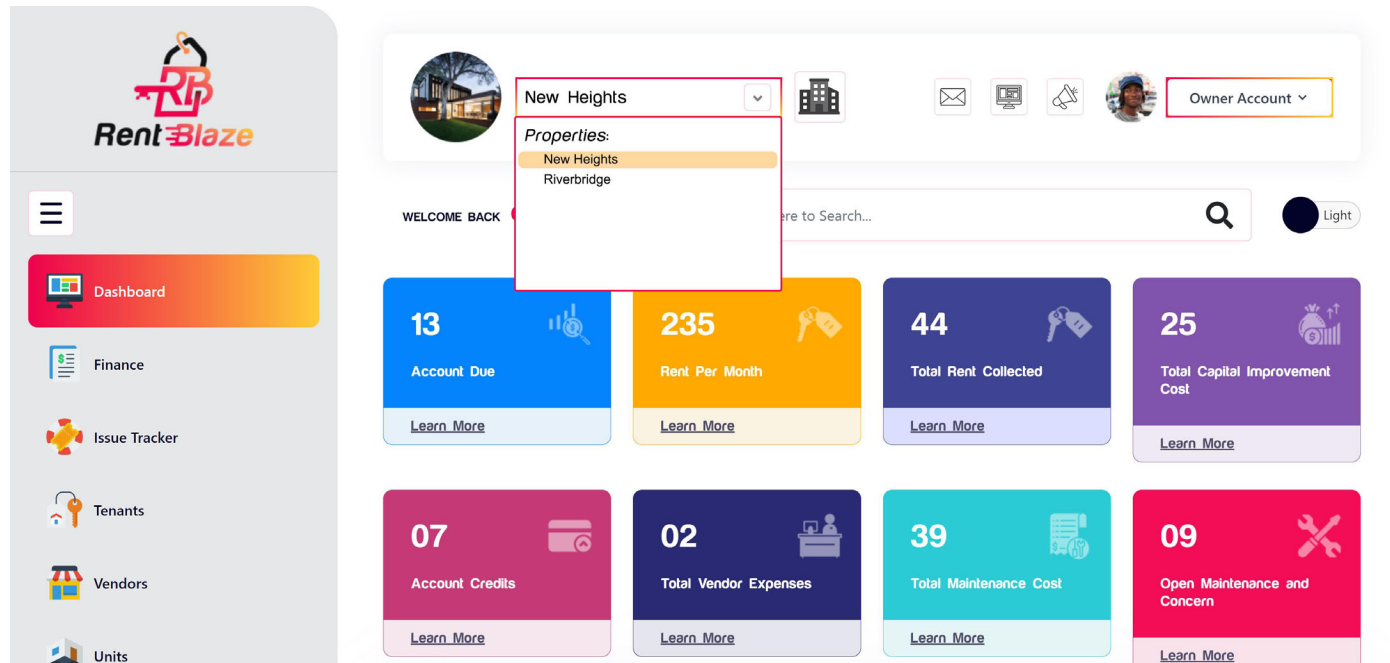
I have never been happy with the style of the Account Switcher. I know it was something I was working on since Hamza was working on it. I really do want it styled nicely. I would like the selected Account to be in the Logo Font and large. The dropdown window I would like taller so there won't be as much of a need for a scroll. The categories should look different than the actually Accounts that are available. Only Categories that apply to that User should be shown.

Here is an Example of how I envision it with a person that has only an Owner Account:

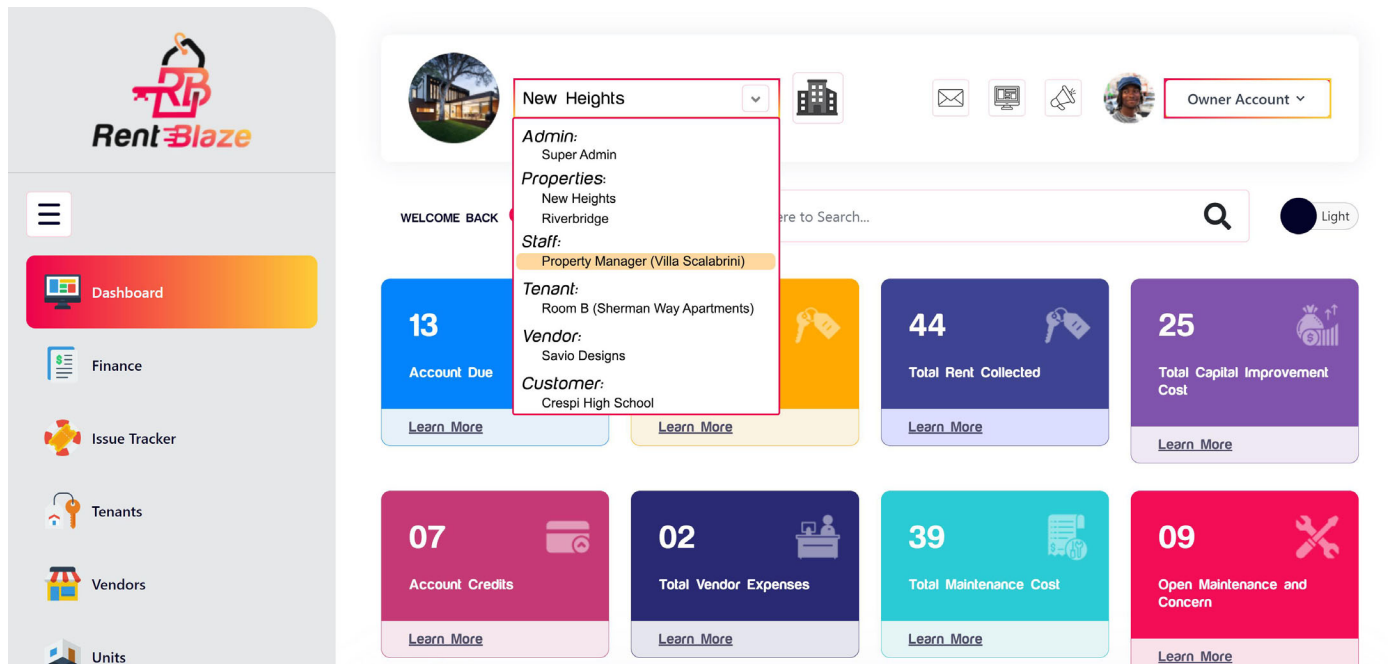
The "Categories" would be in the Logo Font and the selectable options would be indented slightly. There would be a little bit of space between the categories.



As they hover over their selection there would be a background color (I am using the red for the box and a less opaque orange from the selector for the colors in the sample):



Here is an Example of how I envision it with a person that has Multiple Accounts/Roles in the System:



Ideally, the selector box would grow vertically with the content, using a scroll bar ONLY if the content is too much for the screen size.