

# SmartBlock Users' Guide

Connections Housing

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# Contents

## Table of Contents

Frontend.....	3
Admin.....	5
Admin Dashboard .....	5
Admin Event Info .....	5
Admin SmartBlock.....	7
Admin Hotels.....	7
Request Listings .....	8
Linked with PK.....	9
Emails .....	9
Reports.....	9
Merge Requests .....	9
Retrieving xml/csv files from Passkey.....	11
SmartBlock Setup.....	12
SmartBlock Assignment .....	13

## SmartBlock Users' Guide

The SmartBlock application is divided into two parts:

1. **The Frontend application** – for customer data entry for an event and requires only the access URL, which is displayed in the top right corner of the admin Dashboard page.
2. **The Admin application** – administers and controls frontend entries, entering new client/events, and the link to Passkey. It requires User ID (email address) and password security.

### Frontend

The frontend application starts up with one of three screens: the agreement screen, the not yet open screen, or the closed screen.

- The **agreement screen** means that the event is open for requests. The user is supposed to read the Policies & Guidelines, check the box that says, "I have read and acknowledge the event policies & guidelines", and click the "Get started" button.
- The **not yet open screen** features a countdown clock to the Sub-Block Open Date (which can be configured in the admin Event Info/Dates panel).
- The **closed screen** announces that the event is closed because the Sub-Block Close Date has passed (which can be configured in the admin Event Info/Dates panel).

Following the frontend start up screen, the normal request entry process will include a Requirements screen where the user can select checkboxes that are needed for their request, contact information screen, screens for each of the selected checkboxes, a summary screen with edit opportunities, and a confirmation screen. At any time during the entry process, the user can click the SB symbol in the upper left to restart from the beginning, resulting in all entries being deleted.

All screens of the frontend application include three horizontal lines in the upper right corner that expand a heading. The left side of the heading has the event name, the event dates, the event location, and the event venue (which all pull from the Passkey link). The middle of the dropdown heading lists any reference documents that might be useful (which can be configured from the admin Event Info/Event Options/Documents panel). The right side of the heading contains the CH email and phone number for the event. These are entered by clicking the pencil icon to the right of the client name in the opening admin screen, this contact information is set at the client level and not the individual event level. Clicking the three horizontal lines again closes the heading back down.

There is also a footer on all of the frontend screens including the event name and the Event URL (which can be entered from admin Event Info/Event Options/Event Url).

After clicking the "Get started" button on the startup screen, the user reaches the **Requirements screen**. This screen can have up to 4 checkboxes, by default labelled: Entitlement Room Accommodations, Main Block Room Accommodations, Suite Requests, and Meeting Space Request. Which checkboxes appear and what they are named can be configured from the admin Event Info/Pages panel.

Following the Requirements checkbox screen comes the **Contact Information screen**. All fields on this screen are required to be filled out. The name of the Title Field and Company Field can be

customized from the admin Event Info/Event options panel. The user can enter one or more sets of contact information for his/her requests. Just click the Additional Contact button in the top right for each additional contact. The most recent additional contact entry can be deleted with the Delete Contact button. The company/organization name within the Contact Information screen may be slightly altered with a numeric suffix (-1, -2, etc.) added to the end if the name is not unique within the event.

The [Entitlement Room Accommodations page](#) at the top directs the user to select a specific number of hotels (the target number of entitlement hotels is set in admin Event Info/Event Options/Limits/Contact Fields). To select a hotel, the user simply clicks Select Hotel. To see more detailed information about a hotel, the user clicks Detail. Once the user selects the proper number of hotels, the hotel blocks will square up and the user must rank the hotels by preference (Rank Hotel) or remove the hotel from the group (Remove Hotel) in order to select a different hotel.

The next section of the entitlements request page is a dropdown where the user selects their attendee type to see their rooms per night allotment. Attendee type and room limit is set in admin Event Info/Event Options/Entitlement Restrictions. Following this is a calendar grid where the user inputs the number of one and two bedded rooms they need for each night. Then, any comments pertaining to the room selections can be entered.

The [Main Block Room Accommodations page](#) at the top tells the user how many hotels they have selected out of the required number (the required number of main block hotels is set in admin Event Info/Event Options/Limits/Contact Fields). To select a hotel, the user simply clicks Select Hotel. To see more detailed information about a hotel, the user clicks Detail. Once the user selects the proper number of hotels, the hotel blocks will square up and the user must rank the hotels by preference (Rank Hotel) or remove the hotel from the group (Remove Hotel) in order to select a different hotel.

In the next section of the main block request page the user inputs the number of one and two bedded rooms they need for each night in a calendar grid. Then, any comments pertaining to the room selections can be entered.

The [Suite Requests page](#) starts with three dropdown hotel selections for 1<sup>st</sup>, 2<sup>nd</sup>, and 3<sup>rd</sup> choices (three hotels are required to be selected). Date pickers for arrival and departure dates are provided or the user can just enter the digits for month, day, and year. Suite type (such as 1 bedroom) is next followed by the name for the first guest and a name for the second guest (if there is one). Then there is a spot for comments. There is also a button for adding additional suite requests. All fields on this page are required to be filled in except for second guest and comments.

The [Meeting Space Request page](#) also starts with three dropdown hotel selections for 1<sup>st</sup>, 2<sup>nd</sup>, and 3<sup>rd</sup> choices. Date pickers for start and end dates are provided, or the user can just enter the digits for month, day, and year. For these selections, the start and end dates can be the same day. Dropdowns are provided to pick the hour, minute (00, 15, 30, 45), and AM or PM for Start Time and End Time. Then there is a spot for number of guests and Room Setup (examples are conference, breakfast, lecture, etc.). There is also a spot for comments and a button for additional meeting space requests.

The next screen is the [Request Summary](#) where the user's entries and selections are summarized in individual blocks. Just click the Edit button in each block to change or edit the entries for that block.

After your changes, you will come back to this summary page. Pressing Submit at the bottom of the summary page saves your entries and triggers a confirmation email to your entered contacts. The email is also bcc to the CH client email address.

## Admin

The current URL for SmartBlock admin is <https://smartblock.connectionshousingapps.com/admin>.

**PLEASE NOTE: Before building your SmartBlock site in the Admin Dashboard- the Passkey Event site must be completely built and proofed.**

After you log in, you will see a listing of clients. You can edit client specific information by clicking the pencil icon to the right of the client name, keep in mind this will change information on any open SmartBlock Request sites under that client. You can add a new client by pushing the Add Client button. After clicking a client name, you will come to the Events page, where you can click on an event name or add an event by clicking the Add Event button.

At any time in the admin application you can click on Home at the top of the screen to get back to the client listing or click the dropdown with your email address at the top right to logout.

## Admin Dashboard

The opening screen of your event's admin is the **Dashboard**. On the top right is the Customer link which connects to the frontend application. This page contains the following sections:

1. The first is an interactive list of Unassigned Inventory. Click the blue confirmation number to see an editable screen of block requests.
2. The upper right quadrant contains a donut graph of request status. Roll your mouse over the chart to see the actual numbers of each type of request. Click one of the colored buttons below to go directly to block requests with that status.
3. The bottom half of the display shows an overall inventory breakdown in Bar Graph or Table format. Pass your mouse over the Bar Graph to see the underlying actual numbers for each day. Click on Table to see some other statistics at the bottom including total confirmations, meeting spaces requested, suites requested, entitlement room nights, and main block room nights.

## Admin Event Info

The next item down on the left panel admin menu is **Event Info**. This section is broken into 6 different tabs: Event Info, Dates, Venues, Pages, Verbiage and Event Options. Additionally, the Sync Event button is in the upper right corner of this section. Pressing this button will load the latest availability information from Passkey including any new links set up (Attendee Type Name in Passkey equals Organization Name in SmartBlock). The Sync Event button can be pressed in admin for a specific event only if at least 30 minutes has passed since the last time the button was pressed.

The **Event Info tab** is the opening screen for this section and contains information about the event loaded from Passkey. This pulls from Passkey and cannot be edited in the application.

The **Dates tab** allows the admin to enter or change important event milestones. The Sub-Block Open Date and Sub-Block Close date determine whether the frontend application is live or not. The Room List

Deadline is printed in the Block Confirmation email. The Sub-Block Grid Start Date and Sub-Block Grid End Date determine the boundaries of block request calendars in the frontend application. Be sure to press Submit after adding or changing any info on the screen.

The [Venues tab](#) displays the main venue for the event as recorded in Passkey and cannot be edited in the application. This address will be used in mileage calculations.

The [Pages tab](#) is where you determine which pages are available for the frontend application. If checked, then that page will be live for the frontend. To the right of each page name is space where the admin can rename the frontend page. Since the first word of the renamed page is sometimes used as a short name for the page, make sure the first word of your new name is meaningful. Press the Submit button to save changes.

The [Verbiage tab](#) is where much of the verbiage in the frontend application can be tailored to a specific event. Some other verbiage can be changed in the Emails/Edit section or the Event Options section, but most of the verbiage resides here. Some of the entries allow for enhanced text, which is indicated by a clickable heading line that allows for changing text styles, entering a link, bulleted or numbered lists, inserted images, etc. Be sure to press the Submit button to save any changes. Any verbiage you are not able to edit is hardcoded and cannot be changed.

The final tab in the Event Info section is [Event Options](#):

- [Limits/Contact Fields](#) –
  - Enter the number of Main Block hotels required to be selected by the frontend user.
  - Enter the number of Entitlement Hotels required to be selected by the frontend user. If this is left with No Selection, then the count will auto-default to 6. If there are less than 6 hotels, the count will auto-default to that number.
  - Enter the number of contacts you want included on the Requests Report. If this is left with No Selection, then the number of contacts in the report will default to 2.
  - Customize the names for Contact Title and Contact Company if applicable
  - Press Submit to save changes.
- [Entitlement Restrictions](#) – allow entry or deletion of entitlement names and their associated room limits. The dropdown order on the frontend will be the same order as entered in admin. Press Submit to save changes.
- [Documents](#) – allows the admin to attach PDF documents to the frontend header menu
- [Header Image](#) – allows the admin to load the Event Header Image which displays on the opening page of the frontend. If a header image has been loaded previously, then its size in pixels is displayed above the image. Optimal size for header is 600 pixels wide by any pixel height (that will not distort the image). Remember, the image is not saved until Submit is pressed and **the customer end will not operate without an image uploaded.**
- [Event Seal](#) – allows the admin to load the Event Seal which is used on confirmation emails. If an event seal has been loaded previously, then its size in pixels is displayed above the seal. Optimal size is 400 pixels by 400 pixels. See Digital Marketing if you need help with sizing and/or to create the seal. Remember, the image is not saved until Submit is pressed and **the customer end will not operate without an image uploaded.**
- [Passkey Event Url](#) – the Open Event link to the Passkey event

- *Event Url* – the web link for the event which appears in the frontend footer

## Admin SmartBlock

The **SmartBlock** section will suggest an automated assignment strategy based on customer requests and Passkey availability. Make sure that you have clicked the Sync Event button described in the previous section so that the most recent Passkey availability is loaded (you must wait 30 minutes between button presses).

- Click Assign Hotels on the top right to run the recommended assignments (may take a few minutes – do not leave page until complete)
- Click SmartBlock – Assigned Blocks to review recommendations. Here is how the recommendations are made:
  - No hotels with Max room limits:
    - SmartBlock will compile all requests that are in pending or Unassigned Inventory status and order them by their smart block request date.
    - It will then go through each of their choices looking for a hotel that will fit both their 1 and 2 bed needs. It does this by looking for rooms with max occ of 2 for the one bed requests and max occ of 4 for two beds requests.
    - If there are no hotels that will fit their request based on the PK occupancy, it will go through again ignoring the request for 1-bed rooms and assigning them to rooms with the max occupancy of 4 if available.
    - If no hotel will fit their block it will be changed to the “unassigned inventory” status and an alert will appear on the dashboard.
  - Hotels with Max room limits
    - If a hotel has limits it will follow the same process as above but looking at only assigning the max number of rooms allowed at the hotel.
    - After assigning the max allowed/available at the first possible hotel, it will move on to the next through the choices until the entire block is assigned or no inventory matches remain.
    - If recommendation process does not allow for all the requested rooms to be assigned, the request will be changed to the “unassigned inventory” status and an alert will appear on the dashboard.
- For the list of requests within the smart block:
  - If the entire block was assigned, the record still shows as “Pending”, however, when you click on the confirmation, the summary will show the recommended hotel assignment(s).
  - If the entire block was NOT assigned, the record shows as “Unassigned Inventory”, however, if any portions of the block were assigned, they will display when you click the confirmation.

## Admin Hotels

The next item down on the left panel admin menu is **Hotels**. This brings up a list of hotels loaded from the Passkey event database.

Click the name of the hotel for a dropdown list of available room types. Click the Edit pencil icon to the right of the hotel name to bring up the Hotel Info screen. This displays the most recently loaded

hotel inventory table as well as the hotel's Passkey logo image and address information.

The next tab in the top menu is Hotel Details. The hotel image and description are automatically pulled from Passkey. In addition, you can set the options that will be used for Entitlement and Main Block frontend hotel selection:

- The checkbox labeled Entitlement Room Accommodations (or whatever custom name that may have been entered under Pages) marks the hotel for Entitlement Block rather than Main Block.
- The Hide Hotel checkbox will not show the hotel for selection in Entitlements or Main Block frontend pages.
- The Hotel Sold Out checkbox will display hotels in Entitlements and Main Block but will not allow them to be selected, instead showing Sold Out on the hotel image.
- The Badge entry can be used for an abbreviation or a short advertisement.

The next tab in the top menu is Rooms. The Hide Room checkbox will remove a room type from consideration (for example Concession rooms or ADA). This information is also pulled over from Passkey. The Passkey room type name must match the Smart Block room type name for updates to sync over correctly. If it does not, Smart Block will create a new room type. Depending on the edits you can just Hide the old room type or ask Support to delete it in the back end of SmartBlock. This is why you must have the Passkey build fully completed before building SmartBlock.

The next two tabs, Amenities and Venues, display the information pulled from Passkey and is not editable within the application.

## Request Listings

The next three left panel admin menu items: **Block Requests**, **Suites**, and **Meeting Spaces**, list customer requests and are similar operationally. The filter/sort/search line towards the top of the pages has four dropdown selections, a text entry area, and an Apply button.

- Use the Sort dropdown to select sorting the request listing by Entry Order (default), Status, or Organization Name. Press the Apply button to initiate the sort.
- The Search dropdown allows the admin user to search for Organization Name, Contact Name, Contact Email, or Confirmation Number. After selecting the search target, the admin user can enter one or more characters to search for in the Search For box and then hit the Apply button. The search is case insensitive and will search for consecutive characters found anywhere in the search target.
- The Display dropdown determines the field that is displayed in the next to last column of the Block Requests listing. Date of entry is the default with other choices being email and entitlement restriction. Press the Apply button to initiate the display.
- The Status filter dropdown allows the admin user to view a listing of all statuses (default) or to select a single status to show in the request listing. Press the Apply button to initiate.

Clicking the blue confirmation number from Block Requests will bring up all the information about the block requests linked to that confirmation (main blocks and entitlements). Various Edit and Delete buttons are supplied for changes.

Clicking the blue confirmation number in a row from Suites will bring up all the information about the suite requests linked to that confirmation. Various Add, Edit, and Delete buttons are supplied for

changes.

Clicking the blue confirmation number in a row from Meeting Spaces will bring up all the information about the meeting space requests linked to that confirmation. Various Edit and Delete buttons are supplied for changes.

The blue Edit pencil at the right of each listing row brings the user to the main edit screen for a confirmation. Click the Edit Contact button to alter primary contact information or to add, change, or delete additional contacts. Other buttons across the top trigger edits of all other aspects of the confirmation including Status and Entry Date. Please be aware that changing Status and/or Entry Date can alter the normal operation of SmartBlock.

## Linked with PK

Selecting the Linked with PK left panel menu item will automatically look for a match in the Passkey Attendee Type Name and the Smart Block Organization Name. If a match is found and the Organization ID is not provisioned in the Attendee Type table, then the Organization id is entered in the appropriate Attendee Type table row. This activity is tracked in the system log.

The admin user should see a listing of Assigned Organization emails titled Assigned – Emails not Sent. Clicking the blue organization name brings up the hotel name and assigned room types by day. There is also an option to Send Email-which sends the block confirmation to the contact email on the request. Pressing the far-right blue Passkey link displays the hotel and room assignments as well as Contact information with edit capabilities.

Clicking Assigned – Emails Sent brings up a list of organizations whose block confirmation emails have already been sent. Clicking the organization name brings up the hotel(s) and room assignments by day. There is also an option to resend the email and a blue Passkey link that works in the same way as it does in the previous paragraph.

Sent emails will have a bcc to the CH client email address.

## Emails

The Emails left panel menu item displays a preview of the Request Confirmation Email. Click Sub-Block Confirmation Email to display a preview of that email. Both previews have an edit option button on the top right that brings up minimal verbiage tailoring opportunities for the email.

## Reports

The next left panel menu item, Reports, displays report options. Reports are downloaded to an Excel file on the admin user's computing device.

## Merge Requests

The final left panel menu item, Merge Requests, enables the merging of two confirmation numbers into one. The remaining confirmation number is called the parent and the removed confirmation number is called the child. The first page that comes up after clicking Merge Requests is the Select Parent/Main

Confirmation page. This is a pick list of all Pending confirmations for this event. Click the confirmation number to see more information about the organization contact. Just click the radio button to the right of the confirmation that you wish to be the parent. Then click Apply Parent Selection in the upper right to save the selection. The next display page is the Select Child/Subsidiary Confirmation page. This is a pick list of the remaining Pending confirmation numbers for the event. Click the radio button to the right of the confirmation that you wish to be the child. Then click Apply Child Selection to continue the merge process. If there are no errors, the next display will allow the user to view and edit the resulting confirmation. If there are identifiable problems before the merge process begins, then an error page will be displayed listing the errors. Errors include:

1. Parent confirmation in attendee types table
2. Child confirmation in attendee types table
3. Parent confirmation in assigned blocks table
4. Child confirmation in assigned blocks table
5. Parent and child both have entitlements, but they have differing entitlement restrictions
6. Totaling the entitlement rooms for a particular date goes over the limit for the entitlement restriction

The following logic is used for the merge. Comments for a particular kind of request (suites, meeting spaces, main block, or entitlements) are unified into a single comment with a semicolon separator. Main block rooms are added up by room type (one bed, two beds) by day. Hotel ranking for main block rooms will be the parent choices if there are parent main block rooms. Entitlement rooms are added up by room type (one bed, two beds) by day. Hotel ranking for entitlement rooms will be the parent choices if there are parent entitlement rooms. Child contacts will be added to the parent contacts. Child suite requests will be added to the parent suite requests. Child suite request hotel rankings will change to the parent hotel rankings if there are parent suite requests. Child meeting space requests will be added to the parent meeting space requests. Child meeting space request hotel rankings will change to the parent hotel rankings if there are parent meeting space requests. Finally, the child organization table entry and the child confirmation number table entry are deleted.

## Retrieving xml/csv files from Passkey

SmartBlock contains a utility that retrieves Get Event Details xml/csv files extracted from the Passkey database. The URL for this activity is <https://smartblock.connectionshousingapps.com/getxml>.

You will need to know the Passkey event ID's for the xml/csv files you wish to retrieve. The **first step** is to select what kind of data file you wish to pull, csv or xml. The csv files come in two different varieties: simple and advanced. The simple csv files have the following heading:

Event ID,Event Name,Hotel Name,Room Type,Attendee Type,Access Code,Date,Original Block,Current Block,Assigned Pickup,Total Pickup,Final Pickup

The advanced csv files have more columns:

GMEventID,EventLongName,EventStatus,EventStart,EventEnd,City,HotelId,HotelShortName,RoomType Name,RoomTypeID,AttendeeTypeName,AttendeeTypeCode,MaxGuestApplicable,Guaranteed,EffectiveDate,Original,Contract,Sold,TotalSold,FinalPickup,FreeSell,MinNightsStay,Amount

If you choose xml, then you can optionally choose any parts of the xml file that are irrelevant by checking the appropriate box(es).

**Step two** involves choosing the file delivery method. A single file can be downloaded to your PC or you can choose that the file(s) be emailed to the email address entered. A third choice is to pull the files for future use in merging or other operations, but not necessarily for immediate delivery. The final choice is for merging previously pulled csv files. The merged result will always be downloaded to your PC.

**Step three** allows the user to enter one or more Passkey event IDs (that have reglink enabled) to pull; each event ID goes on a separate line. The other possibility in step three is to check two or more listed csv files to merge. There are two lists of csv files, simple and advanced. Then the selected files will be merged together to form a single csv file named after the current timestamp. This file is automatically downloaded to your device.

## SmartBlock Setup

1. Set up your event in Passkey fully and completely first!
2. Write down your Passkey event ID (found at end of Open Event weblink)
3. Login to SmartBlock admin: <https://smartblock.connectionshousingapps.com/admin>
4. Click the Add Client button (unless Client is already added)
5. Fill in the info. Where it says, "Choose File", the file you are looking for is the event logo image
6. Press the Submit button
7. On the next screen, click the Add Event button
8. Enter the Passkey Event ID from step 2 and press the Submit button
9. Take a break for a few minutes while the data loads from Passkey
10. Click "Home" at the top of the screen
11. Click on your new client name (btw, if you click on the pen and paper symbol to the right of your client name from this screen, you can change the client info from step 5)
12. On the next screen, the Events list, click on your event. This should bring up the empty event dashboard. Please take note of the Customer link on the bottom. It is the web link for the user front end. Click on the left menu item Event Info.
13. Click the top menu item Dates, fill in the appropriate dates, and click the Submit button
14. Click the top menu item Venues and check that the venue info has been transferred from Passkey.
15. Click the top menu item Pages. Check the boxes next to the frontend forms you wish to collect from users. If you don't like the name of the frontend page, write in your own. Then click the Submit button.
16. Click the top menu item Verbiage. Here you can tailor the verbiage for SmartBlock to your event. After filling out a form, just hit the Submit button. Click on any of the verbiage items you are interested in customizing and do the same.
17. Click on the top menu item Event Options. Here you can enter the number of hotels requires to be selected for Main Block and Entitlement Block. You can also customize the Title and Company field names for the contact form. You can leave this alone and not press Submit if you are comfortable with what is there.
18. Click on the next event options item Entitlement Restrictions to list any entitlement names and room allowances. Press Submit when done.
19. Click on the next event options item Documents to upload any PDF documents you want available to users via the frontend header (such as hotel map). Press Submit when done.
20. Click on the next event options item Header Image where you can load the main splash image for the frontend application – Optimal image is 600 pixels wide and any pixel height. Press Submit when done.
21. Click on the next event options item Event Seal where you can select the seal of the event – Optimal image is 400 pixels by 400 pixels. Press Submit when done.
22. Click on the next event option Passkey Event URL where you enter the Passkey Open Event web link (usually is <https://book.passkey.com/e/Passkey-Event-ID>). Press Submit when done.
23. Click on the next event option Event URL. Here you can enter the clients event website link which will appear in the footer of the frontend application. Press Submit when done.

24. You are now ready to check the hotels. Click the left menu item Hotels. You should see a list of hotels. To check how Passkey set up each hotel, you click the pen and pad icon to the right of the hotel name.
25. Click the top menu item Hotel Details. Verify the information auto populated from Passkey is correct. You can set minimum night stays if necessary. The Badge field can be an acronym or a short ad similar to marketing messaging in Passkey. You can override this by entering a different Badge. The Hide Checkbox will not display the hotel for main block and entitlements. The Hotel Sold Out Checkbox will display the hotel in Entitlements and Main Block but will not allow it to be selected. Press Submit when done.
26. Select the top menu item Rooms and verify the information auto populated from Passkey is correct. Use the Hide Room checkbox to hide a room type you do not want to show as requestable. Press Submit when done.
27. Select the top menu item Amenities to see the Amenities available at the hotel as pulled from Hotel Library.
28. Repeat steps 24 through 27 until all the hotels have been reviewed.

### SmartBlock Assignment

1. Once requests are submitted you can either click SmartBlock on the side menu and use the automation selection process described above to assign hotel choices. Or you can setup manually in Passkey
2. When adding the subblock to Passkey you must use the exact Company name shown on the request in the SmartBlock contact site otherwise it will not sync.
3. After adding the block to Passkey and assigning hotels and inventory remember to have the box check under Website-Manage Settings-Reservation Options-“Show access code box in new reservation search”. As this is what SmartBlock uses in the block confirmation email
4. Additionally, make sure you setup the subblock as a planner in the Dashboard settings with full permissions to be able to upload their own room list.
5. Once done go back to SmartBlock and Sync the event
6. If everything is setup correctly you should see the status under Block Request change from Pending to Linked.
7. Under Linked with Passkey – Assigned Emails Not Sent you can go through each block and click Send Email to send them their Block Confirmation Letter. This is the final step apart from any reporting you would take in SmartBlock.
8. You can confirm the email sent under Linked with Passkey – Assigned-Emails Sent. You can also resend the email here if needed.
9. Continue managing subblock per policy through Passkey and event cycle as usual from here.