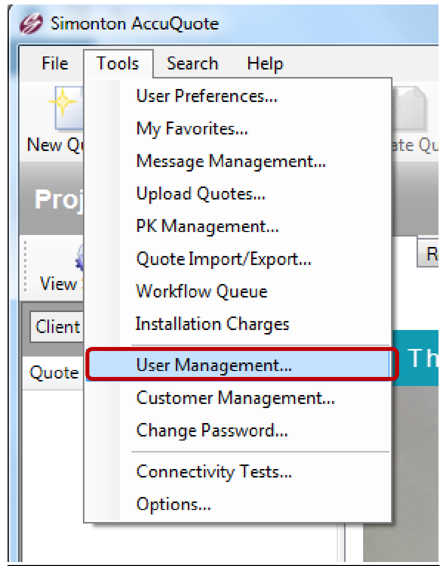
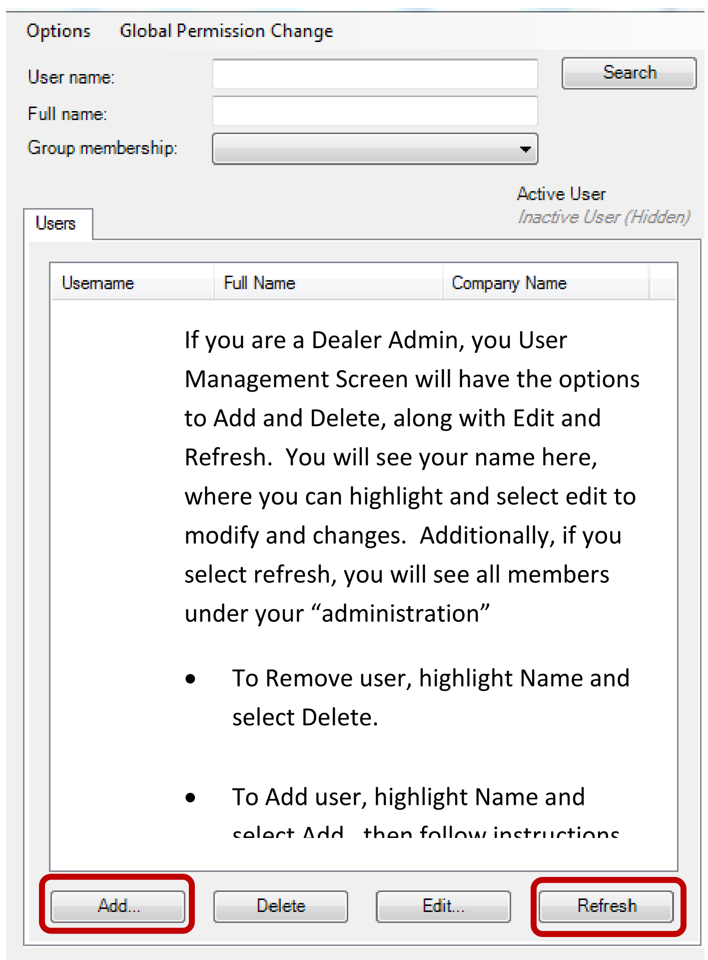
Dealer Admin Setup



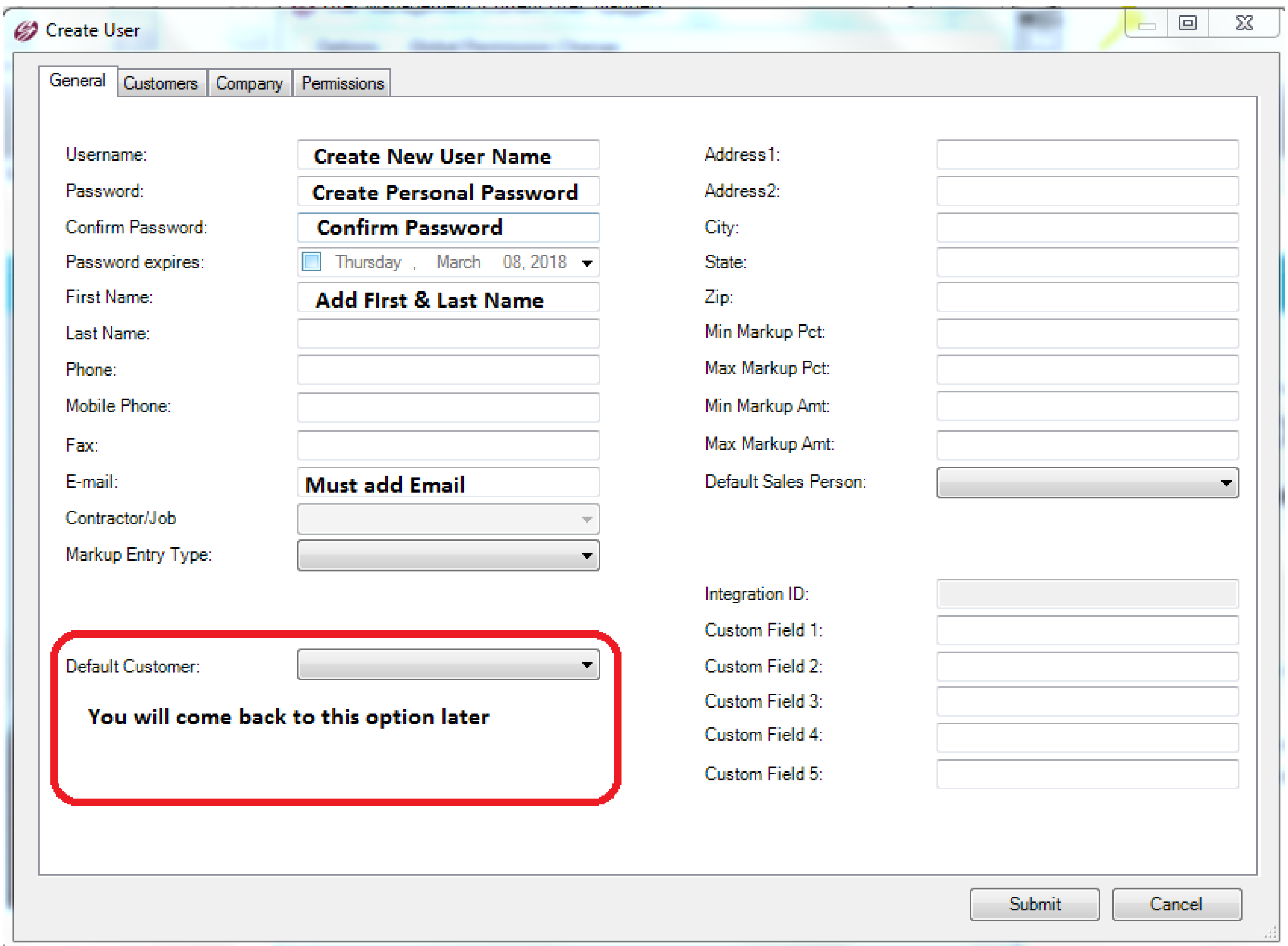


If you are a Dealer Admin, you User Management Screen will have the options to Add and Delete, along with Edit and Refresh. You will see your name here, where you can highlight and select edit to modify and changes. Additionally, if you select refresh, you will see all members under your “administration”

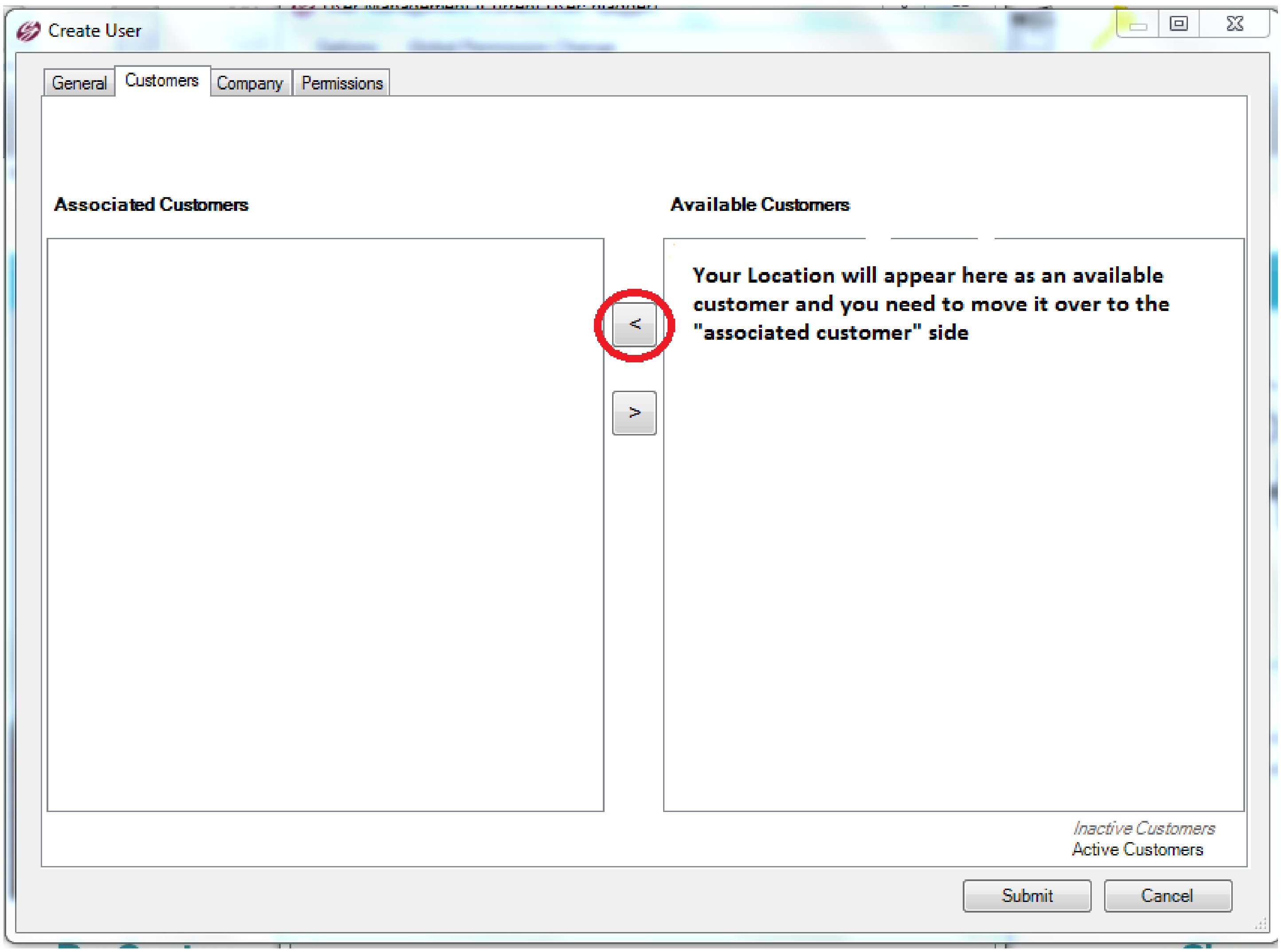
- To Remove user, highlight Name and select Delete.
- To Add user, highlight Name and select Add , then follow instructions

Adding a New User

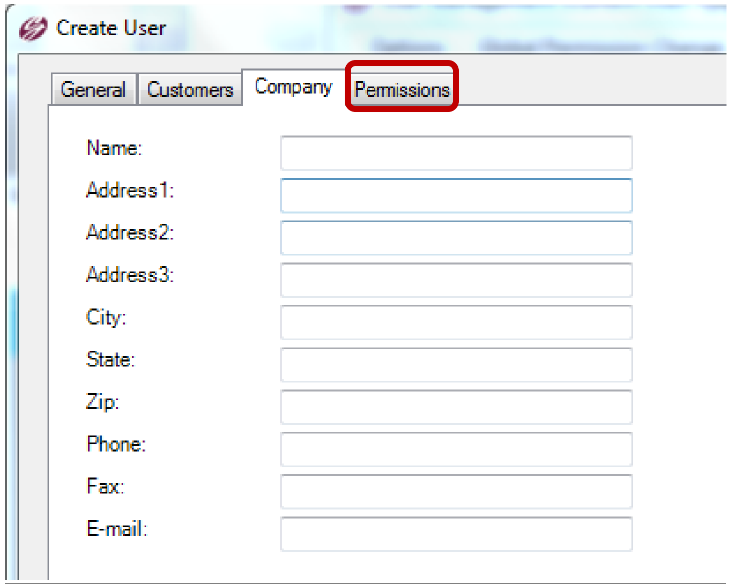
1. General Tab
    a. Create user name – typically first initial of their first name and full last name.
        i. *Ex: Nick Dunn = ndunn*
    b. Create personalized password and confirm
        i. You can push the expiration date of your password out to your desired date
    c. Add User First Name and Last Name
    d. Add Email – This will be used for the "Forgot Password" option on login screen



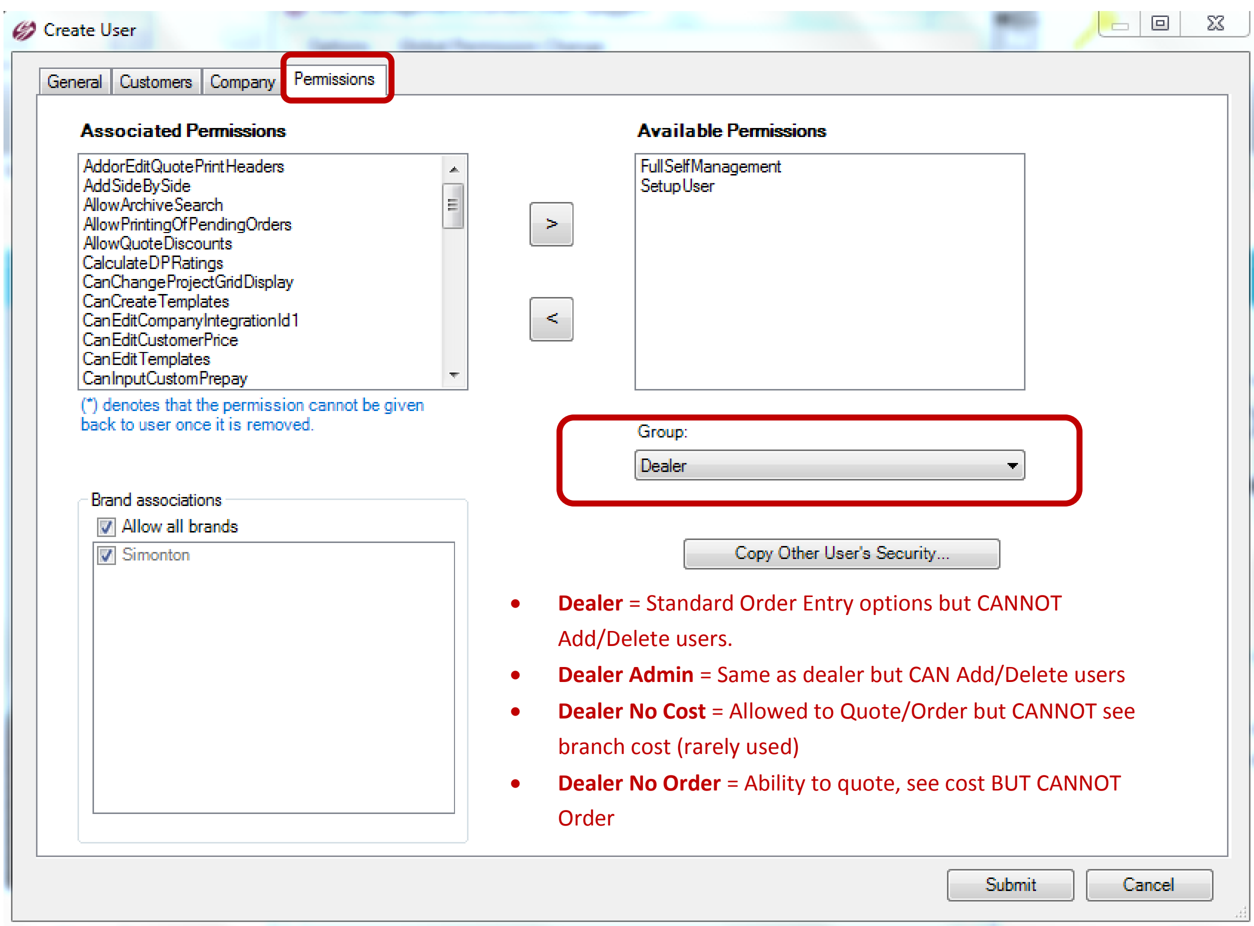
2. Customers Tab - Move company name from “Available Customers” over to “Associated Customers”



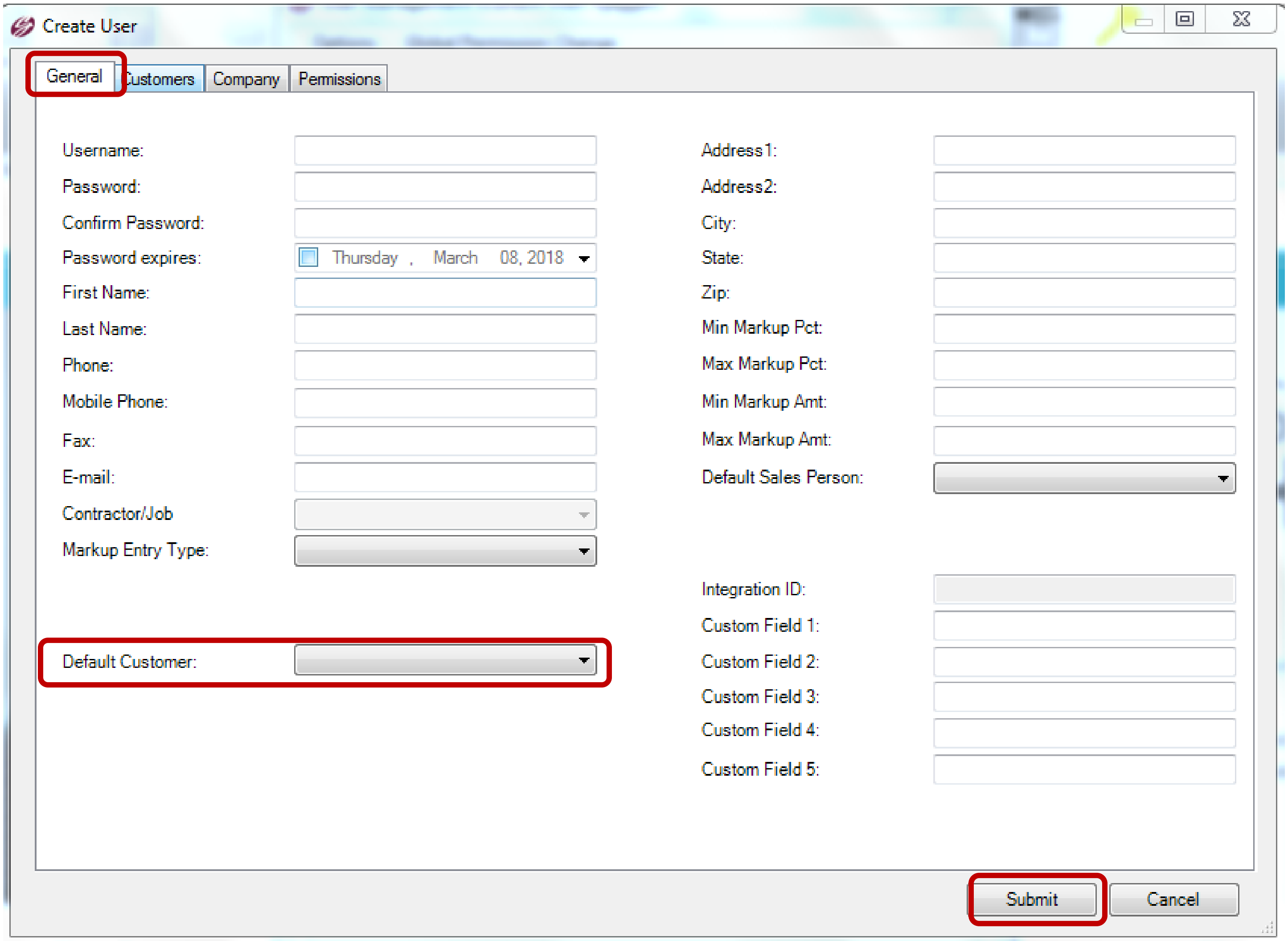
3. Company Tab – Add Branch Information
    a. Name = Branch Location



4. Permissions Tab



- **Dealer** = Standard Order Entry options but CANNOT Add/Delete users.
- **Dealer Admin** = Same as dealer but CAN Add/Delete users
- **Dealer No Cost** = Allowed to Quote/Order but CANNOT see branch cost (rarely used)
- **Dealer No Order** = Ability to quote, see cost BUT CANNOT Order



Select your location as the Default Customer … Then CLICK SUBMIT